



SOCIO- ECONOMIC VALUE AT THE ELEPHANT AND CASTLE

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Sociology Cities Programme ■

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Socio-Economic Value at the Elephant & Castle Report, August 2018

A research collaboration between Latin Elephant, Loughborough University and the London School of Economics and Political Science.

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The data for this study draws on field work undertaken by Latin Elephant and LSE Researchers in 2018. It supplements more extensive survey work undertaken by Loughborough University and Latin Elephant in 2017. All figures included in this report were generated as part of this fieldwork in 2018.

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INTRODUCTION

'Socio-Economic Value at the Elephant and Castle' is a collaborative research project between Latin Elephant, Loughborough University and the Cities Programme at the London School of Economics and Political Science. The project supplements the existing research conducted by Latin Elephant on the spaces and practices of trade at the Elephant and Castle Shopping Centre (Figure 1), which highlights the role of ethnic minority and migrant transactions. This report expands on the spatial, social and economic value forged by micro-economic and independent retail activity at the Elephant and Castle Shopping Centre and argues for its recognition in the current redevelopment processes. A draft of this report was supplied as additional evidence supporting Latin Elephant's 'Objection to Planning Application, Elephant and Castle Town Centre and LCC Campus at the EC (ref: 16/AP/4458)' in July 2018. Following Southwark Council's Planning Committee approval of Delancey's plan to demolish the Elephant and Castle Shopping Centre as part of wider regeneration plans, the application will be analysed by the Mayor of London, Sadiq Khan, for final approval by the Greater London Authority (GLA). This report provides additional evidence to the existing advocacy of Latin Elephant that calls for the GLA to protect the 130 independent, largely BAME traders who are currently within the red line designation for development. The report highlights the need for a wider recognition of the importance of protecting affordable workspace in the context of current regeneration and displacement processes in London.

Method

The key research questions focus on:

1. Who is disproportionately affected by the redevelopment of the Elephant and Castle Shopping Centre? Specifically, how has the redevelopment process been experienced by traders within the Shopping Centre?
2. What are the socio-economic and cultural practices of exchange within and between the shops? This includes shifts in tenure variations, gender and employment relations and forms of economic resilience.

Our method aims to:

- Build on the existing survey of traders conducted by Latin Elephant through detailed interviews with selected traders';
- Undertake additional spatial mapping of the Elephant and Castle Shopping Centre, including an inventory of shop sizes and shop uses (Figure 2);
- Draw on Borough and London wide data on current work and employment patterns.

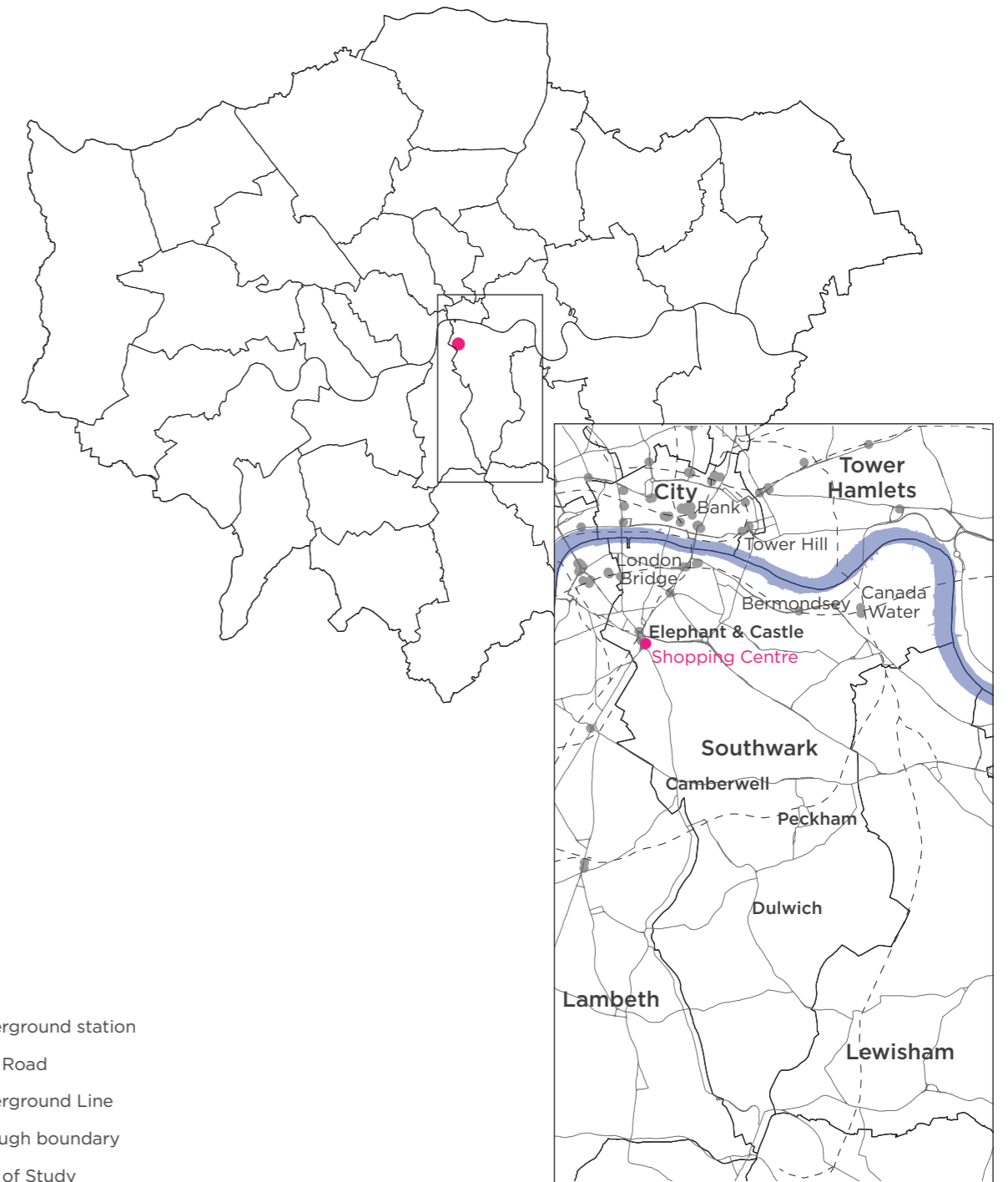


Fig 1. Location of Elephant and Castle within Southwark Borough; and Greater London.

Key focus

This research report engages with **what constitutes affordability** in the redevelopment of the Elephant and Castle Shopping Centre. It incorporates the current impacts of regeneration on traders, and brings issues of class and cultural diversity more centrally into the understanding of concentrated impacts of social change.

It outlines three key aspects core to the practice of trade in the Shopping Centre:

1. Diverse Infrastructure

The combination of people, spaces and activities that make up the life and livelihoods of the Shopping Centre.

2. Urban Networks

The connections between the Shopping Centre, the hub of public transportation, the density of tertiary education facilities, and the critical if diminished landscape of social housing.

3. The Cost of Regeneration

The consequences of protracted regeneration processes that cause significant stress for those who use and rely on the Shopping Centre as an affordable, cultural resource. This extends to how the functioning of business is undermined by uncertainty and the nature of compensation in the process of relocating the traders.



Fig 2. Use plan of the Shopping Centre in its local context.

WHY AFFORDABILITY IS ELEMENTAL TO UNDERSTANDING SOCIO-ECONOMIC VALUE

Principle:

Affordability is key to workspace and livelihoods and access to recreation and convenience activities. Proprietors and customers of the Shopping Centre constitute a diverse group of people in terms of age groups, ethnicities and income. In this context of mixed traders and mixed users the affordability of space, goods and services is the bedrock of the economic and social life of the Centre.²

- An assessment of what can be brought and experienced at the Shopping Centre reveals access to comparatively affordable goods and services.
- Affordability is key to who uses the Shopping Centre and the range of social value this entails. Places that provide affordable food, affordable Internet services, and a host of community services are core to social life.

In urban settings, affordability is always a related condition: residents of genuinely affordable homes, for example, require and support affordable recreation and retail in close proximity to their homes. It is therefore important to recognise affordable workspace in relation to affordable homes in Southwark:

- In 2001 total social housing amounted to 54.5% of housing stock in the Borough dropping to 41.9% in 2015 with marked reductions in socially rented units. From 2001 to 2011, the private rental sector had nearly doubled. The number of owned outright or with a mortgage was stable.³
- According to 2018 Land Registry Data the average property price in the borough of Southwark is £496,797 (Figure 3)⁴; according to the estate agent Foxtons in the area around the Shopping Centre it is £999,658, 56.8% above the London Average.⁵
- In 2015, the occupancy rates of social housing in Southwark were of 98- 100% except in Peckham and Walworth where 36% and 22% of the dwellings respectively are vacant. In the last ten years, the median housing prices have risen by 50% in the surrounding areas of the EC Shopping Centre.⁶ The physical change in the immediate surroundings of the Shopping Centre is visualised in Figure 4.

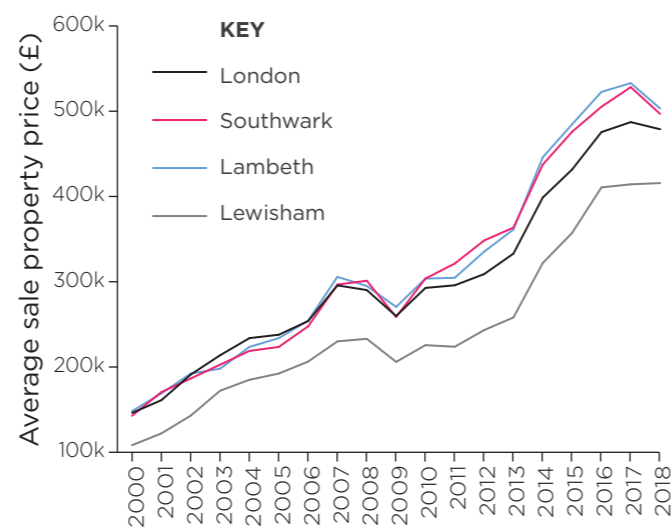
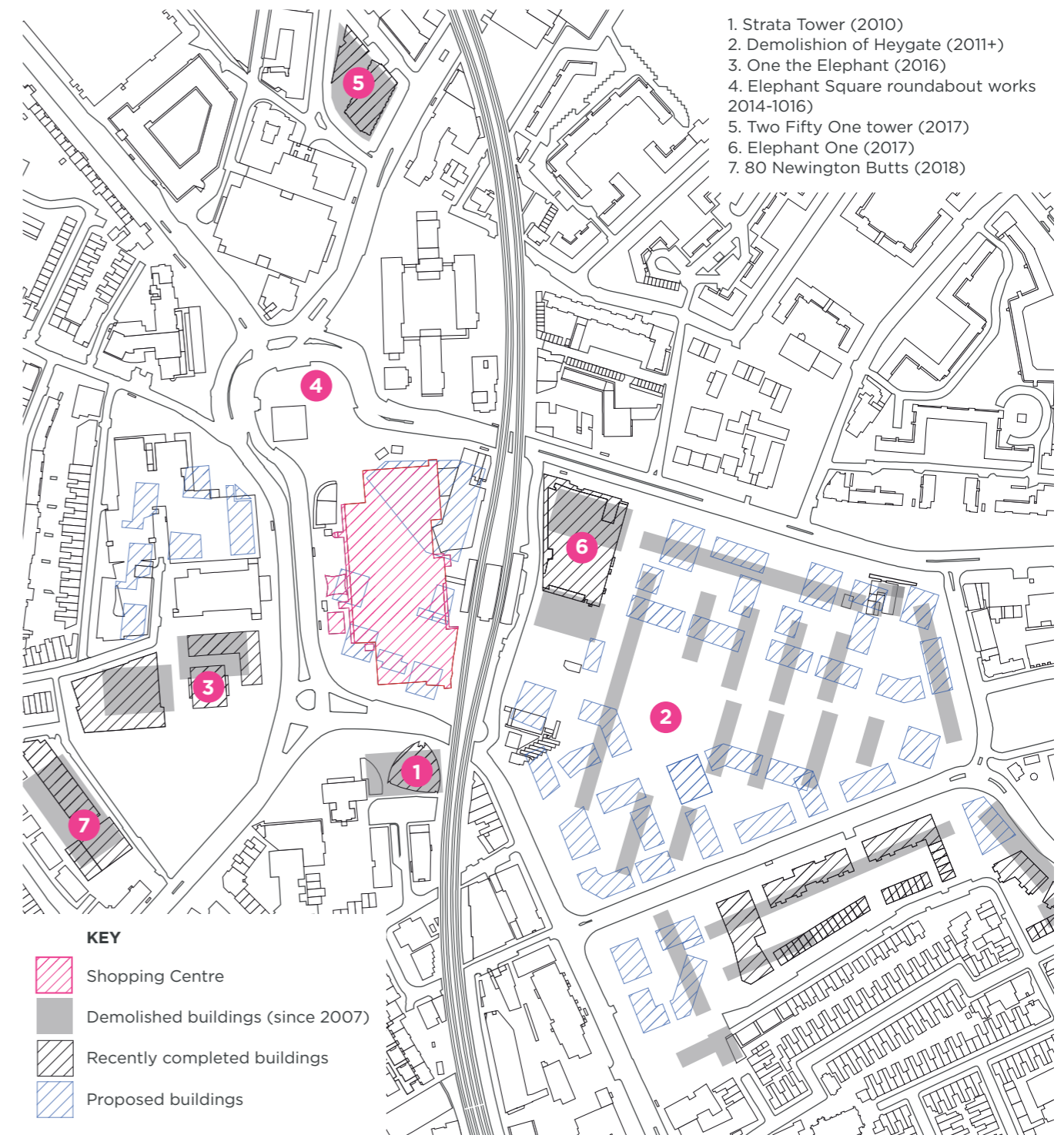


Fig 3. Average property price for Southwark, London and the neighbouring boroughs of Lewisham and Lambeth.



1. Strata Tower (2010)
2. Demolition of Heygate (2011+)
3. One the Elephant (2016)
4. Elephant Square roundabout works 2014-1016)
5. Two Fifty One tower (2017)
6. Elephant One (2017)
7. 80 Newington Butts (2018)

Fig 4. Changes to the built environment around the Shopping Centre and location of key transport infrastructure.

The need to prioritise and protect affordable dwellings is paramount, and it is crucial to simultaneously recognise that affordable workspaces are also under threat. Permitted development rights (PDR), which allows turning office space into

residential use continues to affect the amount of genuinely affordable workspace across London. Elephant and Castle is included in the Central Activities Zone (CAZ) and therefore excluded from PDR until 2019⁷. Affordable workspace in the New London Plan is defined as, “Affordable workspace is defined here as workspace that is provided at rents maintained below the market rate for that space for a specific social, cultural, or economic development purpose.” Policy E3 of the New London Plan (2017)⁸ states that:

- Particular consideration should be given to the need for affordable workspace: 1) Where there is existing affordable workspace on-site; 2) In areas where cost pressures could lead to the loss of affordable workspace for micro, small and medium-sized enterprises (such as in the City Fringe around the CAZ and in Creative Enterprise Zones); and 3) In locations where the provision of affordable workspace would be necessary or desirable to sustain a mix of business or cultural uses which contribute to the character of an area.
- Leases or transfers of space to workspace providers should be at rates that allow providers to manage effective workspace with sub-market rents.
- The affordable workspace elements of a mixed-use scheme should be operational prior to residential elements being occupied.

The disappearance of affordable workspace jeopardises the productive fabric of central London and precludes possibilities of a wider range of innovation and job creation. According to the New London Plan, the CAZ contains clusters of specialist activities that have developed organically over time. The Mayor has credited the importance of these forms of spatial clustering for creative industries in Soho, West End and the Barbican. The Elephant and Castle Shopping Centre is not identified as providing sector specialist activities but it has become a crucial economic and social anchor for comparatively low-entry retail and service activities. This has played an important role in including Latin American and other BAME communities in Southwark. It also highlights the need to recognise migrant and ethnic economies as a specialist economic sector to be supported and encouraged by London Plan policies.⁹

London has thrived on its openness to diverse talent, investment and trade. Of the 8.7 million people that live in the capital nearly 40% were born outside the UK. The Mayor’s office underscores that this diversity contributes to London’s cultural and economic strengths, and that migrant and minority communities make key contributions, where micro-economic activity is key. The Mayor has pledged to, ‘help start-ups and small businesses to grow by promoting access to affordable workspace, finance and business support’¹⁰ :

- 30% of SMEs established between 2009 and 2011 used an incubator or a co-working space.¹¹
- National government estimates that there are 1 million SMEs led by women, contributing a Gross Value Added (GVA) of £85 bn to the economy. The 300,000 BAME-led SMEs in the UK were estimated to contribute a GVA of £30 bn.¹²

- “The retail sector also employs more ethnic minorities than the average for all industries in London, with ethnic minorities making up around 35% of the retail workforce, compared to 20% in the rest of the economy. Additionally, ethnic minorities make up around 42% of the self-employed in retail; this is a very high level which contrasts with other sectors of the economy in which ethnic minorities are underrepresented, particularly in terms of self-employment”.¹³

The loss of affordable and independent retail space is situated in the wider national context of a significant shift in the growth of small-scale self-employment over the period from 2001 to 2017, in which independent retail is key.¹⁴ This reality jars with the loss of affordable workspace and migrant micro-economies in Southwark:

- Between 2013 to 2017, there was a 50% reduction in National Insurance Number applications among the nationalities that operate in the Elephant and Castle Shopping centre. The most affected national groups are Colombians (-66%) and Nigerians (-56%).¹⁵
- Between 2002 and 2012, retail workspace rateable value rose by 55%. Southwark was the borough where the prices of office space rose the most, 159%, almost three times inner London’s average of 51%. During the same period, the availability of retail space increased by 3% while the availability of office space increased by 20%.¹⁶
- The demand for retail floor space that the GLA has projected for the next 25 years is stagnant in the borough of Southwark with a reduction of in between -4,585m² and 23,316m². In Walworth Road, this reduction will mean an estimated loss of £5.650.000 in the estimated turnover.¹⁷

Within the GLA’s own framework the potential for the displacement of affordable workspaces that offer diverse forms of socio-economic exchange is of concern. The Elephant and Castle is a designated Opportunity Area (OA) as per the London Plan of March 2015. The theme 1 of the Supplementary Planning Document published by Southwark Council and the Mayor of London states that the redevelopment should ensure: “Renew business space in the area and encourage the development of an enterprise culture and inward investment by providing more opportunities for local people and small and medium-sized businesses (SMEs)”.¹⁸

Key considerations:

- **The systematic demise of affordability across London is a form of discrimination. Planning should actively regulate against the loss of genuinely affordable spaces to live and work, with regulation to protect affordable housing provision as well as affordable workspace.**
- **The unaffordable 80% market rental units should be replaced with the London Living Rent.**
- **A just relocation and compensation deal should be in place to protect the small independent traders within the boundary of the Elephant and Castle Shopping Centre planning application, and respect existing lease arrangements.**
- **The redevelopment plans should recognise the importance of the diversity of small and medium scale trading activities.**

1. DIVERSE INFRASTRUCTURE

1.1 Principle

The Shopping Centre hosts a rich combination of people, spaces and activities that make up the life and livelihoods of those who live and work there.

1.2 Findings

Social value: In interviews with proprietors at the Elephant and Castle Shopping Centre we note that all proprietors interviewed conducted some form of social value within the remit of their work. This factor connects with the highly invested role of independent proprietors:

- “There is a retired builder that passes here every day. The other day he didn’t and I phoned him. We went to his house, and he needed help. He spent one week in intensive care.”
- “I used to have a hairdressing school during the night. 10 or 15 years ago, there were only private schools. We opened the saloon to teach. It was free, no charge for that. I helped people learn hairdressing including deaf people.”
- “We are not just a food place. We are an information point. People come here and ask for a doctor or a bank. Some people even ask about other restaurants! It is kind of sad because if we moved to other places people may see it more difficult to come in.”

Scale of units: Spatial mapping reveals that retail practices operate from units ranging from 1.3m² to 88m² (Figure 5). This variety constitutes different forms of affordability from shared tenancies that allow for part time work, low-entry and hence affordable space, a stepping stone of different scales of space that allow for incremental growth:

- “I started by business by making coffee at home and selling it here. I then started selling food and bought this shop and then I expanded, and I recently just opened up another [London based] business.”

In addition to the variety of units there is also a variety in terms of uses from cafes to gaming shops; which despite decreases in footfall still cater for large numbers of customers from varied ethnicities.

Synergies between units: The high social and cultural capital found in Elephant and Castle Shopping Centre is generated by the intense clustering of units in one place. During interviews proprietors described the importance of the existing clustering such as smaller units next to, or adjacent to larger units such as the Santander Bank and Tesco. They also felt that this will be lost under the new plans with businesses relocated to various unconnected sites; some of which are in discreet locations with low footfall. 67% of interviewees reported losses to their business due to the closures of ‘anchor’ business:

- “I lost clients when the Santander closed. People came to the bank and then got a haircut. If the Tesco goes, I don’t know.”
- “We are quite well-known for helping people. We have people coming from the airport with their luggage! ... Once the shopping centre is gone, the commercial hub will be scattered.”

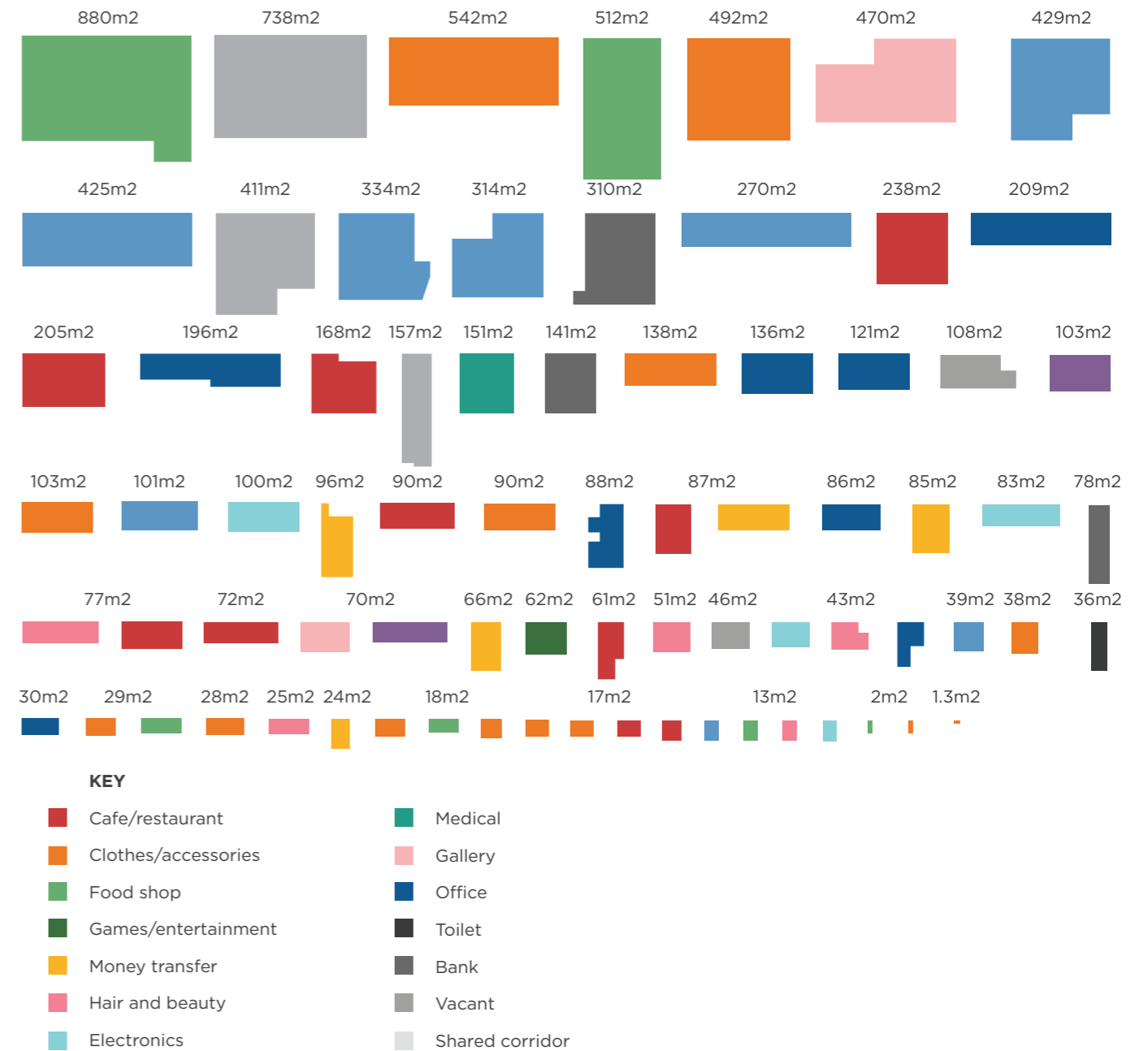


Fig 5. Range of units sizes and use. Note this drawing excludes the Bingo Hall & Bowling Alley and external market stalls.

1.3 Key Considerations

- Only 411 square metres have been made available for independent traders by Delancey. Traders currently occupy 4,005 square metres of floor space. This equates to the displacement of the majority of those businesses.
- The relocation plans should consider the value of how businesses and services work as clusters not simply as single entities.
- The relocation plan should consider the spatial and tenure diversity within the Shopping Centre.
- The relocation plans should ensure the economic viability of existing businesses including leases and diverse tenure arrangements.

2. URBAN NETWORKS

2.1 Principle

The economic vitality of the micro-economies at the Shopping Centre is integral to the hub of public transportation and the density of tertiary education in the immediate area (Figure 5).

2.2 Findings

Small Enterprises: The majority of interviewees described themselves as independent entrepreneurs and in the majority of the cases are the sole source of income for those who work there.

- **“We are one family with two businesses here. We have no other income but our shops. Since I’ve been in England, I have only been self-employed.”**

These businesses rely on the economic vitality of the area, specifically the location of the Shopping Centre as a transport hub for the area (Figure 6). Elephant and Castle has both an underground and over ground station and has 38 bus routes that stop in and around the roundabout. The Shopping Centre falls within a region with the highest PTAL rating (6b), a widely recognised way to measure connectivity to the public transport network. The 130 small independent traders who currently occupy 4005m² inside and around the shopping centre are being offered 411m² for immediate relocation with another 1050m² of affordable floor space by 2019. An additional 300m² are offered by Delancey but only if planning consent is approved. By 2019 the available affordable retail space will equate to 1461m², leaving a shortfall of 2,544m². These physical moves away from this connected hub will have a significant impact on the sustainability of these small and medium sized businesses.

Financial Loss: Many interviewees described how events such as the loss of social housing at the Heygate Estate, the closure of underpasses, lack of maintenance and other changes to the built environment have had, and continue to have, a dramatic impact on their businesses.

- In 2015, following a period of large-scale social housing demolitions the occupancy rates of social housing in Walworth were dramatically impacted: 1200 units at the Heygate alone were lost, and 22% of the dwellings were vacant in the ward.¹⁹

The impact of this has been felt in terms of custom (footfall) by the majority of proprietors interviewed:

- **“We are one family with two businesses here. We have no other income but our shops. Since I’ve been in England, I have only been self-employed.”**
- **“Now I get 20-25 people a day if I am lucky. I used to get 40-45 and on a good day 100. Now some days I get 5. Normally, in the weekend I was fully booked.”**

All proprietors interviewed, bar one, have had to let people go in recent years and since the announcement of plans for the proposed redevelopment of the shopping centre:

- **“I employ 4 women here. When these people arrived in England, I employed them. One is from Argentina, other Uruguay and two Colombians. We used to be 6. Now only 4.”**

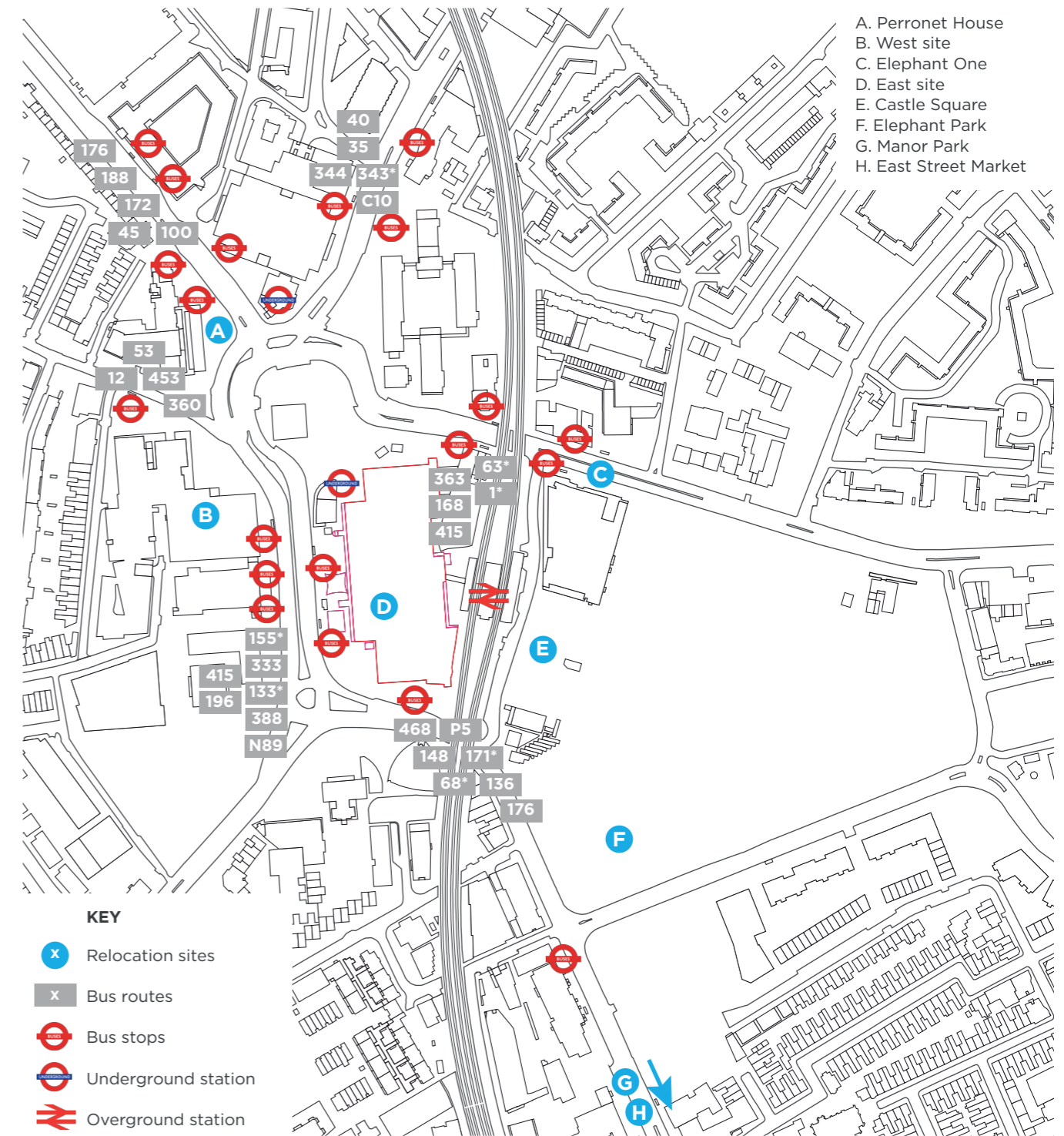


Fig 6. Changes to the built environment around the Shopping Centre and location of key transport infrastructure. *Indicates an additional night route.

2.3 Key Considerations

- **Establish a formal forum for property owners, managing agents and tenants from different surrounding institutions to exchange points of view, expertise and best practices to ensure a better understanding of the nature and range of small business practices.**

3. THE COST OF REGENERATION

3.1 Principle

Protracted regeneration processes cause significant stress and uncertainty, undermining the functioning of socio-economic exchange. Communication strategies are crucial, as are fair processes of compensation.

3.2 Findings

Uncertainty related to regeneration processes both internal and external to the Shopping Centre has a condensed set of impacts:

Financial Cost: Many businesses highlighted that since the Shopping Centre was earmarked for redevelopment there has been a gradual running down of the centre due to a lack of maintenance. Surveys revealed that although the environment of the Shopping Centre had been run down through limited maintenance, rental rates and services charges remained the same and in some cases increased:

- "I used to make £2000/week and now I am lucky to make £1000 but my rates and rent remain the same."
- "They broke the glass of my shop while cleaning. They have only put tape on it. No one has come to repair it. People now think their [possessions] are not safe here."

This should be understood as part of a wider conversation: The Mayor of London has denounced rises on business rates for SMEs as unfair when this is not in relation to their economic activities: "unfair on businesses for whom the increase in rateable value bears no reflection of the performance of their business".²⁰

Financial Stagnation: Many interviewees noted that the lack of information on the future of the shopping centre was a factor precluding adaptation and innovation:

- "I want to make my place beautiful. I want to buy new [furniture] but I don't know. If I move it would be very expensive to take them with me."

Sweat Equity and Long Term Investments: Surveys conducted by Latin Elephant reveal the Shopping Centre as a cluster of entrepreneurship that provides high-quality employment and socio-economic opportunities. Figure 7, based on data available from 36 respondents, charts when shops were established, ordered by age of the proprietor and a rough estimate of customers per day. 50% of these businesses have been established for over 10 years (since 2008) and of those 38% of the proprietors are in an age category of 50+ (which across all respondents is 41%). Corroborated by interviews conducted by the LSE this suggests that the economic landscape of the Shopping Centre is that which employs high numbers of people; however many shops have been affected, losing almost all employees. More work is required to understand the employment groups, and it is worth noting that a high portion of tenants of the Shopping Centre are women, as well as traders who have had long-term tenancies. This reflects the high level of investments traders have made over extended time periods, with, the average duration of tenancies is at 10 years.

- "Employment rates: In Southwark, the employment rate among people aged 16-84 decreased by 1.9% according to the 2017 annual population survey. Among ethnic minorities, this descent has been mitigated and it is 0.3%."²¹

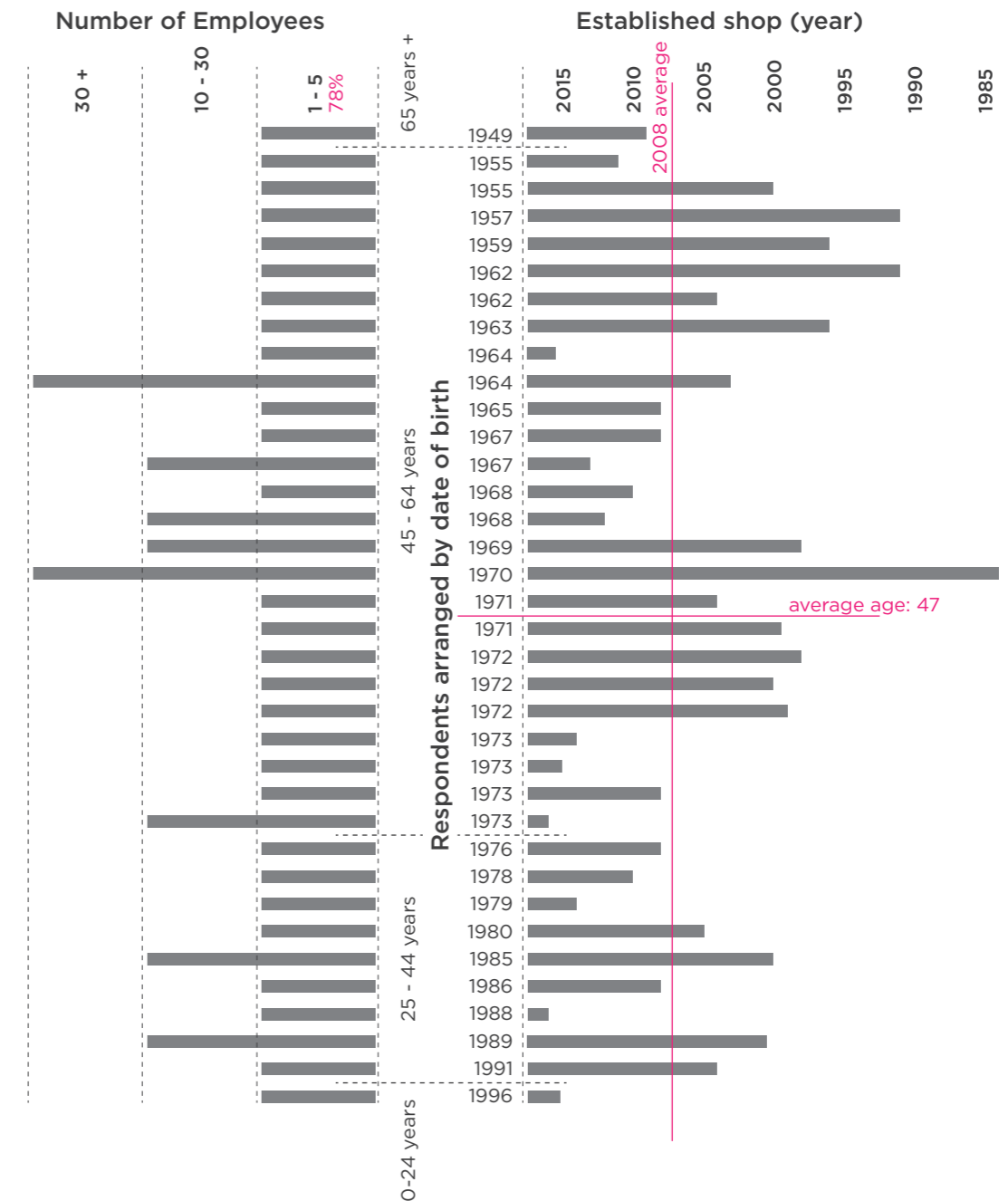


Fig 7. Duration of shops, and rough number of employees ordered by age of proprietor.

3.3 Key considerations

- A consistent, clear and regular communication strategy should be in place over periods of transition.
- An enhanced relocation fund together with the details of the relocation strategy should be advanced.
- The relocation fund should cover not only the physical relocation costs but expand to the loss of custom, and should be cognisant of long-term tenants.
- The management company should ensure adequate maintenance of the premises and individual units, or offer compensation by way of reduced rentals.

CONCLUSIONS

This report has emphasised that **affordability** must be understood in the round – considering where we live, recreate and work. Affordable workspaces are characterised by low entry rentals, require a range of tenure types and floor plate sizes to grow and change, and are often highly networked in social and economic ways. The Elephant and Castle Shopping Centre plays an important role in the creative fabric of London. These businesses not only contribute through their high social and cultural capital they also offer accessible economic opportunities for employment, particularly for the elderly and women.

The **diverse infrastructure** of the Shopping Centre allows for businesses to grow incrementally and adapt to change. This diversity is supported by significant social value: every trader interviewed went beyond their ‘formal’ role by offering various forms of support and care to local residents.

The **urban network** within which the Shopping Centre sits speaks to the importance of locality and place. Our surveys revealed a direct relationship between transport and housing and economic vitality. The relocation plans should consider the interconnectivity of the urban fabric, and the economic viability that the Shopping Centre as a physical hub represents.

The **cost of regeneration** should take time into account. Despite notable decreases in services and maintenance provided by the Shopping Centre management rates and service charges have remained the same and in some cases increased. Coupled with uncertainty and lack of information businesses have born a financial burden over years. Uncertainly precludes businesses investment and innovation, and relocation plans will disproportionately effect the traders at the Shopping Centre many of whom are of BAME background, the sole earners for their families, women and elderly. They have made elemental contributions to the economic and social value of the Shopping Centre, yet their future remains precarious.

ENDNOTES

1 All participants in the surveys conducted by LSE will remain anonymous, as such any references to their shops and names have been removed.

2 We draw on our research conducted in the ‘High Streets for All’ report commissioned by the Mayor of London in 2017 to echo that: the shopping centre provides local and affordable economic opportunities; and the shopping centre promotes affordable social and cultural exchange significant for the elderly, young people and newcomers.

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