

Old Kent Road Employment Study

March 2016

The Old Kent Road Employment Study is an employment study jointly prepared by the London Borough of Southwark and the Greater London Authority's Regeneration Team

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All surveys were completed in autumn 2014 and spring 2015.

Acknowledgements

All the guest researchers who gave their time to help with the initial survey work

Participants in the Old Kent Road Community Forum, whose invaluable local knowledge and helpful feedback shaped the report into a more accurate and user friendly document

Edmund Bird for his comments and historical insight

All the businesses that gave their time to participate in the creation of this study

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Weber Industries are an arts fabrication firm based on Haymerle Road. They have been commissioned for a huge variety of projects with past clients ranging from large retailers to well know fine artists

Introduction

The Old Kent Road is a historic London high street made iconic by its position as the lowest value property on the Monopoly board. Stretching across the borough of Southwark and into Lewisham, the road is a defining feature of a number of areas ranging from historic high streets to sprawling retail parks, modern industrial estates to densely packed warehouse units, Victorian terraces to post-war housing estates.

Tucked away within these diverse urban forms are a huge variety of businesses about which relatively little was known. This study aims to shed some light on the types of businesses that make up the economy of the Old Kent Road. It provides a snapshot in time of the overall distribution of different types of businesses and jobs in the area, along with a number of detailed profiles of individual businesses. By combining robust quantitative analysis with a more qualitative approach to understanding the businesses, this study is both a baseline for future plan making, and a celebration of the businesses' contribution to the unique character of the Old Kent Road, as well as the local and wider London economy.

Together with the Greater London Authority, Southwark Council are preparing a new plan for the Old Kent Road and surrounding area. The Old Kent Road

The study is both an important baseline for future plan making, and a celebration of the businesses' contribution to the local and wider-London economy.

area has the potential to support significant housing and business growth, which could lead to significant changes in the area. This study is an important first step in developing a robust evidence base and

detailed understanding of what currently exists in the area, an indispensable part of any plan making process. The plan will guide and manage new development and growth in the area over the next 15 years, and will look to bring about improvements to the quality of the environment along the road, reducing pollution and noise, as well as unlocking central London sites for potential growth. Plans to extend the Bakerloo Line along the Old Kent Road would be a key factor in driving these changes. The Old Kent Road Employment Study will be one of the first outputs of the evidence collection stage. It will form part of a suite of studies focussing on the Old Kent Road area, which together will form an important and rich resource to guide a placemaking strategy for this important part of London.

Historical context

The Old Kent Road has a long history dating back to Roman times, when it formed part of Watling Street, the Roman Road that linked Dover in the south east of England with Wroxeter in Shropshire. The road fell into disrepair following the departure of the Romans from England, but was later used during medieval times by pilgrims travelling to the shrine of Becket at Canterbury Cathedral in Geoffrey Chaucer's Canterbury Tales. The pilgrims were said to have stopped at a stream on the Old Kent Road at a place known as St Thomas a Watering, where the Thomas a Becket public house is now situated on the corner of Old Kent Road and Albany Road.

Largely passing through fields until the 19th Century, building occurred in irregular spurts along the Old Kent Road from the early 1800s with a diverse mix of elegant Georgian terraces and villas together with much cheaper housing and factories. In 1834 the large gasworks on the east side of the Old Kent Road opposite its junction with Commercial Way was founded by the South Metropolitan Gas Works Company, becoming a major local employer. Bricklayers Arms station was

opened by the South Eastern Railway in 1844 at the northern end of the Old Kent Road close to the foot of the fly-over of the same name built in the 1960s), on a short branch from their mainline because the company wished to avoid excessive charges at London Bridge station. However its site proved so inconvenient to passengers that regular passenger services ceased in 1852 and the station was converted into a goods depot and carriage sidings. The goods yard closed in 1962. The site of the depot was redeveloped in the 1990s as a light industrial estate served by Mandela Way.

Although hidden by later alterations to the historic built form, Old Kent Road formerly stood as an attractive, well used high street boasting public buildings and facilities, a range of taverns and small shops, and residential villas. In Victorian times tramlines were laid down the Old Kent Road for the first horse-drawn trams. In the early 1900s these were converted to electric trams and the traders that had lined the Old Kent Road during Victorian times were moved to East Street, where the thriving East Street market now takes place. The

last tram ran down the Old Kent Road in 1952, making way for the increasing volumes of vehicular traffic brought on by the popularisation of the private motorcar.

In the post war period, housing estates and retail warehouse sheds with large expanses of car parking replaced the tighter urban fabric on and off the road. Despite this decline the road had a successful evening economy well into the early 1990s, with young people using the area as a place to meet and socialise. These included the (in)famous Ambulance Station, part of an anarchist squat based in the old firestation. A number of high profile bands performed at the venue including the Jesus and Mary Chain, Chumbawamba, Pulp and Primal Scream. Other local musical connections included the Workhouse recording studios, where Ian Dury tracked his No. 1 hit 'Hit Me With Your Rhythm Stick' and post-punk icons Gang of Four recorded their seminal debut album 'Entertainment'. The road still continues to have some night time economy with a number of bars, cafes and restaurants open late into the evening.



Clockwise from top left
View along the Old Kent Road 1920

Former World Turned Upside Down public house

Shirley Temple in *The Little Princess* (1939) performing 'Wot Cher! Knocked 'em in the Old Kent Road'. Other performances of the popular music hall song include Julie Andrews, and Fozzy Bear for the *Muppet Show* (1977).

View of the gasometers c.1910, with the now demolished Turks Head public house in the foreground



Current context

While its significance as a pilgrim route may have diminished slightly the Old Kent Road continues to function as an important component of the London Inner Ring Road, as well as a connection between London and Dover. By linking inner London to outer London, the Old Kent Road has become an important transport corridor for buses – there are currently 11 routes travelling along it – while the connections to the wider South East and mainland Europe via Dover ensure a consistently high volume of large freight vehicles.

The size of the Old Kent Road combined with the sheer volumes of passing traffic, have had a marked effect area's streetscape. While development had traditionally oriented itself towards the road in order to make use of the high footfall and passing trade it offered, more recent developments have tended to turn their back to it, presenting blank facades and car parks to the increasingly vehicle dominated streetscape. Since the mid-eighties, large retailers and retail parks have boomed, occupying large 'shed and car park' developments that dominate stretches of the road. The Old

Kent Road is currently the dominant destination for comparison shopping within the borough.

Recent developments have tended to turn away from the road, presenting blank facades and car parks to the increasingly vehicle dominated streetscape.

Nevertheless, the area still contains some striking built form including pre-war industrial architecture, handsome landmark buildings fronting the street such as former public houses and public buildings, a range of traditional

Victorian streets and some Georgian terraces and Squares off the Old Kent Road. Parts of the historic high street that once ran the length of the Old Kent Road have remained more or less intact, the largest stretch running between the Bricklayers Arms roundabout, tailing into East Street, up until Burgess Park. This stretch of mostly Victorian terraces is home to a range of new and relatively well-established businesses, including general and specialist grocers, cafes, restaurants, churches, gyms, hair and beauty services, and community-based services.

Located in the high street hinterlands, a combination of industrial, storage and warehouse uses occupy the area. While some industrial uses have waned over time, a large number of business and jobs are still contained in these areas. Due to its proximity with Central London many of the businesses serve customers based in this location. Some of these businesses include commercial printers, taxi repair garages and new forms of workspace serving the creative industries, as well as a large number of faith uses.



Clockwise from top left

View from the Ledbury Estate overlooking the Old Kent Road. The large waste management centre is visible to the far left, with the towers of the Tustin Estate on the far right.

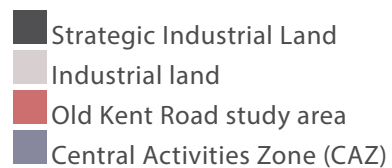
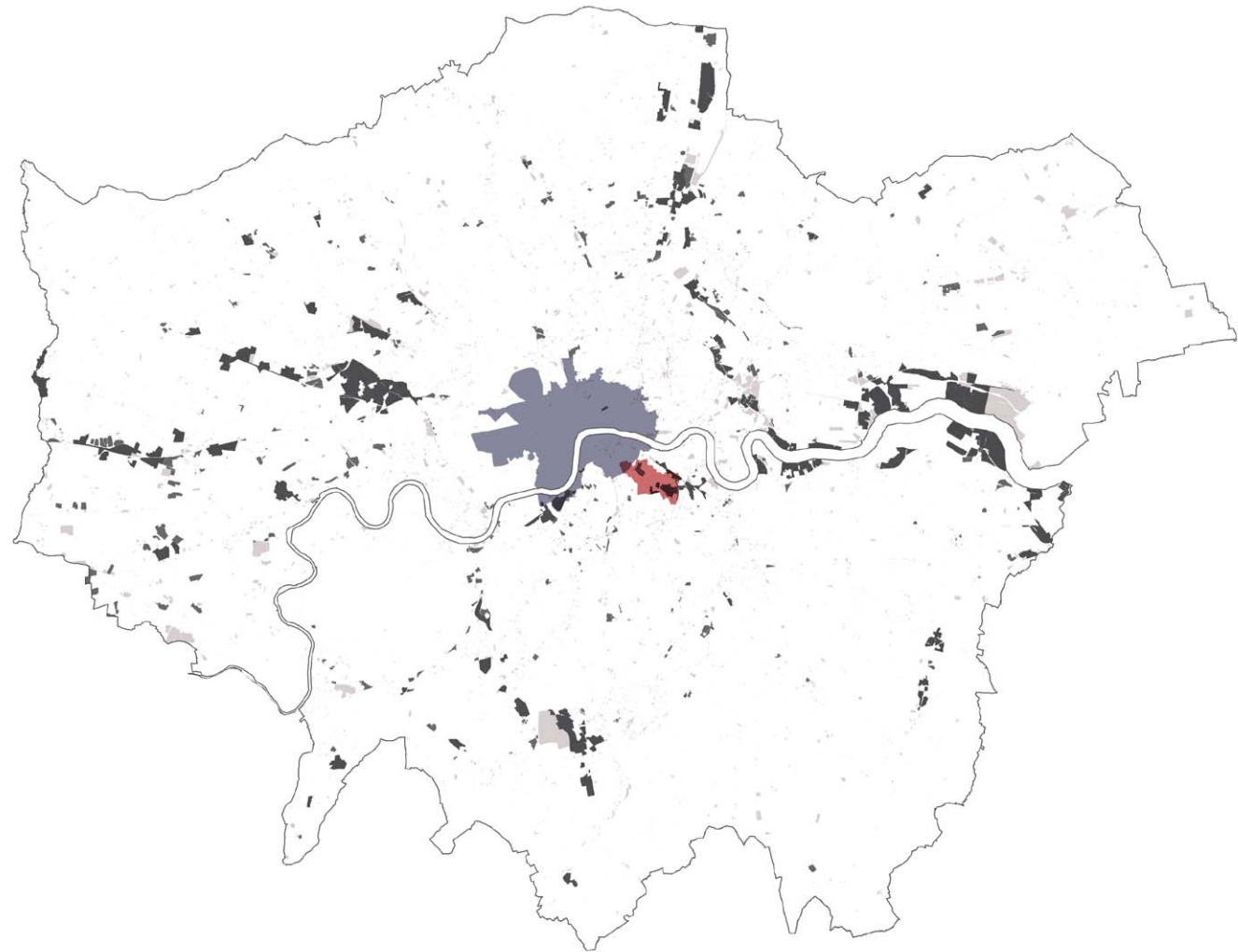
View from the Old Kent Road of the the Canitum Retail park.

Large industrial units of the Mandella Way Industrial Estate. View down Hatcham Road, one of the most densely occupied industrial areas in the Old Kent Road. Section of typical high street along the Old Kent Road.



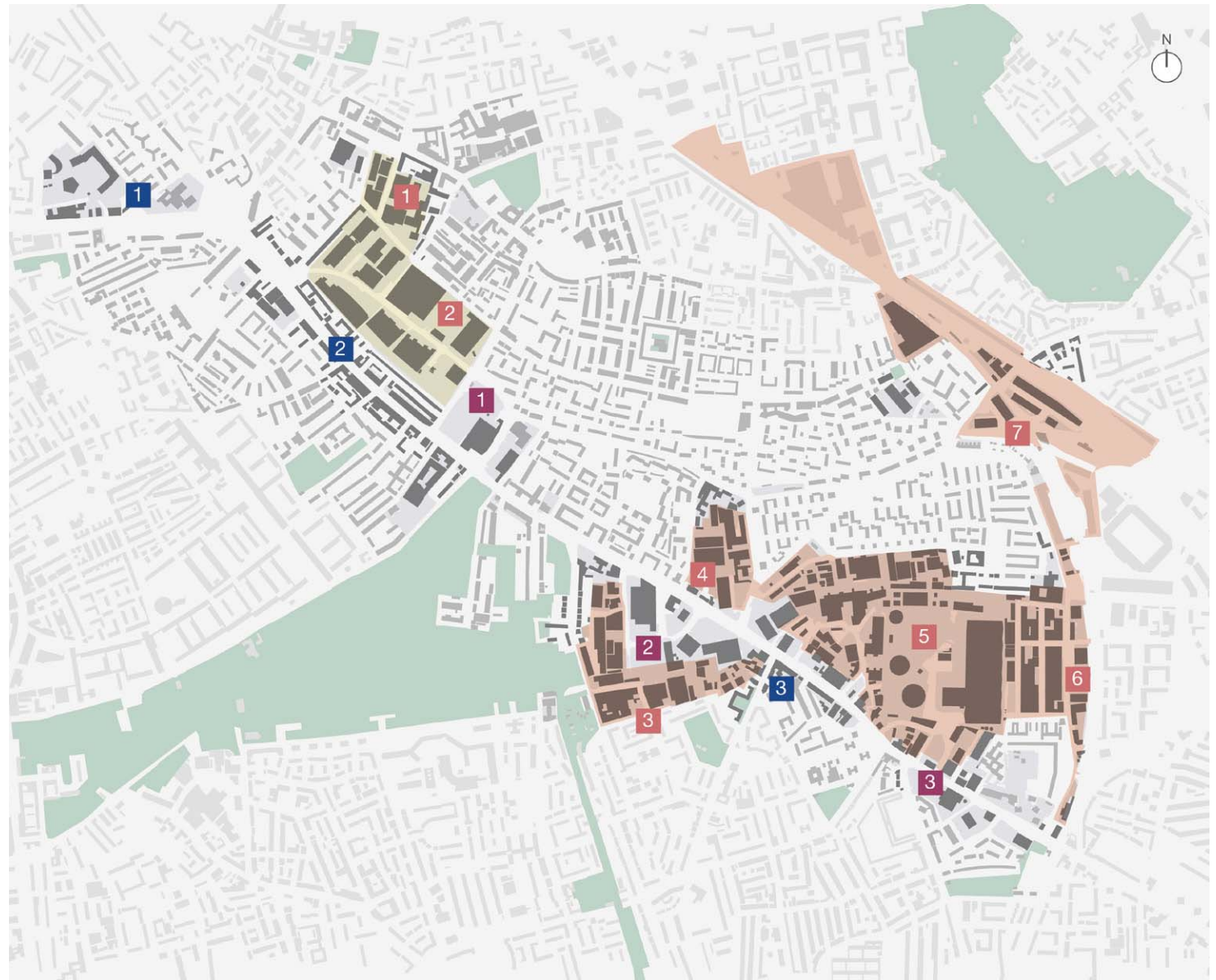
London-wide context

The highlighted area in red shows the study area. The Old Kent Road contains one of only a few remaining Strategic Industrial Locations, shown in dark grey, within inner London. Furthermore, with its good road and public transport access to the Central Activities Zone (CAZ), highlighted in blue, the Old Kent Road plays an important role in serving businesses located in the central activities zone and providing customers with a central location to gain access to services and goods.

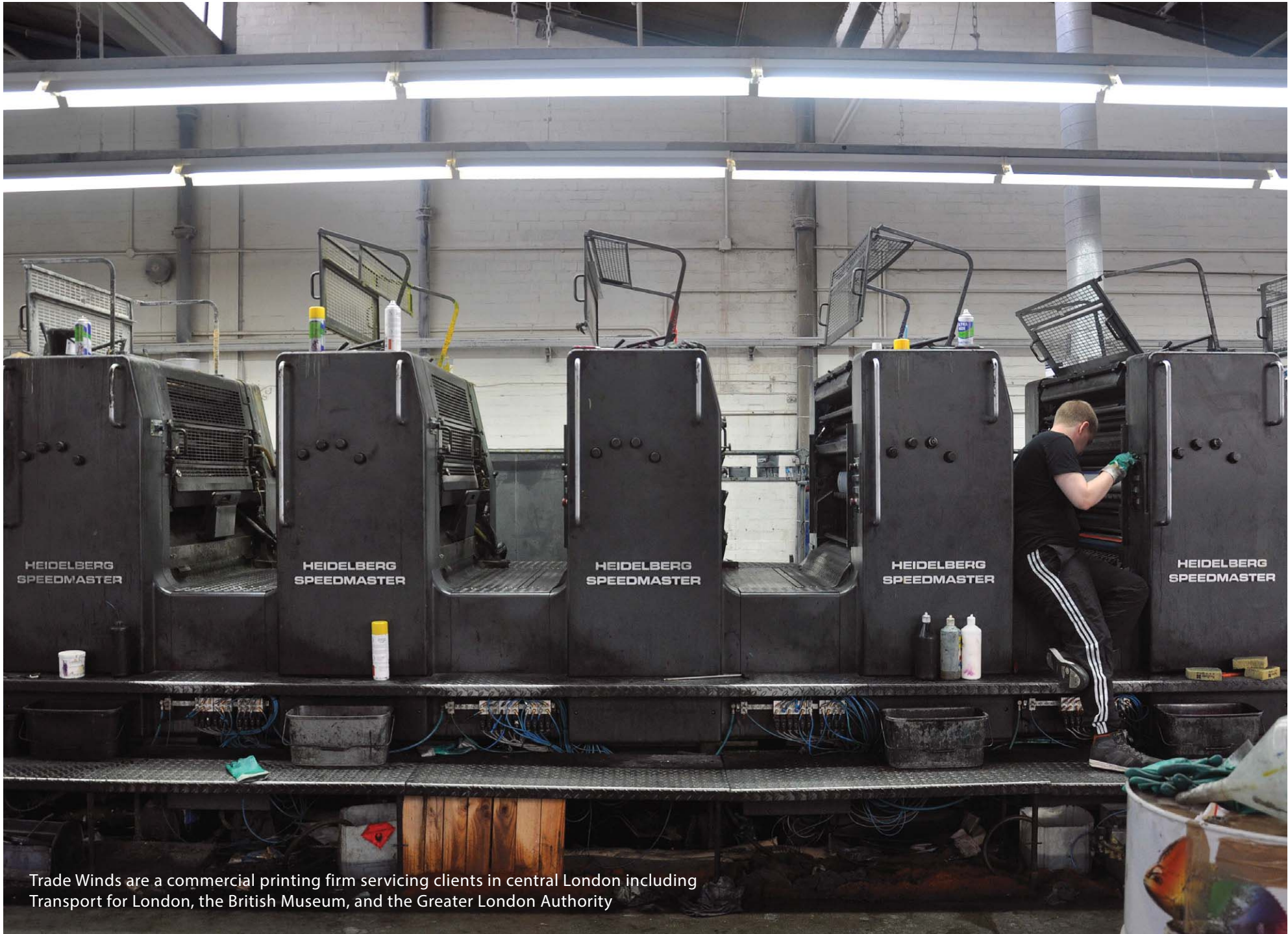


Key employment sites

The map highlights some of the key employment areas and key roads in the Old Kent Road. These include Mandela Way, a collection of large warehouses built in the 1990s, Glengall Road, and the industrial land around the gas holders. Much of this land is designated as Strategic Industrial Sites (SIL) or Locally Significant Industrial Sites (LSIS). Dotted between these are the retail parks - labelled in purple - and the High Street - labelled in blue.



■ Industrial areas	■ High Streets	■ Retail Parks	■ SIL designation
■ 1 Rich Industrial Estate	■ 1 New Kent Road	■ 1 Southernwood RP	■ LSIS designation
■ 2 Mandela Way	■ 2 Old Kent Road	■ 2 Cantium RP	
■ 3 Glengall Road	■ 3 Peckham Park Road	■ 3 Toys R' Us	
■ 4 Six Bridges Trdng. Estate			
■ 5 Gas Works			
■ 6 Ilderton Road			
■ 7			



Trade Winds are a commercial printing firm servicing clients in central London including Transport for London, the British Museum, and the Greater London Authority

Methodology

Using a mix of qualitative and quantitative research methods, the Old Kent Road Employment Study looks to reveal a detailed picture of the businesses, places and people that make up the local economy. Using maps, graphs, drawings and photographs, it provides a more nuanced understanding of how the Old Kent Road 'works'.

The study area covers 331 hectares and includes more than 1 million square meters of employment land.

The study began by defining the extents of the survey area. Spanning from the New Kent Road in the north to the borough boundary with Lewisham in the south the study area covers a substantial area, stretching across 331 hectares and more than 1 million square meters

of employment land. While some of the businesses are highly visible and public facing, many are tucked away at the back of the high street or hidden in the industrial hinterlands. It is these types of businesses, integral to the character of the area and important contributors to local economy, that are liable to be missed by purely desk based research. As a result, information was gathered using a door-to-door assessment and accompanying structured interviews. Officers mapped every business or employment use they found, as well as collecting data via the structured observational study below.

- Name of business
- Address
- Number of units occupied
- Phone number
- Web address / email address
- Primary activity
- Type of space occupied
- Estimated number of employees

Businesses were allocated a Standard Industrial Category code according to the main business activity occurring on site. This allowed researchers to place businesses within 1 of the 18 categories

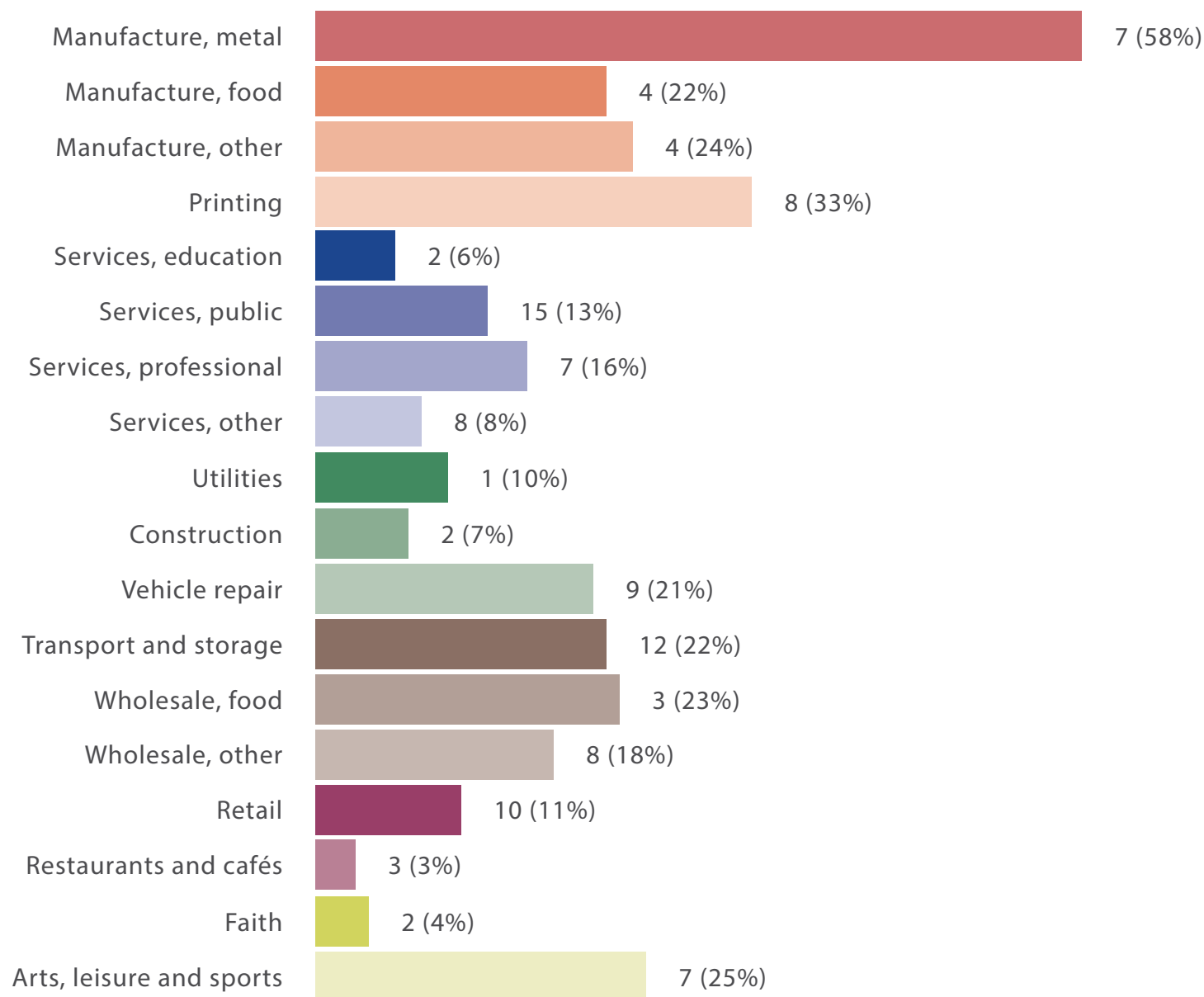
listed overleaf, and forms the basis for the analysis of business sectors.

Alongside this more quantitative audit, officers carried out a number of structured interviews with businesses. These interviews allowed the researchers to gain a more exact sense of what businesses are doing, and provided more detailed information on the number of employees, customer and supplier locations, as well as more qualitative information on individual business aspirations.

Officers also carried out a number of site surveys. These made a more generalised assessment of employment sites, looking at the quality and condition of buildings and neighbouring environment, ease of vehicle and pedestrian movement, and the quality of public realm. The site surveys allow for a more geographic analysis of the Old Kent Road economy, grouping together businesses and buildings into coherent sites.

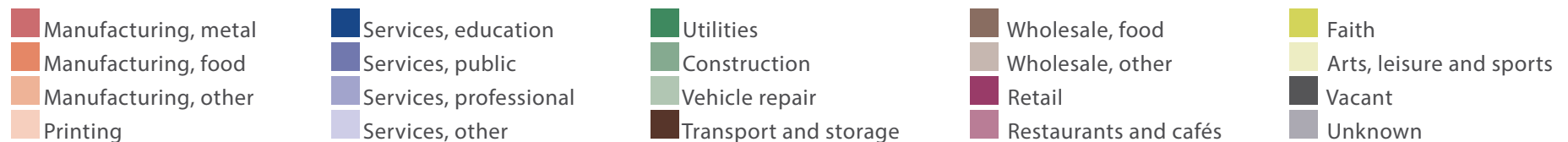
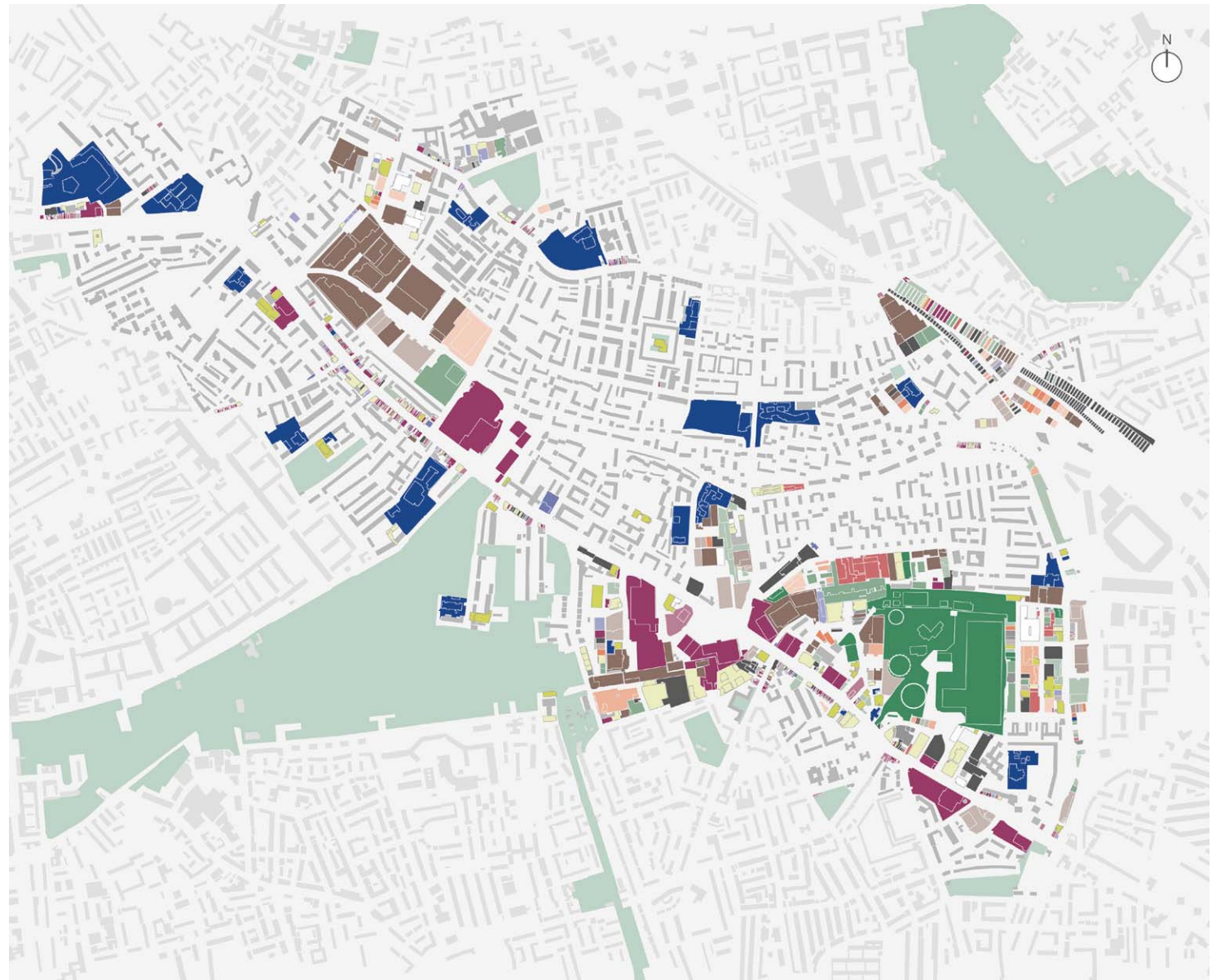
Interview rates

The graph and diagram opposite show the breakdown of the 18 business sectors used to classify business' activities, as well as the interview rates per sector. Exactly 100 of the area's businesses were interviewed (13% of all businesses), with high interview rates among manufacturing and wholesale businesses, but much lower rates in sectors such as retail, restaurants & cafes, service and faith. This was in large part due to the availability of businesses, with manufacturing and wholesale businesses tending to have the owner or floor manager on site during operating hours. By contrast, retail businesses and restaurants tend to be more minimally staffed, with the owner often not on site. Staff members tended to be busy serving customers and often did not wish to answer on behalf of the owner.



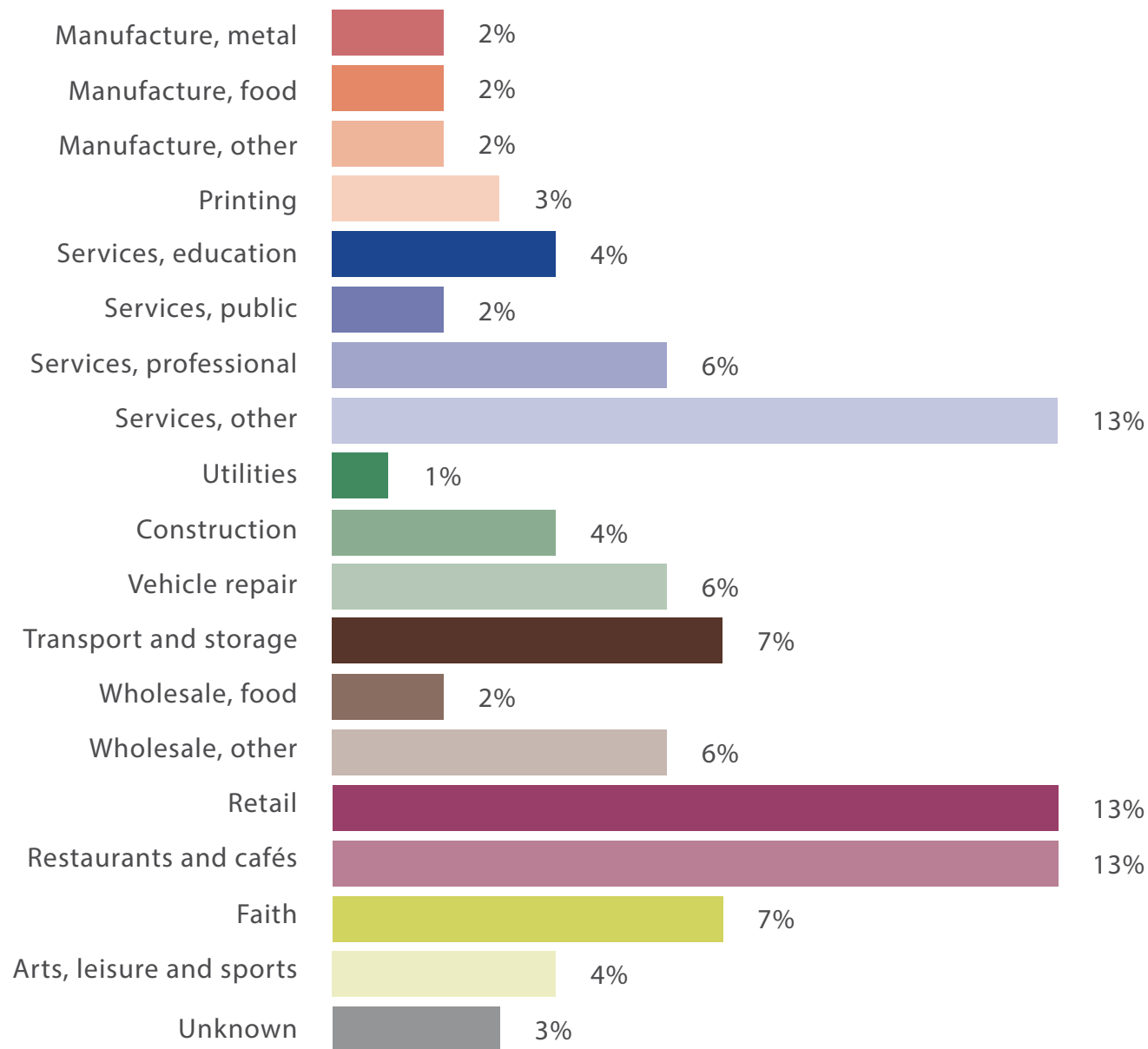
Business sectors

The larger patches of blue dotted throughout the study area are the area's 14 schools, while the green sites to the east are the Old Kent Road gas works and Soutwark waste management Refuse centre. Larger purple units located at the southern end of the study area are large retail warehouses, while the brown block to the northern end are the logistics business in the Mandela Way Industrial area. However, alongside these clearly visible larger units are a huge number of smaller units. Used in conjunction with the graphs opposite, the map starts to reveal the patchwork of sectors that characterise the Old Kent Road.



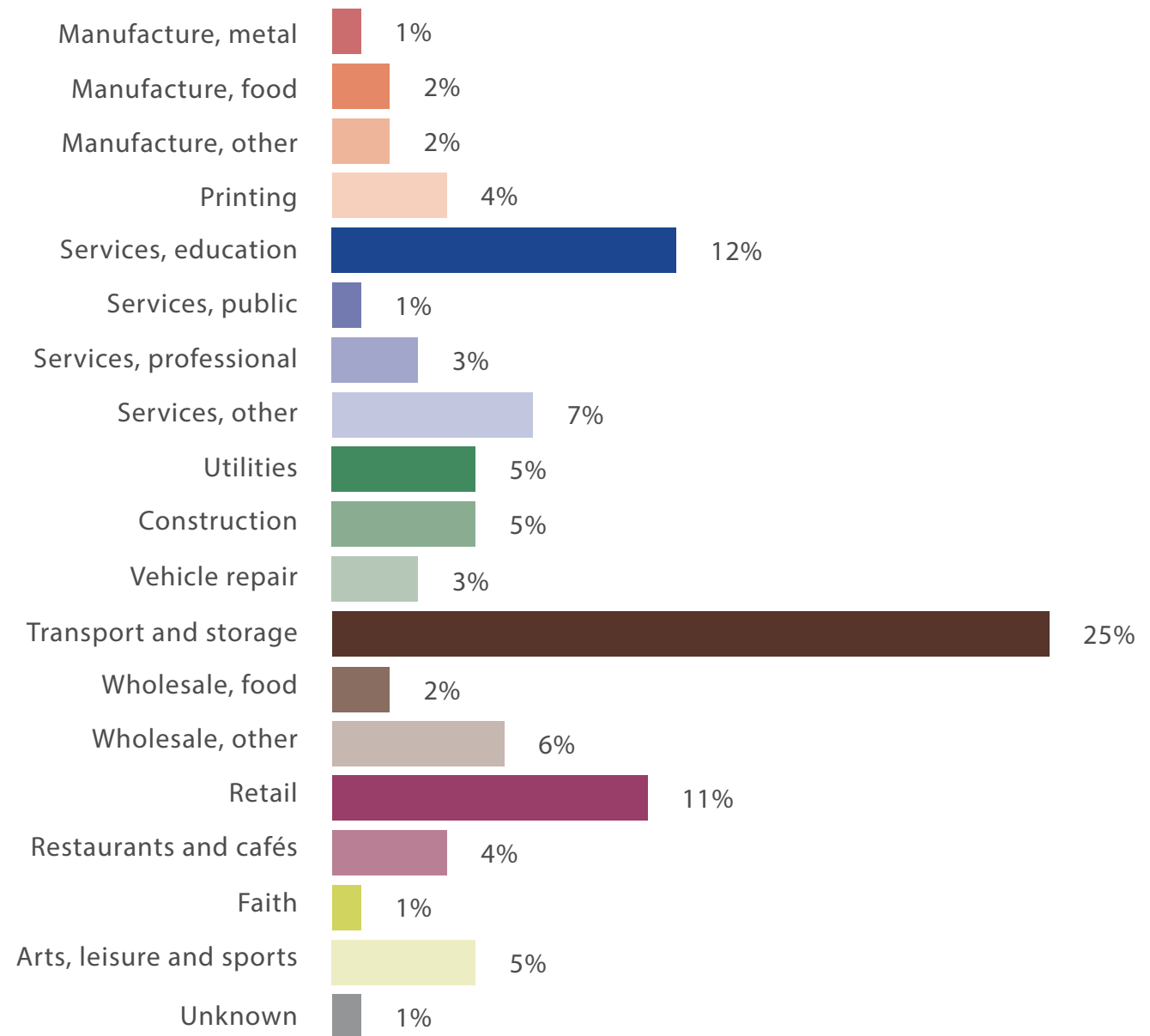
Businesses by sector

In terms of the number of businesses, Retail (26%) and Services (25%) are the clearly dominant sectors. This numerical dominance is mostly due to the sectors' strong presence on the high street which unsurprisingly houses a large number of small retail and restaurant businesses, as well as pharmacies, accountants and legal services, laundrettes, money transfer services and various repair shops. There is a relatively even distribution across the other sectors, although it is worth pointing out the large number of companies dealing with transport and logistics (7%), as well as a high number of churches and other faith establishments (55 in total, or 7% of all businesses).



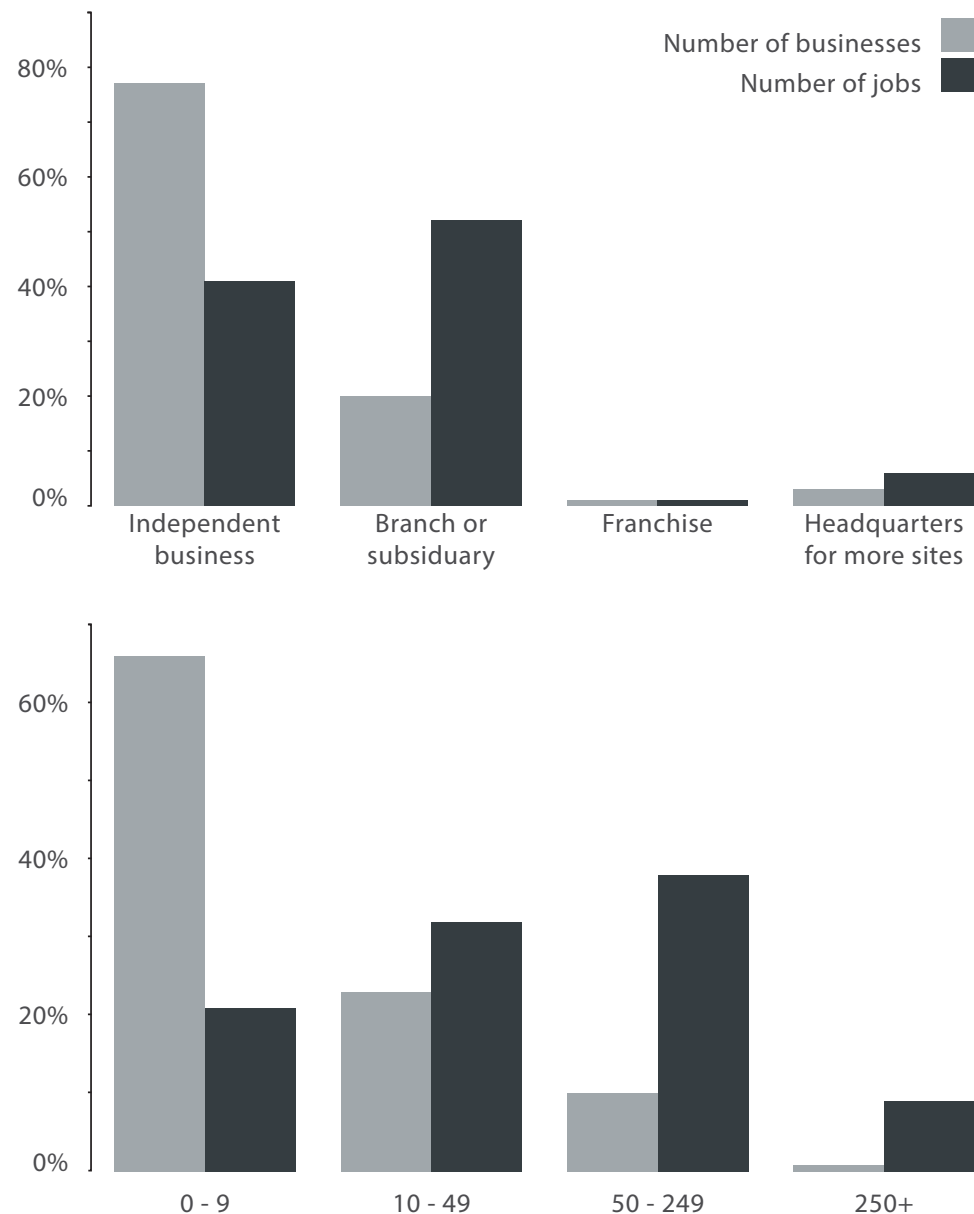
Jobs by sector

The graph opposite reveals that the largest employer, is the transport and storage sector (25%). A relatively small number of transport, haulage and courier firms - Royal Mail, Yodel, DHL, Transport for London - are important employers in the area. Services are another significant source of employment, with schools and education accounting for over 12% of all jobs. By comparison Retail, while dominant in terms of the number of businesses, has a much smaller share of the area's overall employment (15%).



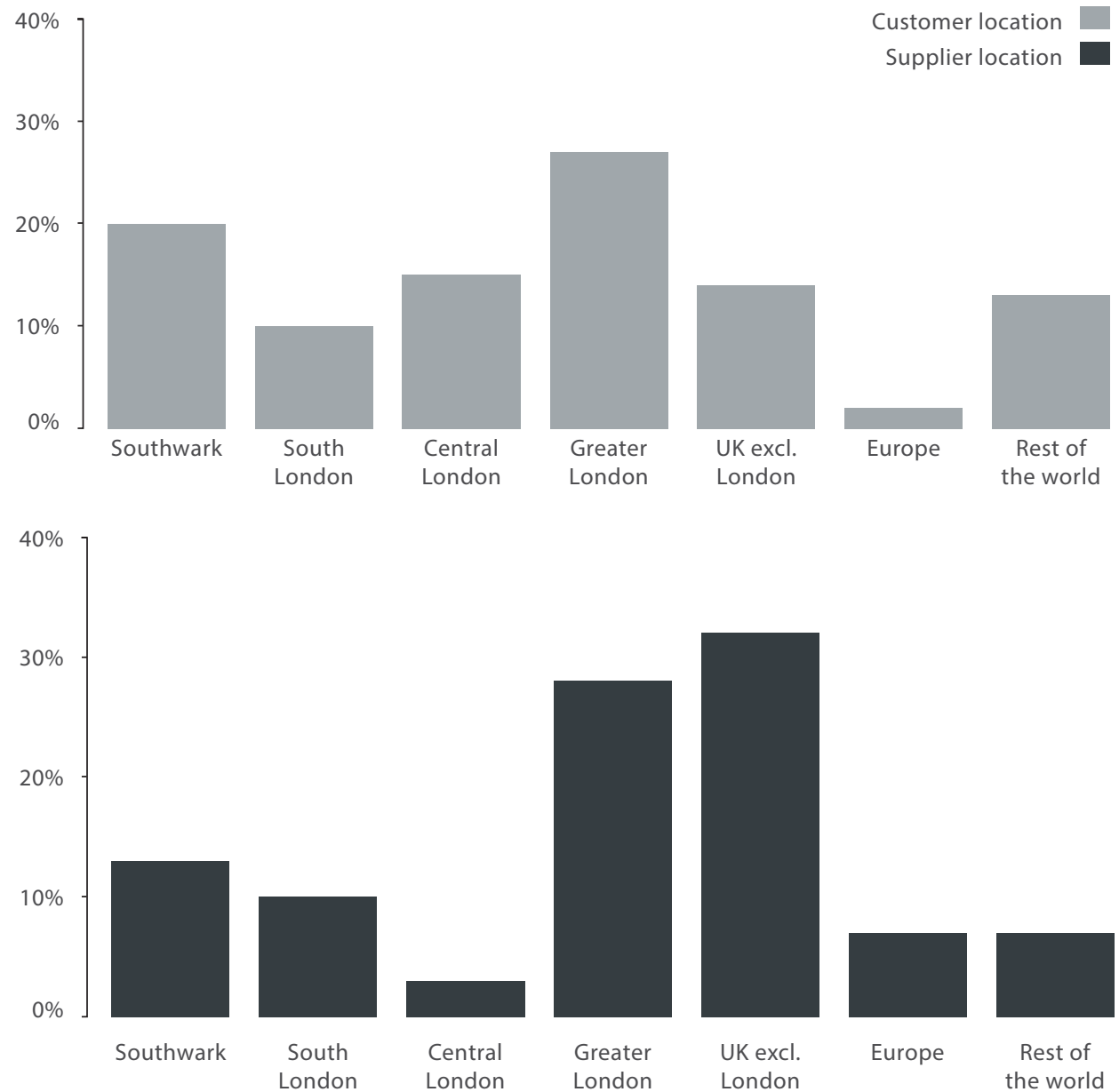
Business type and size

The top graph clearly shows the numerical dominance of independent businesses (77%), while the graph below highlights the large number of SME workspaces, with 99% of workspaces employing less than 250 people. The majority of these are micro-workspaces, employing less than 10 (66%). However, looking at the dark grey columns in the top graph it becomes clear that a relatively small number of branches and subsidiaries employ a large number of people (52% of all jobs). Similarly, a substantial number of jobs are generated by the larger workspaces, with 50% of the area's jobs generated by workspaces employing more than 50 people. While there are only 6 businesses employing more than 250 people (1% of all businesses), the employment generated by these space is substantial, making up 9% of all jobs in the area.



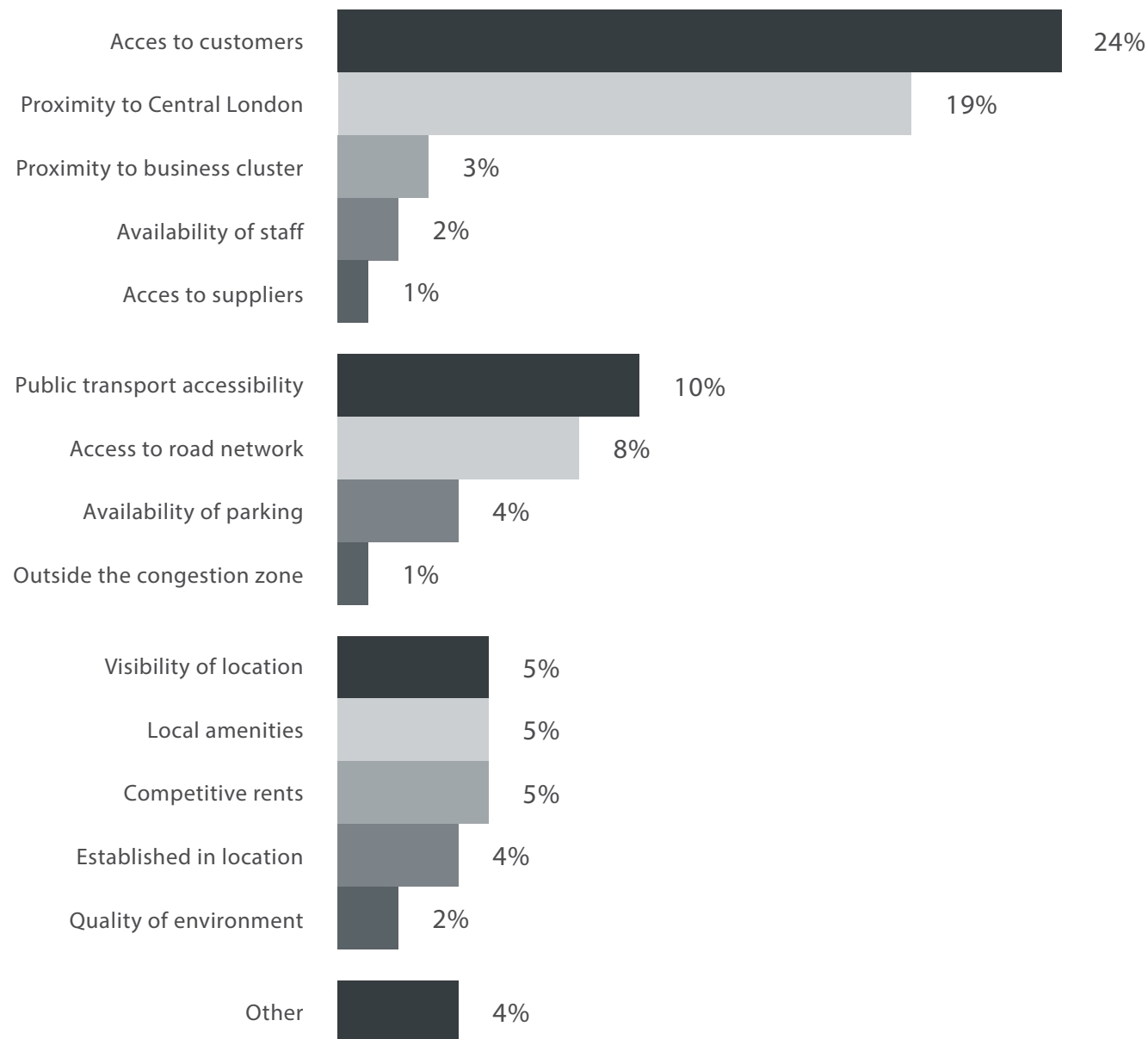
Customer and supplier locations

The lower graph shows the wide distribution of suppliers, with large amounts of materials and supplies being brought to the area from across London, the UK and abroad. By contrast, the customers of OKR businesses are clearly more local, with 72% of businesses identifying themselves as being primarily London-serving. Of these 20% identified themselves as serving a Southwark customer base, and 11% as serving the wider South London area. It is worth noting that 15% of businesses specifically identified themselves as serving customers based in Central London. There are numerous examples of the types of businesses providing services essential to the economic and cultural life of Central London, including the area's 24 printers, through to arts / events fabrication businesses specialising in serving the West End.



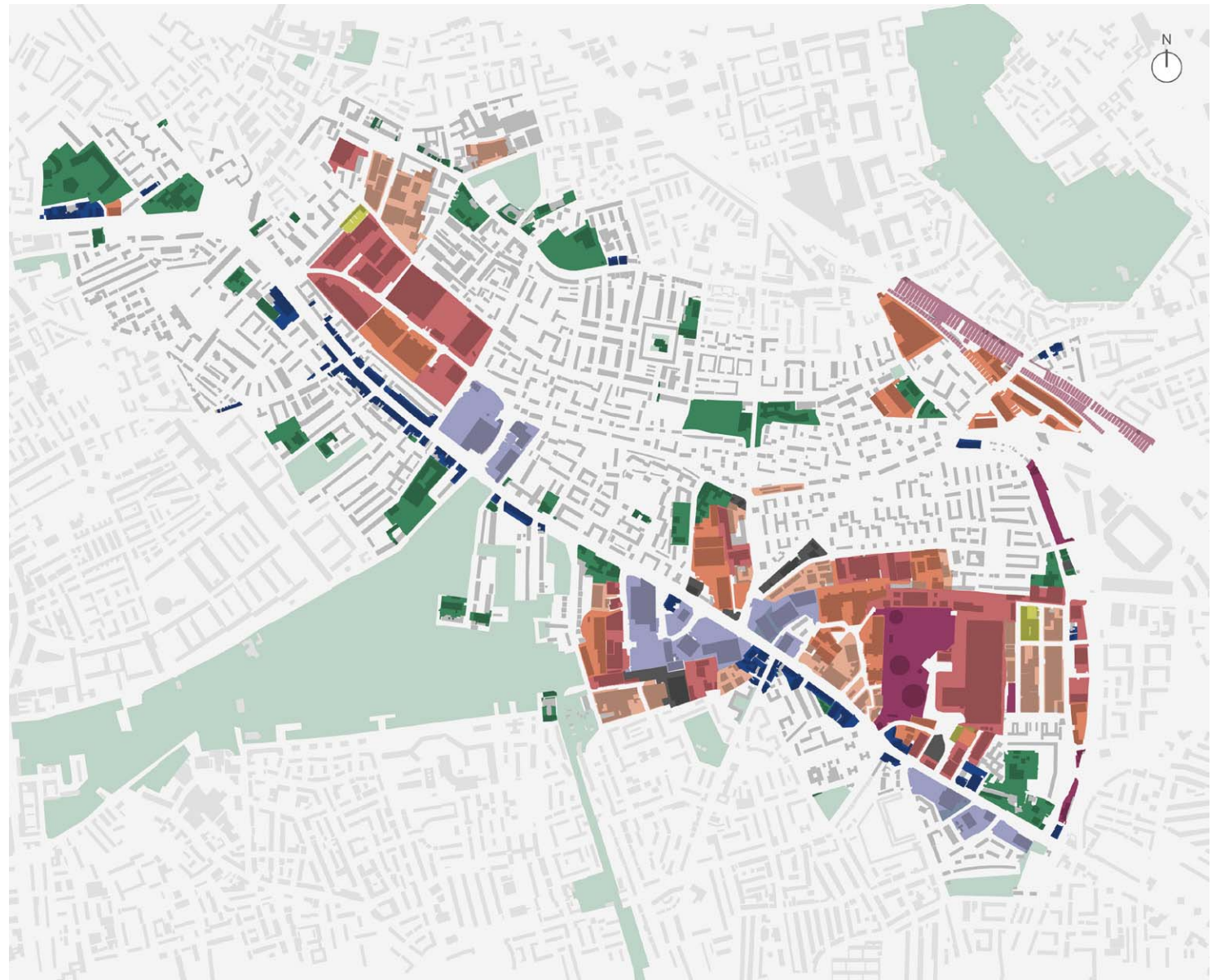
Benefits of location

Interviewees' responses further underlined the importance of the Old Kent Road's central location. While access to customers was given as a primary reason for businesses locating in the area (24%) the second highest response was around the benefits of the location's proximity to central London (19%). The third and fourth highest responses (public transport accessibility, 10%; access to road network, 8%) similarly reinforce the benefits of the Old Kent Road's inner London location for businesses. Other benefits such as the visibility of the location (5%), access to the amenities offered by the high street (5%) and competitive rents (5%) are also important factors in making the OKR attractive for businesses. However, read in conjunction the graph showing the importance of a Central London customer base, this graph starts to tell a story about the importance of the area's central location.



Site types

The map opposite shows the distribution of different site types across the study area, clearly highlighting the large blocks of industrial employment space at either end of the Old Kent Road. Located just off the Old Kent Road in areas behind the high street and retail parks, these areas are often considered as single monolithic blocks of industrial land. However, the map reveals a more subtle patchwork of different site types, ranging from modern single-user warehouses, managed industrial and office space, through to older industrial stock and railway arches. The fine grain of the high street (dark blue) is also clearly visible, while the coarser grain of the retail parks can be seen dotted along the length of the Old Kent Road.



Industrial sites

The maps and statistics presented opposite the significant scale of industrial land within the Old Kent Road, making up 60% of all employment land within the study area with Standalone warehouses taking up the highest proportion of space out of all the site types (23%). However, the figures also reveal the sometimes subtle distinctions between various industrial spaces. While often treated as homogenous industrial land, these sites provide a variety of space types which cater for a range of different spatial requirements. For example, Standalone warehouses tend to provide very large units, as well as large amounts of service and access space, reflected in the relatively low footprint ratio (54%). These tend to be modern, purpose built warehouses and are often occupied by large logistics firms, wholesalers, or utilities. While industrial estates are often of a similar age to their standalone cousins, they tend to provide much smaller units with businesses sharing amenity and servicing space.

The statistics also highlight the clear importance of industrial areas within the Old Kent Road, housing 47% of all businesses and 66% of employment within

the Old Kent Road. The distribution of employment across the five site types is revealing. Although the largest proportion of jobs sit within standalone warehouses (23%), the number of businesses based in these spaces is relatively low (5%). Occupiers tend to be larger nation-

Combined across the industrial site types vacancy rates are as low as 4%.

al companies employing large numbers of people within large units. While industrial estates and dense industrial sites have a slightly lower share of overall employment (22% and 17% respectively) both spaces tend to be used by a large number of smaller, independent employers. It is also important to note that their relatively high share of overall employment is achieved within a much smaller share of overall employment space. As we have already seen, industrial estates and dense industrial sites are character-

ised by smaller units and higher footprint ratios, due to shared amenity and servicing space. As a result, employment densities – the number of jobs generated per hectare - for industrial estates and dense industrial sites are almost double those of their larger standalone cousins.

Combined across the industrial site types (excluding the temporarily vacant railway arches), vacancy rates are as low as 4%. While this study can only ever be a snapshot in time and does not include a rigorous demand assessment, low vacancy rates go some way to suggesting that there is a high demand for industrial space within the area. Even including all vacant land, most of which can be said to fall within or close to industrial areas, the vacancy rate remains just under 7%. This compares favourably with a London wide average of 10% (GLA, Land for Industry and Transport SPG, 2012). While anecdotal evidence suggests that low vacancy rates can be partially attributed to recently displaced businesses from the South Bermondsey railway arches moving into the area, there is no evidence to suggest that these businesses will move back once construction work is completed.



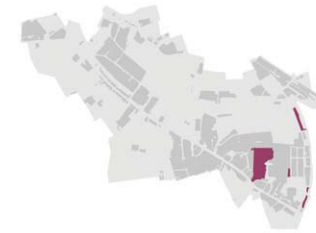
Standalone warehouse



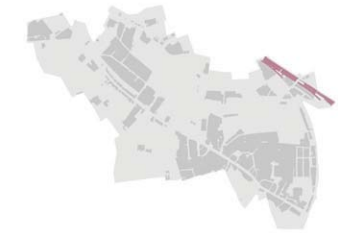
Industrial estates



Dense industrial



Open industrial land



Railway arches

<i>Number of sites</i>	16	14	18	5	3
<i>%age of total space</i>	23%	15%	14%	5%	3%
<i>Avg. unit size (sqm)</i>	2860	675	730	2710	170
<i>Avg. footprint ratio</i>	54%	60%	71%	11%	73%
<i>No. businesses</i>	36 (5%)	113 (15%)	148 (20%)	12 (2%)	23 (3%)
<i>No. employees</i>	2177 (23%)	2103 (22%)	1637 (17%)	88 (1%)	174 (2%)
<i>Avg. empl. density</i>	56	119	97	32	42
<i>Vacancy rate</i>	1%	4%	6%	0%	48%

Other sites

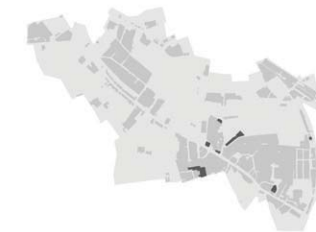
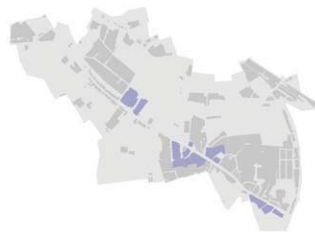
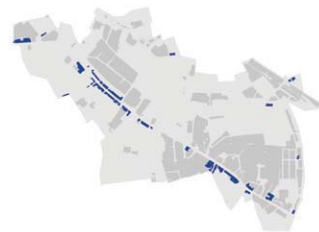
Across the other sites, community uses in residential areas and retail parks jump out as the largest occupiers of space. The former are mostly made up of schools and their associated yard space, while the latter are characterised by large retail sheds and customer parking. While both site types have low footprint ratio, it is worth noting that retail parks have the lowest footprint ratio outside of open industrial or vacant land. To put this in some sort of perspective, the space given over to customer car parking within the retail parks could comfortably accommodate the total combined floorspace of the area's 15 high streets. By contrast, high streets and business centres take up a much smaller proportion of overall employment space, and provide much smaller retail and office units respectively. Somewhat predictably, the high street is home to the greatest share of businesses (36%), and achieves the area's highest average employment densities (220). By contrast, retail parks support only a few large chain stores that, relative to the large amounts of space they occupy, generate very few jobs. This reflected in their extremely low employment densities (47) which is only fractionally higher than those found

in open industrial land. At first glance, vacancy rates for the high street (12%) would seem to be somewhat high for an inner London high street. However,

At the time of writing there were only 5 vacant retail properties along the Old Kent Road between Bricklayers Arms and Burgess Park, a vacancy rate of just 3%.

it is worth pointing out that at the time of writing there are only 5 vacant retail properties along the Old Kent Road between Bricklayers Arms and Burgess Park, a rate of just 3%. From Burgess Park onwards vacancy rates are consist-

ently higher, with anecdotal evidence suggesting that low footfall makes it more difficult for small retailers to operate in these areas. Finally it is worth briefly noting the relative absence of vacant land within the area. While there are a few vacant sites around the gas works, these tend to be relatively small with the largest measuring a little under 5000sqm.



High streets

Retail parks

Business centres

Residential areas

Vacant land

<i>Number of sites</i>	15	5	3	24	7
<i>%age of total space</i>	6%	11%	1%	20%	1%
<i>Avg. unit size (sqm)</i>	160	2760	400	1100	1170
<i>Avg. footprint ratio</i>	80%	43%	68%	57%	5%
<i>No. businesses</i>	272 (36%)	21 (3%)	51 (7%)	76 (10%)	0 (0%)
<i>No. employees</i>	1139 (12%)	695 (7%)	250 (3%)	1222 (13%)	0 (0%)
<i>Avg. empl. density</i>	220	47	170	84	0
<i>Vacancy rate</i>	12%	0%	7%	n/a	100%

Central Old Kent Road

Central Old Kent Road High Street continues from East Street to Burgess Park. This Part of the high street contains an attractive sequence of heritage assets including the Thomas A' Becket free house, The Old Fire Station (now Blue Mantle Fireplaces and Antiques) and the former Green Man free house, all of which are interspersed by the finer grained Victorian high street parades. In keeping with their prominent presence on the Old Kent Road, all three buildings have suitably diverse and illustrious histories.

The Thomas A' Becket, as well as being a well-known pub, was home to a famous boxing gym used by Sir Henry Cooper, British, European and Heavyweight Champion, between 1954 and 1968. Along with Joe Frazer and Sugar Ray Leonard, both of whom sparred in the gym, the pub also saw David Bowie rehearse his Ziggy Stardust and the Spiders from Mars act in the early 1970s. The Old Firestation, built between 1903-4 by the London County Council Architects Department, has a similarly important musical heritage as the site of the (in)famous Ambulance Station. Part punk venue, part anarchist squat, it

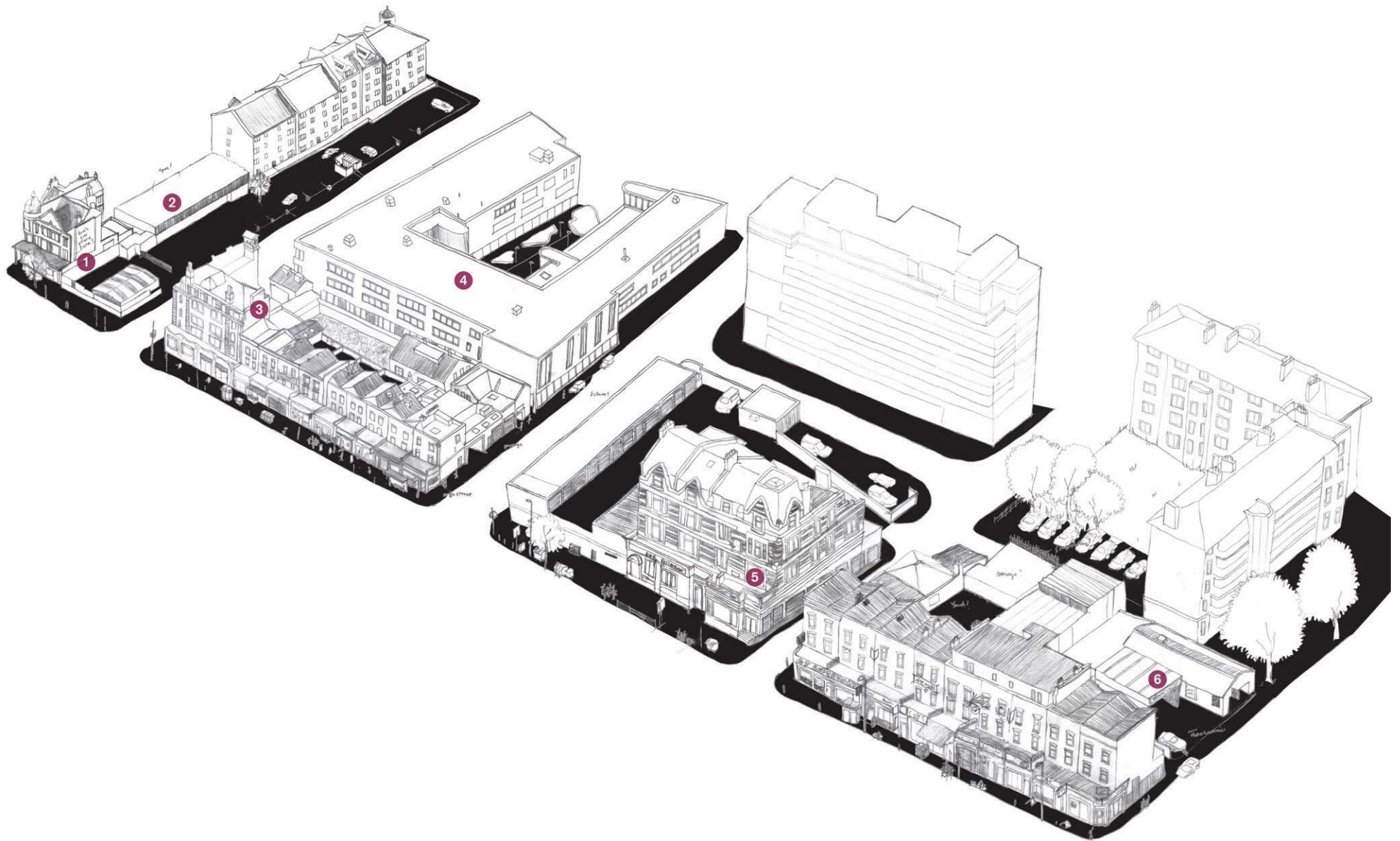
hosted performances from high profile bands performed at the venue including the Jesus and Mary Chain, Chumbawamba, Pulp and Primal Scream. The ground floor is now occupied by Blue Mantle, a company specialising in fireplace restoration. Finally, the Green Man,

30 businesses
208 employees
103 jobs per hectare
6% vacancy rate

now converted on the ground floor to a restaurant, has a history going back to the 18th century when a turnpike (toll booth) crossed the road between it and the Dun Cow. The Green Man closed in March 2008 and is currently being used as a nightclub and restaurant. With the Thomas A' Becket having recently lost its licence, the Lord Nelson pub remains the only currently active pub left on the Old Kent Road. While the majority of uses are to be found on the high street, there are a number of businesses located in

the high street hinterland. The largest of these is the Walworth Academy, a co-ed secondary school. Other businesses include a number of vehicle repair and MOT centres, builders yards, and barber shops, most of which are housed in Victorian brick buildings and sheds.

Although the leisure uses associated with this part of the Old Kent Road may have declined somewhat, the area is at least well served with green space. At 56 hectares, Burgess Park is Southwark's largest park. Burgess Park is unique in so far as it is a young park, developed as a result of the Abecrombie Plan for open spaces in 1943. The area was home to factories, densely populated streets and the Surrey Canal, much of which was badly damaged by bombing during World War II. The park was built between the 1950s and 1980s, and named after Councillor Jessie Burgess, Camberwell's first woman Mayor. In 2012 Burgess Park re-opened after an £8m transformation which improved the park's layout and landscaping, as well as providing improved sports, fitness and other recreation facilities.



- 1 The Thomas A' Becket
- 2 Mad House Tyres
- 3 Blue Mantle / former fire station
- 4 Walworth Academy
- 5 Former Green Man public house
- 6 Garages at back of high street



Clockwise from top left
The former Thomas A'Becket public house. The first floor was once home to a boxing gym.

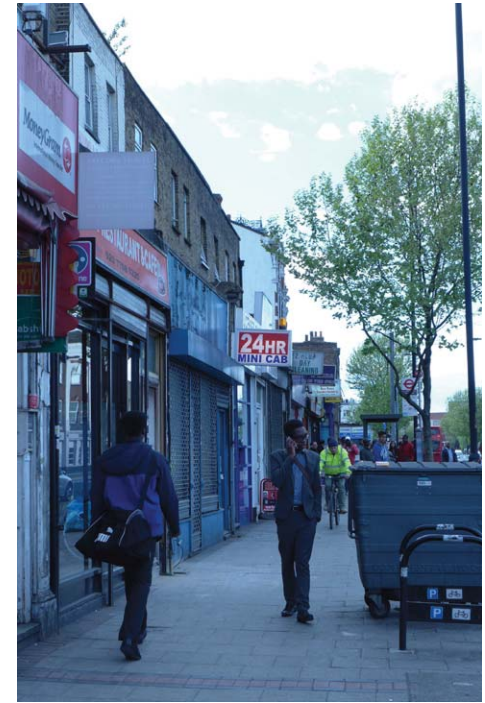
View of western side of Old Kent Road high street, showing typically dense occupation with retail on the ground floor and office uses above.



The former Dun Cow public house, now a GP surgery of the same name. Sign for the GP surgery. The former Green Man Pub, now part vacant.



View across Burgess Park towards the Aylesbury Estate.



Blue Mantle

Based in a Grade II listed former fire station, Blue Mantle is one of the UK's leading suppliers of antique and reproduction fireplaces. Established in 1969 they claim to have developed one of the largest antique fireplace showrooms in the world, with somewhere in the region of 500 items on display at any one time. Rows of restored and replica fireplaces with beautiful marble, wood, stone and cast iron surrounds, as well as stoves, statues, mirrors, fireplace accessories, and the general miscellany of architectural salvage, crowd into the ground floor showroom. Sitting behind this orchestrated chaos is the more genuine chaos of Blue Mantle workshop. It is here that the fireplaces begin their transformation from battered cast-offs to treasured antique. Such spaces remind one that 'making' has never been limited to industrial areas, but can exist and thrive in the forgotten back spaces of our high street.

Fireplace restoration

Established 1969

4 employees

20 years at location

Benefit from visibility of their location

South London customers

Restore an average of one fireplace every day



Old Kent Road Gas Works

Head beyond Burgess Park, and you see the traditional high street start to dissipate. Post-WWII redevelopments such as Avondale Square saw the demolition of many of the surviving Georgian and Victorian terraces. However, more lasting damage has been done by the arrival of several large retail parks in the late 80s and early 90s. Failing to address the street with anything more than blank end walls and car parking sprawl, they create an unremittingly bleak landscape. There are some surviving highlights, including the former North Peckham Civic Centre, a 1960s civic building wrapped in a jolly ceramic mural depicting scenes from the history of the Old Kent Road.

However, by the time we reach the start of the pictured site the high street condition has more or less petered out. A pair of facing Victorian terraces are the final pieces of high street before crossing the borough boundary into Lewisham. The western row is actually doing quite well, benefiting from the narrowing of the Old Kent Road to four lanes of traffic, wider pavements and two mature London plane trees. Proof of the tangible change this brings about can be found in the choice of one café to regularly provide

outdoor seating, one of only 3 cafés and/or eating establishments along the entire Old Kent Road that regularly give its punters this option. The Grade II listed former Kentish Drovers Pub (currently the New Saigon restaurant) is an attractive corner building, featuring an unusual mural depicting drovers in a landscape. Across the road, the facing terrace has fared considerably worse, with a large number of its ground floor units currently vacant and the residential units above in an advanced state of disrepair. Two recently pinned up signs above the vacant units ('Untitled Ltd' and 'Bob's Abandoned Bikes') bring a much needed touch of gallows humour.

Wrapped around this high street fragment is the ten hectare Gas Work site, currently occupied by three remaining gas holders, a small industrial estate, and the gargantuan Southwark waste management centre, completed in 2011. It is one of the few places where the industrial hinterland becomes the vorderland, emerging from behind the high street and retail parks to make direct contact with Old Kent Road. The gas holders, the oldest of which dates back to the 1870s, are perhaps one of the few 'iconic' structures along the Old Kent Road, their

sheer size and longevity helping them to bludgeon their way into the area's collective consciousness.

Moving down the Old Kent Road to-

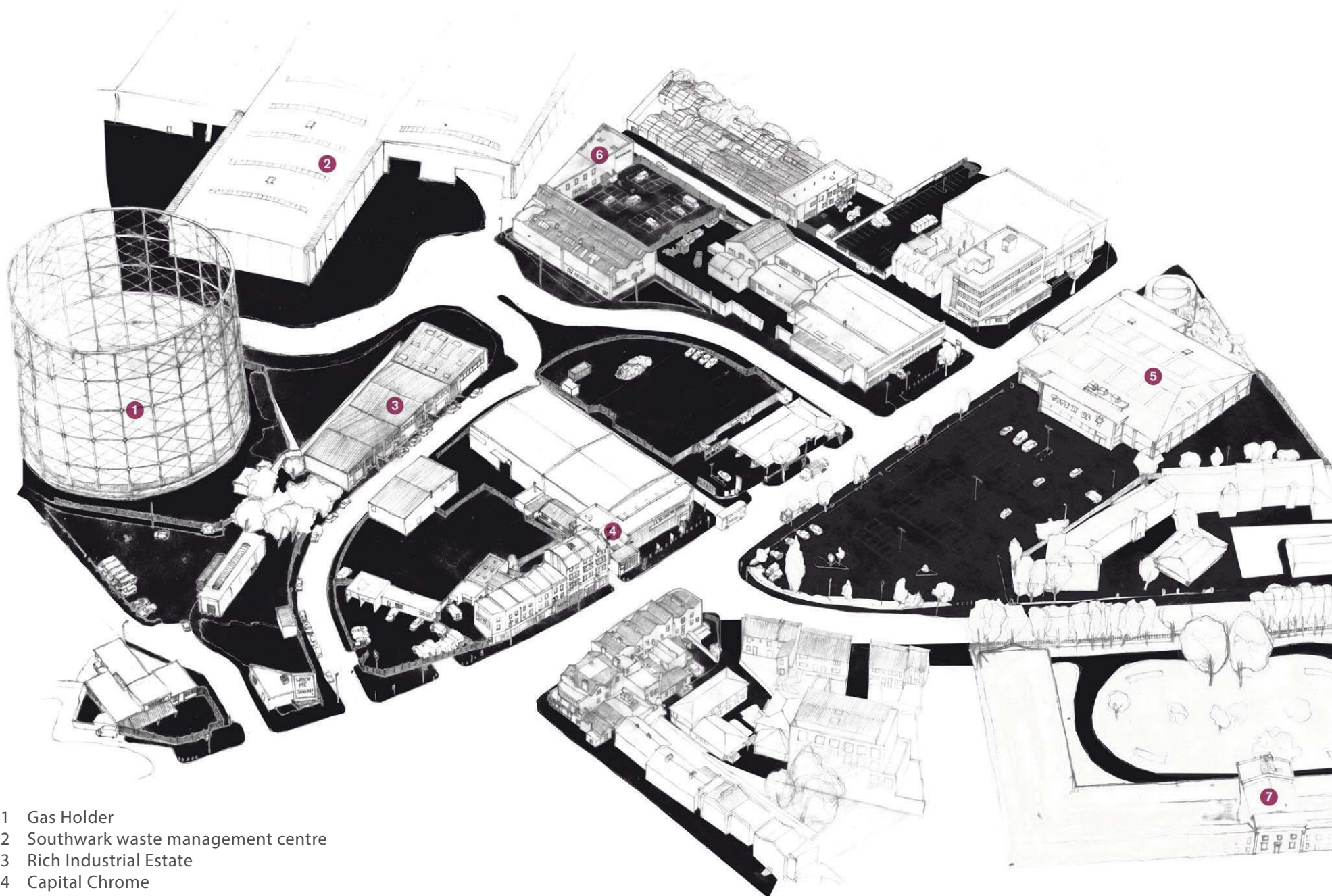
56 businesses

541 employees

41 jobs per hectare

4% vacancy rate

wards the borough boundary, the road is marked by a series of undistinguished buildings, progressing in a depressing parade of increasingly inefficient land uses. These include a petrol station, a series of warehouses, and concluding with the Toys R' Us shed, a retail park extravaganza complete with neon sign and 7,500sqm of customer parking.



- 1 Gas Holder
- 2 Southwark waste management centre
- 3 Rich Industrial Estate
- 4 Capital Chrome
- 5 Toys R' Us
- 6 Daisy Business Park
- 7 Caroline Gardens



Clockwise from top left

Old Kent Road gas holders. Entrance to the Southwark waste management centre. Small remaining high street surrounded by the gas works site. While many units are well maintained a number are vacant and in a poor state of repair.

Entrance to the former Mothercare Store. View down part of the remaining high street.

Shed and car park of Toys R' Us, with the towers of the Tustin Estate visible in the background.



Capital Chrome

Hidden in a scruffy looking building is a chemistry lab like no other on the Old Kent Road. 1000 litre tubs of chromic and sulphuric acid, as well as vats of bubbling blue copper sulphate fill the basement workshop of Capital Chrome, an electro-plating business. Electro-plating is a chemical process used to apply a thin layer of chromium to an object. Capital Chrome take on a huge variety of jobs. However, they have developed a particularly loyal customer base among vintage car and motorbike restorers, a market with an almost unquenchable thirst for all things shiny. At the time of our visit, the workshop is filled with parts from a vintage Ferrari, already coated and being polished to a mirror sheen. While London's industrial areas are full of seemingly unlikely connections, it is all the more satisfying to draw a connection between this unglamorous stretch of the Old Kent Road, and the car showrooms of west London and Surrey.

Electro-plating

Established 2014

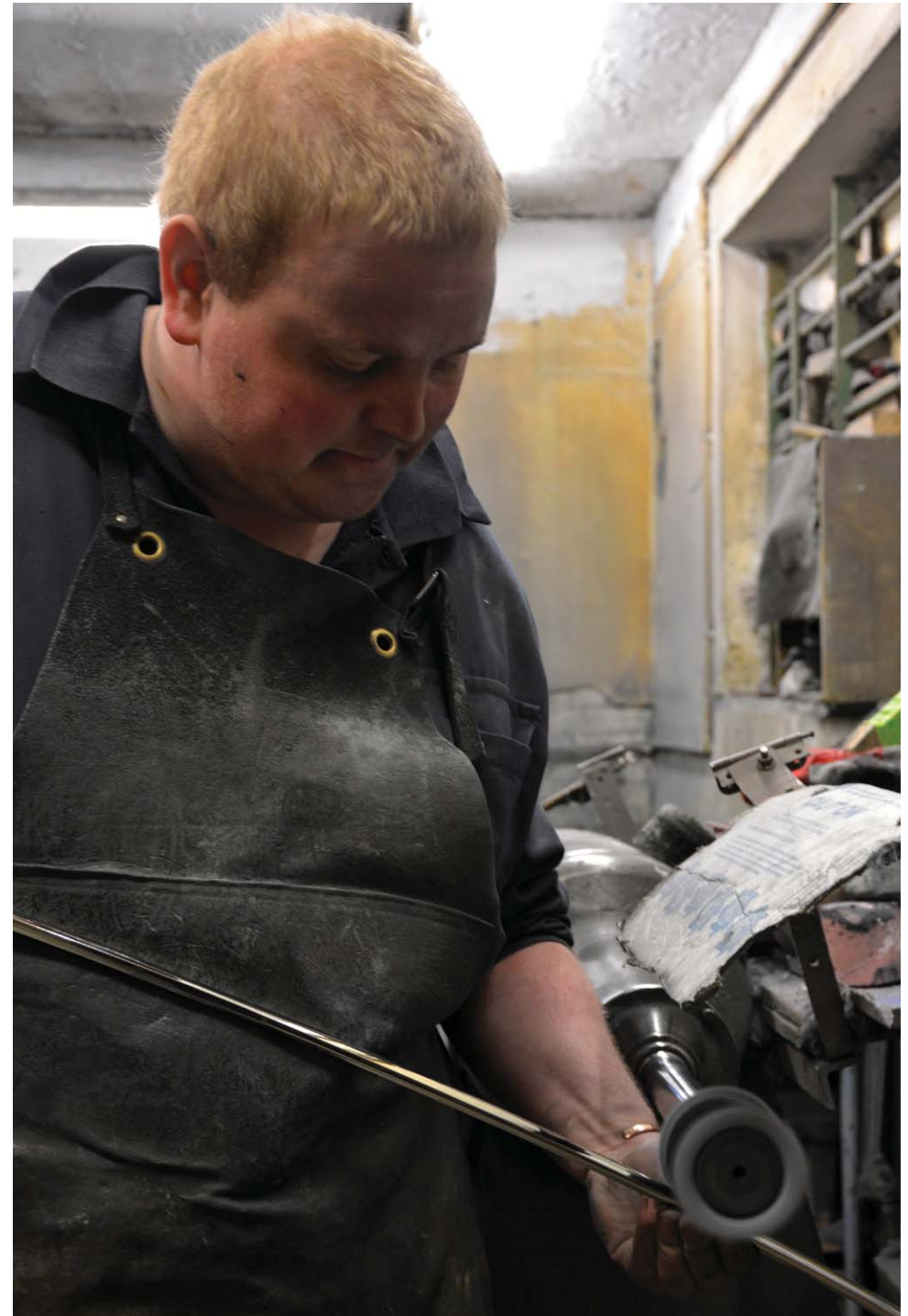
8 employees

1 year at location

UK-wide customer base

Benefit from easy access to the road network

Specialise in chrome work for vintage cars and motorbikes



Hatcham Road

The Hatcham Road Industrial area is made up of four urban blocks and a narrow strip of land running between Ormside Street and Southwark's waste management centre behind it. Three of the blocks are characterised by a mish-mash of post-war industrial units, built after heavy bombing aimed at the nearby gas works, rail depot and chemical factories along the Surrey Canal destroyed much of the modest worker housing formerly on the site. One of the blocks is now made up of the Pe-

60 businesses

493 employees

98 jobs per hectare

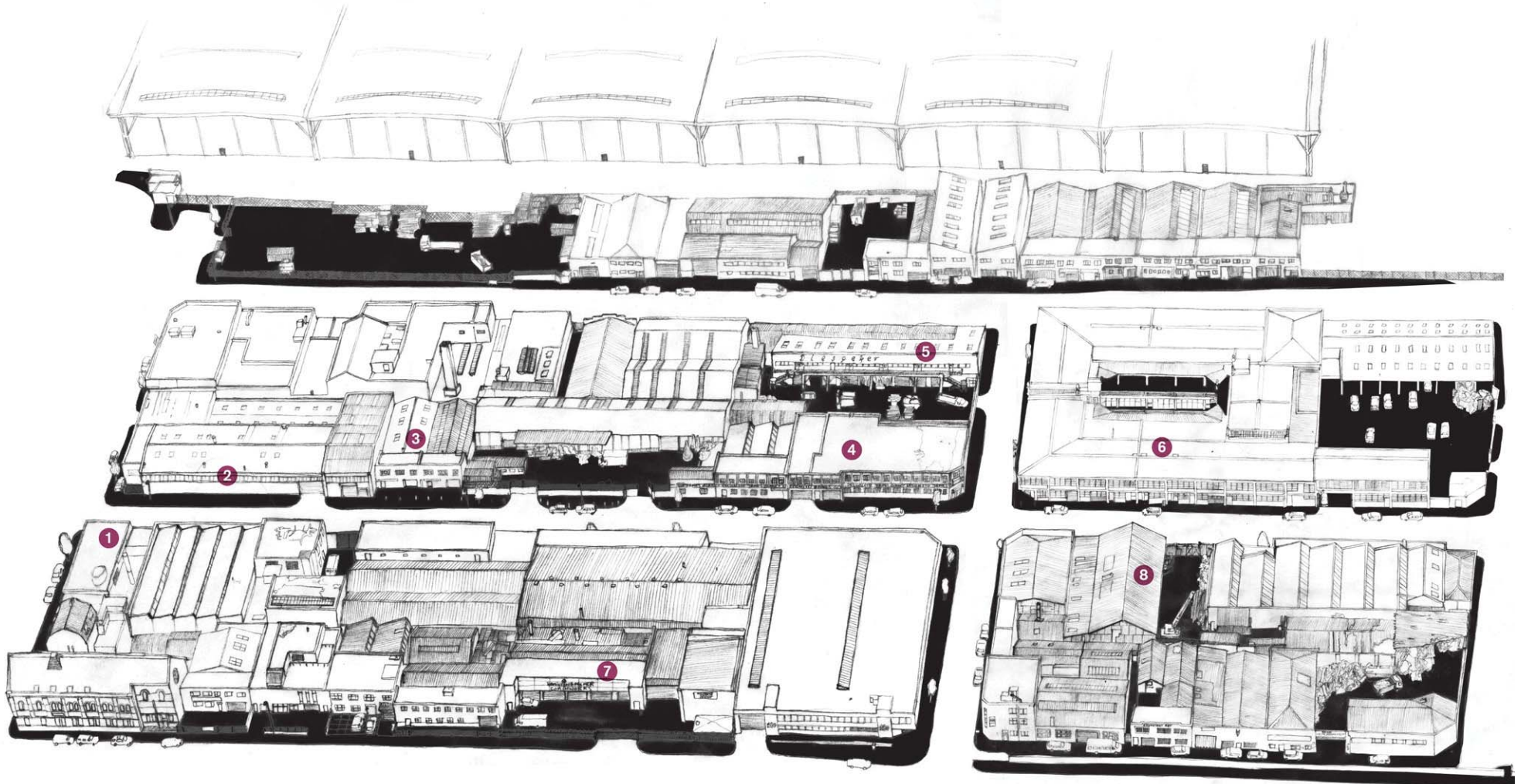
11% vacancy rate

narth Centre (top right of the drawing), a business centre built in the 1980s. The area is bounded by Southwark's waste management centre to the west, the Tustin estate to the south and Ilderton Road / the railway line to the west. To the north of the site Ilderton Road rises to meet the bridge that once crossed Surrey Canal.

The site is characterised by extremely densely packed units, with numerous alterations, subdivisions and extensions taking place over the years. An example of this can be found in Diespeker, a stone cutting firm who have recently extended their premises over the top of their 1940s warehouse unit (see photo on following page). The area is characterised by narrow streets, with the majority of units having little to no formal external yard space, visible in both the drawing and the high footprint ratio. While this allows for a human scale, one in which the activities happening within the warehouses are often visible from the street, it also results in heavy use of the curbside area for parking, informal working, and waste storage. Many businesses suffer from access problems, struggling to find space to conveniently load and unload vans. The near constant traffic along Ilderton Road is also a growing concern for some businesses.

While some businesses are highly visible, the area can feel slightly deserted at times. However, although vacancy rates are slightly high, there are in fact a large number of businesses and employees packed into relatively small space, reflected in the area's high em-

ployment density. In particular, there are a cluster of metal-working related businesses (some which are profiled in the following pages), as well as artists and creative sector businesses. There are also a particularly large number of faith establishments (14 churches and 1 mosque), with 8 churches in the Penarth Centre alone. In a characteristic feature of the Old Kent Road, only one of these 15 faith establishments is based in a purpose-built faith building. While there are some tensions between faith and business users - particularly around the perennial issue of parking - the churches succeed in bringing life to the streets at times which businesses are not generally using their premises.



- 1 Trade Winds Ltd
- 2 Purpose Powder Coating
- 3 Flux Metal
- 4 James Glancy Design
- 5 Diespeker
- 6 Penarth Centre
- 7 Hamiton & Palmer Coachworks
- 8 Thompson & Son



Clockwise from top left
Internal courtyard of the Penarth Centre business centre. While often empty during the week, the 8 churches based here mean the centre is extremely busy at the weekend

View down Orsman Road.

Interior of 180 Ilderton Road, a formerly vacant warehouse on the corner of Ilderton Road and Penarth Street. Since visiting, the space has been refurbished as artists' studios by V22 Studios.

View down Ilderton Road.



Thompson & Son

Thompson & Son are a company specialising in the manufacture and refurbishment of hydraulic valves and presses. While there are many businesses along the Old Kent Road that make a show of their historic links with the area, we imagine few can compete with the deep roots found in Thompson & Son. Moving to Hatcham Road in the mid-1930s, the company began specialising in the manufacture and refurbishment of hydraulic presses, a line of work that current owners Andrew and Bill Thompson have continued to this day. The crowning highlight of our tour comes with the hoisting of a 20 foot piston. As with all things in Thompson & Son this piston has a history, having previously been used on German battleship that was scuttled at Scapa Flow, following the German surrender at the end of World War I.

Hydraulics resoration

Established 1888

2 employees

80 years at location

London-wide customer base

Benefit from having being located in the area for a long time

Oldest continuously operating business on the Old Kent Road



Flux Metal

They are the great unsung heroes of the modern art world: the fabricators. Their names never appear on gallery labels, and yet it is they that transform the casual doodle into the installation pieces we admire. Flux Metal, a metal-work business specialising in commissions for artists, events, and public projects, have no complaints about their lack of public profile. They are known well enough in the circles that matter. Founded by James Garner in 1996, their back catalogue is impressively diverse, with commissions ranging from the enormous - giant, flaming bat-symbols and installations at the Tate Modern - down to (slightly) more everyday objects - bronze beer taps and a Piranha bar sign. What seems to unite these various commissions is that their one-of-a-kind nature. At the time of our visit, they are working on an "Iron Long" to be used as a prop for the musical 'City of Angels'.

Metal fabrication

Established 1996

4 employees

8 years at location

*Central London
customer base*

Benefit from proximity to

Central London

*One of only 3 companies in
the UK with a similar
specialism*



Purpose Powder Coatings

Based in one of Hatcham Road's larger warehouse units, Purpose Powder Coatings is a company specialising in powder coating services to industry across the South East of England. Powder coating is a type of dry coating, which is applied as a free-flowing, dry powder to mostly metal products in order to give them a protective layer. Products are dangled from a snaking conveyor belt contraption, which slowly takes them through various stages of cleaning and coating. Originally founded in 1939 as Purpose Products, and based in Islington, the company takes on a wide range of work with major commissions including the complete powder coating of all the cable trunking for the Post Office Tower. At the time of our visit, the commissions are somewhat smaller but interestingly include a steel frame for a stage, sent over by local decking company Steeldeck.

Powder coating specialists

Established 1939

15 employees

50 years at location

UK wide customer base

Easy to find skilled workers in the area

Powder coated all cable trunking in the Post Office Tower



Rich Industrial Estate

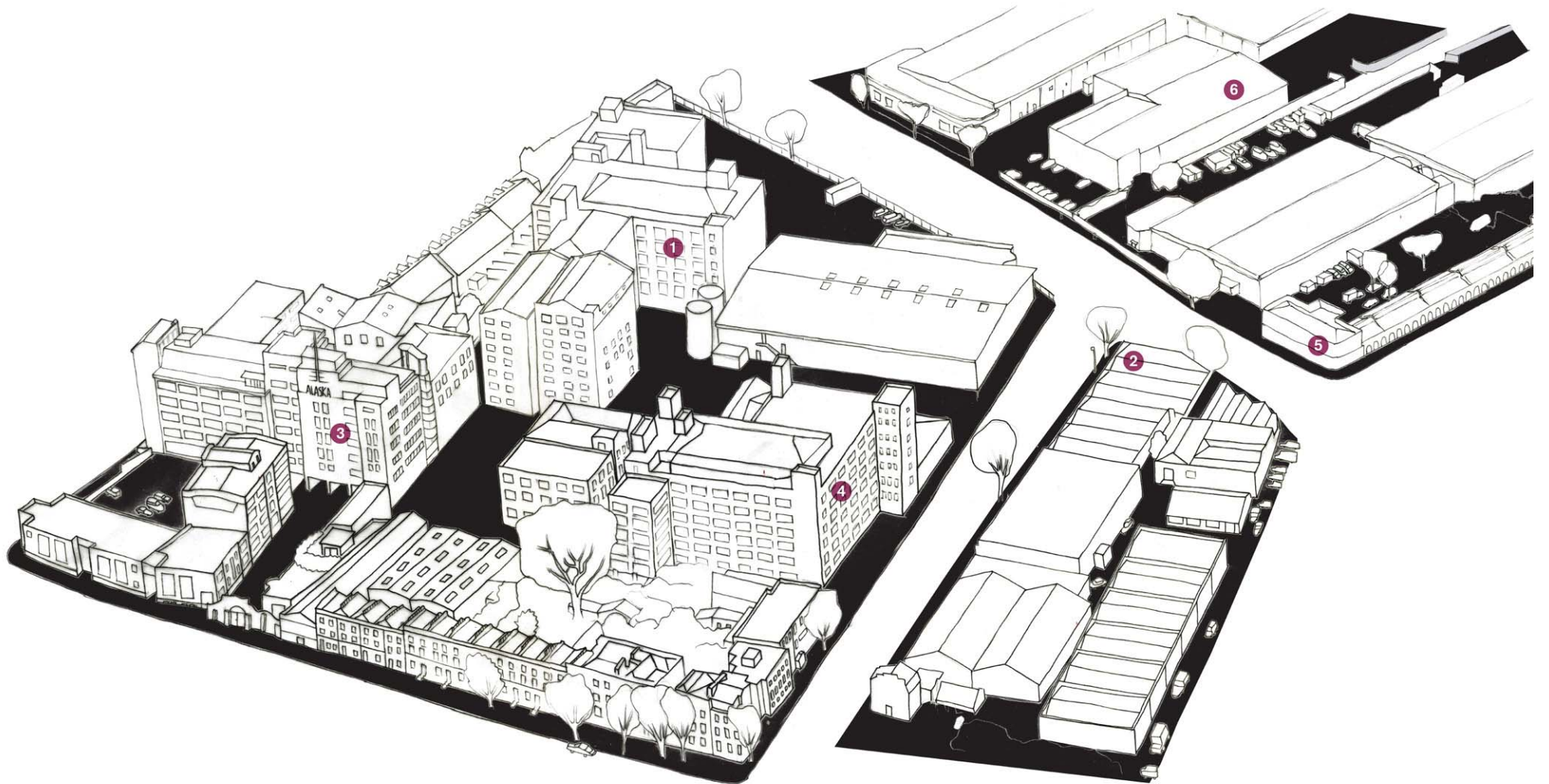
Crimscott Street divides the Rich Industrial Estate, running north to south through the centre of the site. The stock on the eastern side of the cluster largely comprises of two-storey 1960s buildings, while the buildings to the west are more varied. These include Rich House, a 7 storey pre-war building that fronts imposingly onto Crimscott Street, as well as an impressive series of former cannery buildings dating back to the late 1800s. Originally built for the Elizabeth Lazenby company, which made Worcestershire Sauce, the buildings were later occupied by Crosse & Blackwell, which produced Branston pickle, sauces and salad cream on site, before finally moving out in 1969. Also on site, although at the decidedly drearier end of the quality spectrum, is 61 Willow Walk, a storage facility constructed in the 1990s, similar in both style and function to the larger warehousing units of the Mandela Way Industrial area opposite. Of greater interest are “the Willows” business centre, a surviving building of Bricklayers depot, and the Victoria pub opposite. Built in the 1880s it has managed to retain much of its original interior, and is one of only 3 pubs within the wider OKR study area.

The 2 storey brick buildings on the southern side of Crimscott Street are home to a mix of food preparation businesses, various printers, a laundry and a range of small businesses. Across the road Rich House and other larger

46 businesses
528 employees
134 jobs per hectare
11% vacancy rate

buildings had housed a large number of artists, small creative businesses, as well as printers and other larger businesses. However, the site is now being considered for redevelopment for new and refurbished business space and housing, a process that has accelerated to the pre-application stage since our survey was undertaken. While a few businesses remain on site, the majority have not had their leases renewed and much of the site currently sits empty.

Sitting behind the Rich Industrial Estate is the impressive Alaska factory buildings. Built in 1869 by C.W. Martin & Sons to house their seal-fur tanning operations, the factory employed more than a thousand people including ‘clerks, shavers, blubberers, fleshers, dyers, tubbers and top-hatted wing-collared aproned craftsmen’. The factory became an important supplier for the R.A.F. during WWII, processing 345,000 sheepskins and 100,000 coat linings for manufacture into flying suits, as well as making bunk-rugs and clothing for Mrs Churchill’s Aid to Russia Fund. Following extensive rebuilding in the 1930s and post-war years - designed by Wallis, Gilbert & Partners - the only surviving remnant of the original factory building are a set of decorative brick gates on Grange Road, complete with a carved seal. Having closed in the 1980s, the factory has recently been converted into housing.



- 1 London Sculpture Workshop
- 2 Benwells
- 3 Alaska Factory
- 4 Soutwark Studios
- 5 The Willows Business Centre
- 6 Mandela Way Industrial Estate



Clockwise from top left
Former pickle factory buildings, until recently occupied by a large number of artists, creative practitioners and other small businesses. Original entrance to the Alaska Factory tannery complex on Grange Road.

View from courtyard of Rich Estate.

The Willows business centre, one of the only remaining sections of the original Bricklayers rail depot. The Victoria public house, complete with original Truman Brewery lettering.

View from the Rich Estate.



London Sculpture Workshop

The London Sculpture Workshop (LSW) can hardly be described as your typical artist studio. Established in 2012 as a not-for-profit, community interest based company, the workshop provides facilities for artists and those interested in working in 3D. Access is based on an open-access membership scheme. Shared facilities include metal and wood workshops, mould making and ceramic areas, as well as a mind boggling range of electric and hand tools. LSW has recently moved from the ground floor of a nearby building on the estate, following the recent termination of their lease. Melis, the workshop manager and our tour guide, and his colleagues need to find new premises, while still setting up their current workshop. Moving the business will not be easy, with some of the equipment weighing close to half a tonne and any downtime resulting in a drop in income from membership fees.

Shared sculpture workshop

Established 2012

4 employees

2 months at location

Southwark customer base

One of only 2 shared access sculpture workshops in London





Butlers Dry Cleaners have been operating from their current location for the past 13 years, serving a solid base of returning customers from the local area

Business aspirations

As a final part of the interview process, businesses were asked a number of more forward looking questions, including predictions on expected growth over the next year (in terms of overall employee numbers and space required) desired improvements to the area, and whether the business had any plans to move away within the next year.

In an encouraging sign for businesses growth, 43% of interviewed businesses are expecting a need to employ additional staff over the next year (35% slight increase, 8% substantial increase), suggesting an atmosphere of general optimism amongst businesses. Only 5% of those interviewed expected a decrease in the number of employees. Interviewed businesses were somewhat less optimistic in terms of expected need for additional space, with only 28% of businesses expecting an increase (16% slight increase, 11% substantial increase). The variance between expected employee growth and need for additional space is to be expected, given that it is substantially easier and cheaper to hire new staff, than it is to find and secure larger businesses premises. However, interviewees responses can also be seen as a

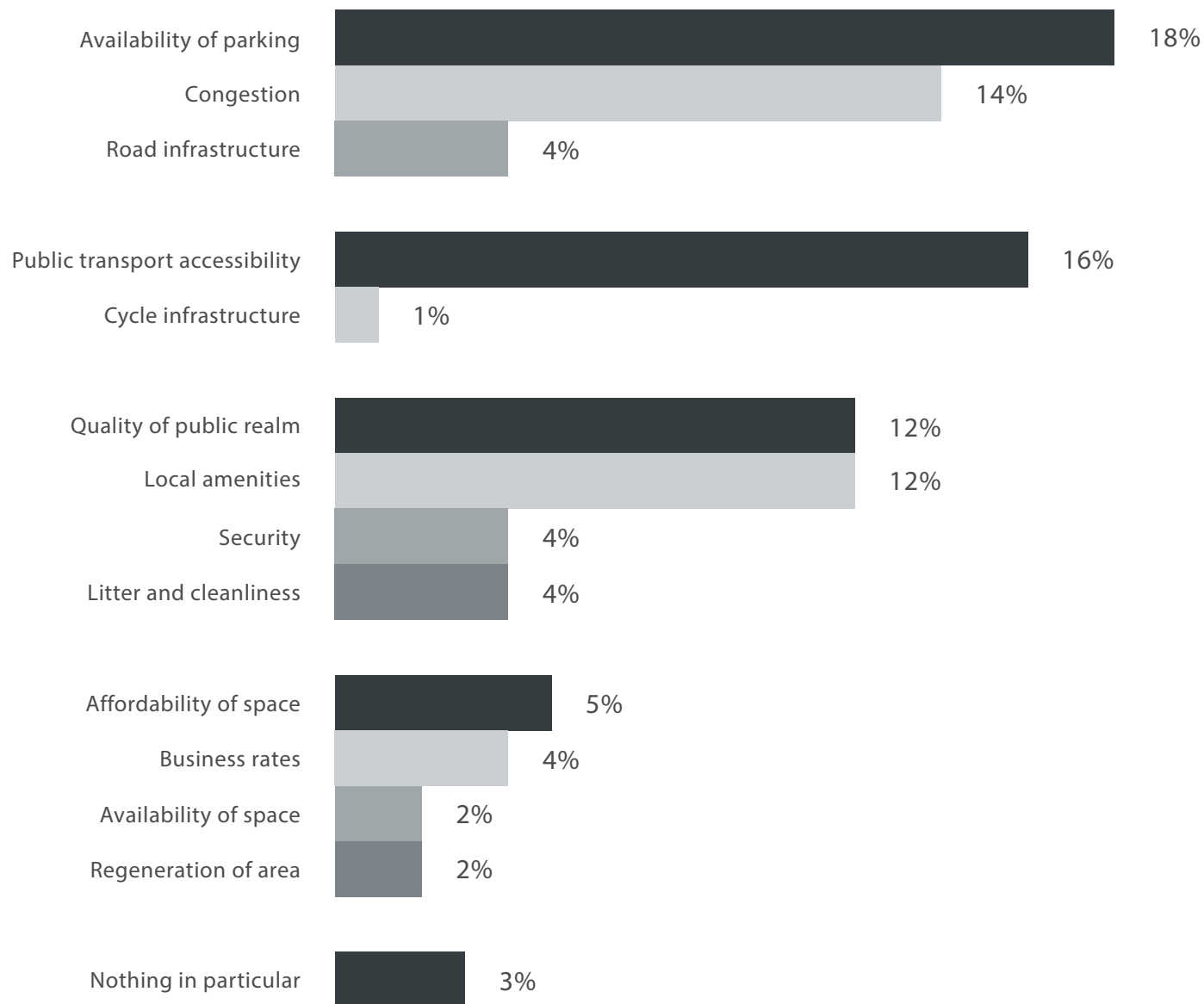
reflection of the limited amount of space available in the Old Kent Road, with low vacancy rates in both the high street and industrial areas making it increasingly difficult to find new premises. The majority of interviewed businesses reported that they planned to remain in the area

43% of interviewed businesses are expecting a need to employ additional staff over the coming year.

over the coming year (85%), with only 15% reporting any plans to move away. The majority of those planning to move away came from the Rich Estate, where a large number of leases have not been renewed in the run up to the site's potential redevelopment/refurbishment for a mix of uses.

Desired improvements

Businesses' desired improvements highlight a clear issue around vehicle accessibility with 'Availability of Parking' (18%) and 'Congestion' (14%) jumping out as two of the most prominent concerns. While these concerns do point towards areas for possible improvements, they are also a reflection of one of the area's key strengths, namely its good road access and proximity to central London. However, there is also a desire for better transport accessibility, with 16% of interviewed businesses calling for some form of improved public transport access, the majority of which are calling for the extension of the Bakerloo Line from Elephant and Castle. A large number of businesses are also concerned with the quality of environment, with improvements to the public realm (12%), the variety of local amenities (12%), security (4%) and litter and cleanliness (4%) forming an interrelated set of concerns.



Next steps

The survey work for the employment study is now complete, and has already been presented to the local community at a Community forum held on 21 May 2015, with discussions structured around the theme of 'Business'. The Old Kent Road Employment study brings together important and detailed baseline information which will directly inform and feed into a number of studies. Southwark Council will soon be commissioning an Employment Land Review (ELR) which assesses the relationship between supply of and demand for employment land and forecasts future needs for such land, as well as an employment land strategy for the Old Kent Road opportunity area. The ELR will provide recommendations on the opportunities to rationalise and intensify preferred industrial locations, and the potential for mixed use development that retains and intensifies existing uses that support the potential for future jobs growth.

In parallel to the Employment Land Review and Employment strategy for Old Kent Road, a Characterisation study is underway which will form part of the urban design evidence base and will carry out research and analysis on the physical

The study provides a detailed baseline information which will inform a number of studies that will help identify what improvements could be made to the area.

environment to better understand the local character and heritage of the Old Kent Road Area. Ultimately, these studies will feed into a development capacity master planning exercise, which the Council will use to help understand what improvements could be made to the area. A key part of this will be a strategic approach to the distribution of land uses and unlocking sites to support growth in terms of new homes and jobs. The

new plan will provide a new framework to help support new development and growth for the next 15 years. Throughout the process, plans will be consulted on using the momentum of the Old Kent Road Community Forum. Whilst the AAP/OAPF is a long term plan that will take some years to implement, Southwark Council have secured just over £500k from the Mayor of London's High Street Fund for shortterm interventions to help realise potential opportunities along Old Kent Road from Bricklayers Arms to East Street.



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