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LLDC Combined Economy Study
Part B: Creative and Cultural Opportunities
Assessment

A Draft Report by Regeneris Consulting, We Made
That and Tom Fleming Creative Consultancy
March 2018

London Legacy Development Corporation

Combined Economy Study Part B: Creative and Cultural Opportunities Assessment

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1. Introduction

- 1.1 Regeneris Consulting along with We Made That, Tom Fleming and Carter Jonas have been commissioned by London Legacy Development Corporation (LLDC) to carry out a Combined Economy Study to inform the 2018 review of the area's Local Plan.
- 1.2 The commission includes:
- A Local Economy Study
 - A Local Business Survey
 - A Retail Needs Assessment
 - Creative and Cultural Opportunities Assessment
- 1.3 This report is the Creative and Cultural Opportunities Assessment. It comprises the study of creative industries and cultural economy in the LLDC area. This includes statistics on the scale of the creative and cultural sectors in the area, evidence from primary business, resident research, and consultation with local stakeholders and operators. The report concludes with recommendations and policy interventions.

Creative and Cultural Opportunities Assessment: Continuing Momentum and Differentiation

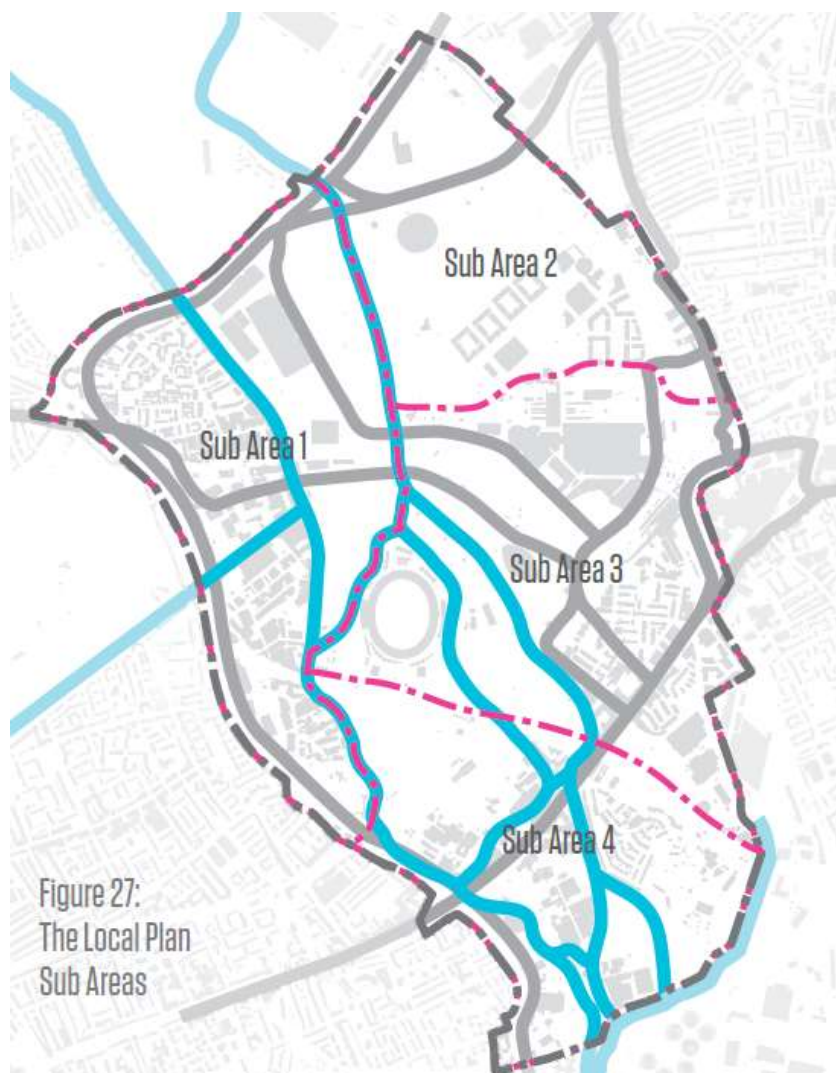
- 1.4 Over the last decade, the LLDC area and surrounding locations (particularly Hackney Wick and Fish Island) have developed a reputation for creativity and culture. This concentration of activity has evolved and changed in nature over time, creating unique places which today host some of the most exciting activity and events in London. In March 2018, Hackney Wick and Fish Island was named as one of the first ten Creative Enterprise Zones in London.
- 1.5 As will be highlighted later in the report, the LLDC area already has a diverse range of exciting creative activity which is interlinked with cultural assets and the night-time economy. These contribute not only to their own sector and the economy as a whole, but also to a sense of place and identity, driving the appeal of the area for investors and occupiers.
- 1.6 The development of the Cultural Education District, International Quarter Stratford and evolution of Hackney Wick Central, will all play a fundamental role in the evolution of the creative and cultural offer in the LLDC area. These and a set of challenges associated with rapid change in the area, provide a moment in time where the decision and actions of local

partners will fundamentally influence how the LLDC area achieves its full potential as a creative and cultural area.

The LLDC Area

- 1.7 The London Legacy Development Corporation (LLDC) is the Local Planning Authority for the area of east London which encompasses the Queen Elizabeth Olympic Park and surrounding area. It is one of only two development corporations in London, and crosscuts the four east London Boroughs of Hackney, Newham, Tower Hamlets and Waltham Forest.
- 1.8 Established by the Mayor of London in 2012, the Corporation has the responsibility for delivering the regeneration of the Olympic Park and surrounding area through high-quality sustainable development and investment.
- 1.9 Hosting the London 2012 Olympic Games brought significant national and international attention to this part of London, and has resulted in rapid changes over the past five years. There are now over 26,000 people in the LLDC area, which results from a population increase of over ten times the rate of London between 2010-2015.
- 1.10 The area is also characterised by a growing young population and a rise in the number of creative and digital industries (particularly supported by new initiatives and development such as HereEast, the International Quarter and a new Cultural Education District (CED).
- 1.11 Figure 1.1 provides a context map of the Local Plan area and the sub-areas identified in this.

Figure 1.1 LLDC Local Plan Sub-Areas



Source: LLDC Local Plan, 2015

1.12 The four sub-areas which make up the LLDC area are:

- **Sub-Area 1:** Hackney Wick and Fish Island
- **Sub-Area 2:** North Stratford and Eton Manor
- **Sub-Area 3:** Central Stratford and Southern Queen Elizabeth Olympic Park
- **Sub-Area 4:** Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Meads.

1.13 These are used as the basis for sub-area analysis within this report.

Structure of the Report

1.14 The remainder of this report is set out in the following way:

- Section 2 - What the Statistics Tell Us: context relating to the creative and culture sectors in the LLDC area, based on national and regional statistics.
- Section 3 - Granular review: a detailed view of what is happening on the ground based on the most recent business survey and household survey commissioned as part of the LLDC Local Plan review.
- Section 4 - Creative, Cultural and Leisure Activity - Sub-Area Analysis: detailed insight into the existing activity that is happening in each of the identified subareas.
- Section 5 - Creative and Cultural Activity in Future Development: the major pipeline developments and the implications for the creative and cultural offer within the LLDC area.
- Section 6 - Strengths and Challenges: based on the desk-based research, consultations and primary research the strengths and challenges of the LLDC area.
- Section 7 - Opportunities & Threats: based on the desk-based research, consultations, primary research and planned developments; the potential opportunities and challenges for the LLDC area.
- Section 8 - Recommendations & Policy Implications: conclusions and recommendations for LLDC.

2. What the Statistics Tell us

- 2.1 The starting point for any sector study is to look at the available business and employment data. This section looks at a range of national and regional information to help build a picture of the existing creative and cultural activity that is taking place within the LLDC area.
- 2.2 Whilst this is the most up to date data available, due to the rapidly changing nature of the LLDC area, the information is quickly out dated. To support these statistics, primary research based on the recent LLDC Business and Household surveys was also assessed.
- 2.3 It should be noted that although this report focusses in part on the night time economy in the LLDC area. Given the breadth of activity covered in this, a single 'sector' definition is not possible and as such, this is not included in the analysis below.

Defining Creative and Cultural Activities

- 2.4 Defining what is 'creative' and what is 'cultural' can be difficult given the ever-changing nature of each sector. Explained below are the definitions used for this study.

DCMS Definition of Creative and Cultural Industries

- 2.5 The creative sector encompasses a diverse range of businesses, with activities across a wide range of industries. The 'creative' sector is an unconventional sector which can be difficult to define statistically due to a lack of reliable and universally understood data. The Department for Culture, Media and Sport (DCMS) first published its definition of the sector in 1998, with 13 subsectors such as performing arts, film, advertising and software.
- 2.6 Nesta's critique of the DCMS definition highlights that a definition solely focusing on industry types (as captured by SIC codes) is too exclusive and restrictive and cannot encapsulate the creative industries comprehensively. They have subsequently done further definition and mapping work to expand the DCMS definition. The work suggested that the focus must be put on occupations to reflect the full range and depth of the creative economy.
- 2.7 This requires consideration not only of those industries traditionally understood as creative, but also the 'creative intensity' of other industries. This captures creative occupations like designers, illustrators and developers that are employed in 'non-creative' industries but still employed for their creative talent nonetheless.

LLDC Creative Definition (DCMS+)

- 2.8 Pilot statistical analysis using the traditional DCMS definition alongside field research indicated a strong degree of creative activity in the LLDC was unaccounted for. To better reflect the size and type of creative activities taking place across the LLDC area, we have added the fashion manufacturing sub-sector to our definition, in which there is a high proportion of creative activity in the LLDC.
- 2.9 Added to the DCMS definition detailed above, this produces a new definition of the creative sector, which we have called DCMS+.

LLDC Cultural Definition

- 2.10 Similarly, to the creative definition set out above, the cultural definition has been adapted from DCMS guidance. Here the DCMS suggests that whilst there here is no consistent, internationally agreed definition of Culture, their proposed definition best captures its reference in UK policy (using 4 digit SIC Codes)CMS has defined the Cultural Sector as industries with a cultural object at the centre of the industry.
- 2.11 More detail of this definition and the SIC codes it encompasses is provided in the Appendix of this report.

Figure 2.1 Summary Infographic



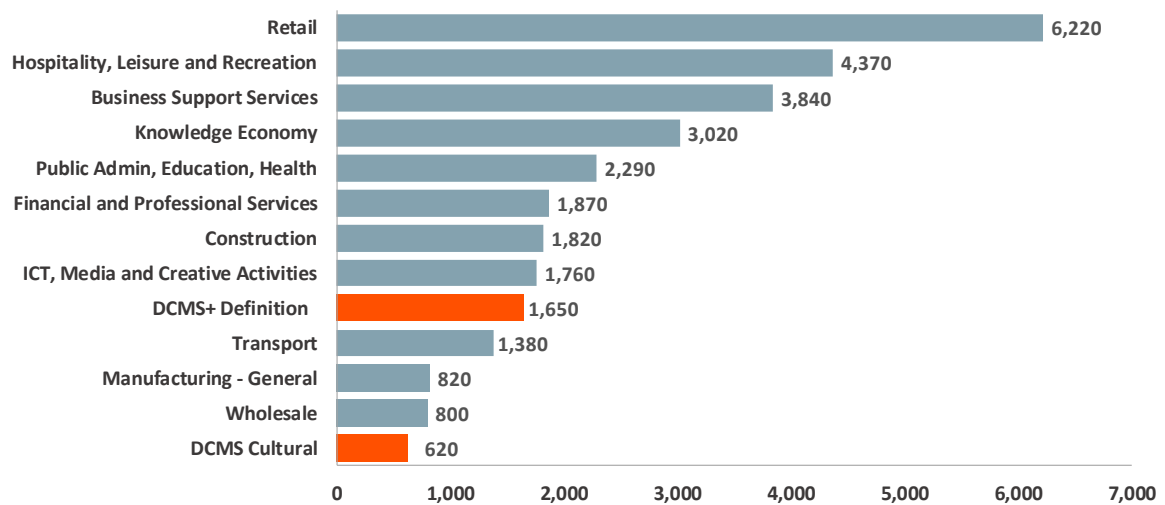
Source: Regeneris (2018)

Statistical Portrait of Creative and Cultural Activity

Both Cultural and Creative are prominent sectors

2.12 Both the Creative and Cultural sectors are relatively significant providers of jobs in the LLDC area, employing 1,600 and 600 people respectively. There are 600 Creative businesses & 200 Cultural businesses. Around 6% of the LLDCs total employment is in the Creative sector.

Figure 2.2 LLDC Employment by Sectors 2016



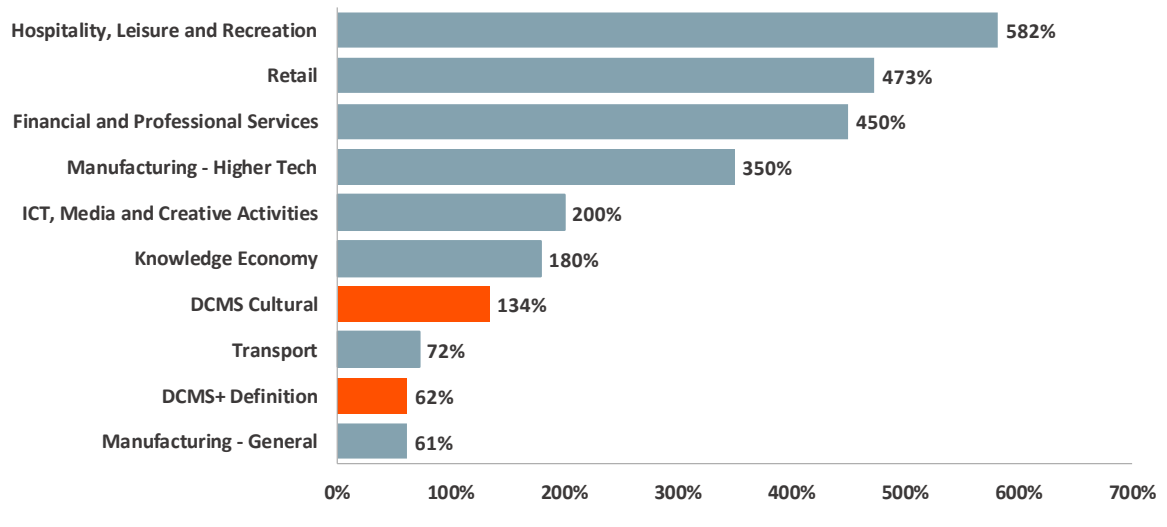
Source: Business Register and Employment Survey (BRES), 2016

NB: This portrays the largest 13 sectors in the LLDC area. Due to the nature of the sector definitions by SIC code, there is overlap between some sectors.

Both sectors have experienced growth in the last five years

2.13 Over the past five years, the Cultural and Creative sectors have grown, both are amongst the fastest growing in the LLDC area.

Figure 2.3 Employment Change Across LLDC Sectors 2011-2016



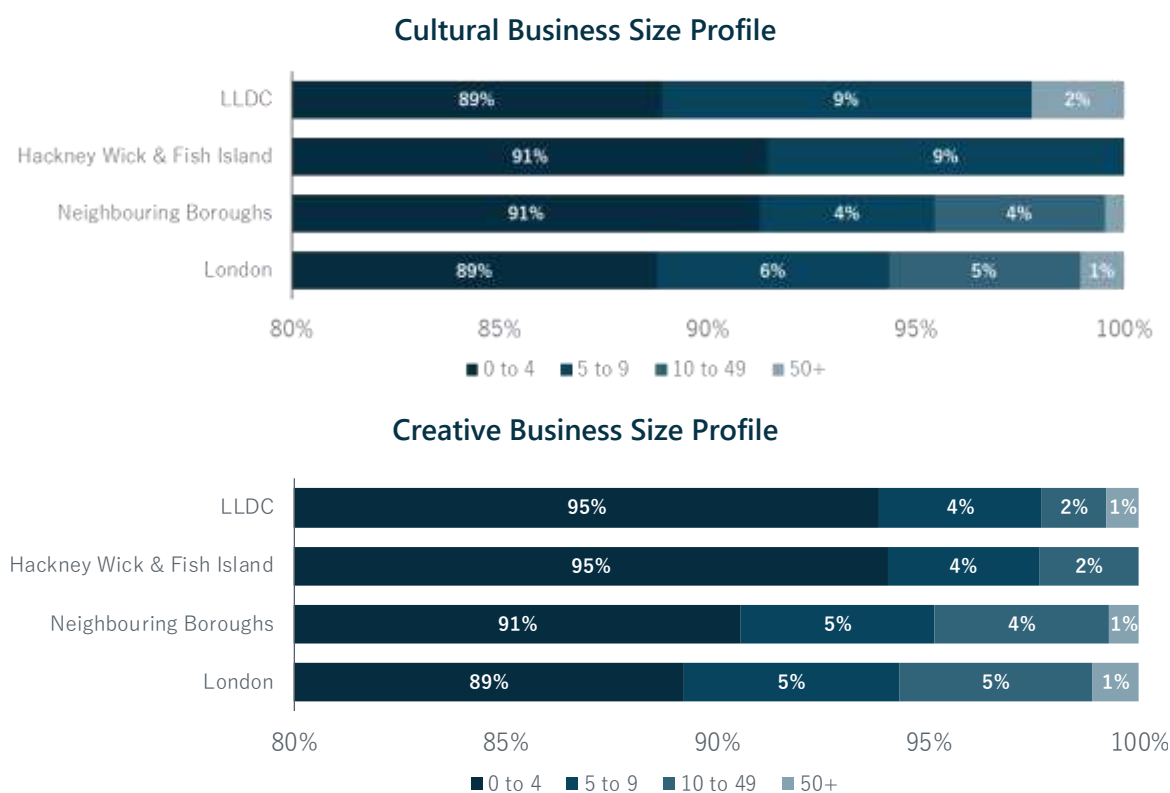
Source: BRES, 2011 and 2016. NB: This portrays change for the largest 13 sectors in the LLDC area.

NB: This portrays the largest 13 sectors in the LLDC area. Due to the nature of the sector definitions by SIC code, there is overlap between some sectors.

LLDC Cultural & Creative businesses are relatively small

- 2.14 The LLDC Creative and Cultural sectors are characterised by a high proportion of small businesses when compared to London. Despite this large proportion of small businesses, the Cultural sector has a higher proportion of businesses employing over 50 people than in London as a whole.

Figure 2.4 Business Size Profiles



Source: UK Business Count 2017 NB: These figures are indicative of the size of each band and may not add up to 100% due to rounding of UK Business Count Data.

Growth across almost all business size bands

- 2.15 Over the past five years, the Creative sector in the LLDC area has seen growth across all size bands, with a large increase in micro businesses. The Cultural sector, has experienced a similar trend, albeit with a slight contraction in the amount of businesses employing 10 to 49 people.
- 2.16 Notably, both sectors have experienced an increase in businesses employing 50+ people. This growth in larger companies suggests that both sectors are more mature overall than was the case in the 2014 Economy Study.

Table 2.1 LLDC Business Profile Change 2012-2017

LLDC	0 to 4	5 to 9	10 to 49	50+
DCMS Cultural	+110	+20	-5	+5
DCMS+ Creative	+335	+15	+5	+5

Source: UK Business Count 2017.

A diverse range of Creative sub sector strengths...

- 2.17 The LLDC creative sector is diverse and includes a range of sub-sector specialisms. Relative to London, the LLDC area has a particular specialism in fashion manufacturing (with 9.6 times more employment proportionally compared to London).
- 2.18 Fashion Manufacturing employs around 200 people in the LLDC area and has experienced around +60% growth between 2011 and 2016. Film, TV, video, radio & photography is the largest creative sub-sector within the LLDC area, employing around 500 people.
- 2.19 The Business Survey suggests that this type of activity is primarily taking place in workshop spaces. Small-scale fashion manufacturing in the area (designers, bespoke, artisan manufacturing) needs space to run equipment like sewing machines, looms, dyeing stations, cutting tables and screen printing equipment. Section 4 provides an overview of the spatial profile for workshop/studio type space.
- 2.20 Other prominent sub-sectors include IT, software & computer services (300 jobs), architecture (220 jobs) and design (100 jobs).

Table 2.2 LLDC Creative Sub-Sector Specialisations (Location Quotients), 2016

Sub-Sector	LLDC		Neighbouring Boroughs		London
	Spec.	% change 2011-16	Spec.	% change 2011-16	% change 2011-16
Advertising & Marketing	0.6	32%	0.8	55%	41%
Architecture	2.0	100%	1.1	53%	34%
Crafts	1.3	100%*	0.8	19%	-1%
Design	1.4	86%	1.6	49%	40%
Fashion	9.6	57%	2.3	37%	29%
Film, TV, video, radio & photography	1.7	52%	0.9	55%	13%
IT, software & computer services	0.6	58%	1.2	42%	29%
Museums, galleries & libraries	0.2	100%*	0.9	11%	21%
Music, performing & visual arts	0.6	71%	0.7	6%	16%
Publishing	0.4	43%	0.7	-37%	-1%
Creative TOTAL	1.0	61%	1.0	38%	24%

Source: BRES, 2016

Note: **Spec. (Specialisation)**: Using LLDC's Creative Profile Definition; Numbers show the specialisation (location quotient) of the sub-sector in an area relative to London. A score above 1 shows that there is a

higher specialisation of activity in the sub-sector in an area compared to across London – these are highlighted in blue.

% change 2011-16 (% change in employment between 2011 and 2016): * = small sample size (less than 20 employees); Cells highlighted blue have employment growth of greater than 50% over the last five years.

Strong performance across cultural sub-sectors

- 2.21 The LLDC Cultural sector is largely focused on arts and music and film, TV, video, radio and photography. These two sub-sectors make up over 90% of cultural sector employment in the LLDC area, with each sub-sector employing around 100 and 500 people respectively.
- 2.22 The LLDC area does not however, have an employment specialism in these sub-sectors as they make up roughly the same proportion of total cultural employment as London as a whole.
- 2.23 The latest data from BRES suggests that there are only 10 people employed in museums, galleries and libraries in the LLDC area, this will clearly increase rapidly as the Cultural Education District (CED) is developed and major attractions come to the area.

Table 2.3 LLDC Cultural Sub-Sector Specialisations (Location Quotients), 2016

Sub-Sector	LLDC		Neighbouring Boroughs		London
	Spec.	% change 2011-16	Spec.	% change 2011-16	% change 2011-16
Arts and Music	0.6	322%	0.9	16%	116%
Crafts	1.1	-	1.0	24%	99%
Film, TV, Video, Radio and Photography	-	-	1.1	-58%	124%
Heritage	1.4	109%	1.1	121%	115%
Museums, Galleries and Libraries	0.1	-	0.5	231%	189%
Cultural TOTAL	1.0	134%	1.0	56%	117%

Source: BRES, 2016

Note: **Spec. (Specialisation)**: Using LLDC's Cultural Profile Definition; Numbers show the specialisation (location quotient) of the sub-sector in an area relative to London. A score above 1 shows that there is a higher specialisation of activity in the sub-sector in an area compared to across London – these are highlighted in blue.

% change 2011-16 (% change in employment between 2011 and 2016): * = small sample size (less than 20 employees); Cells highlighted blue have employment growth of greater than 50% over the last five years.

The Cultural Profile Definition also includes the following sub-sectors: Heritage; Museums, Galleries and Libraries; Crafts; and Cultural Education. There was no employment in LLDC in these sub-sectors.

Creative and Cultural activity is focussed at Hackney Wick and Fish Island

2.24 A review of specialisms in the LLDCs sub-areas suggests that each of the area’s constituent parts have differing degrees of creative and cultural specialism:

- **Hackney Wick and Fish Island:** Creative sector specialisms in Fashion Manufacturing, Design and Crafts.
- **North Stratford and Eton Manor and Central Stratford:** Creative specialisms in architecture and IT software and Cultural specialisms in Film and TV.
- **Pudding Mill and Bromley by Bow:** Concentrations of Creative sector employment in Fashion Manufacturing and Film, TV and Radio. The area holds Cultural sector specialisms in Heritage, Museums, Galleries and Libraries.

Figure 2.5 Employment Specialisms by Sub-Area

Employment Specialisms	Hackney Wick & Fish Island	North Stratford and Eton Manor + Central Stratford	Pudding Mill and Bromley by Bow	
	Sub Area 1	Sub Area 2 & 3	Sub Area 4	
DCMS Creative+				
Advertising & Marketing				
Architecture				
Crafts				
Design				
Fashion Manufacturing				
Film, TV, video, radio & photography				
IT, software & computer services				
Museums, galleries & libraries				
Music, performing & visual arts				
Publishing				
DCMS Cultural				
Arts and Music				
Crafts				
Cultural Education				
Film, TV, Video, Radio and Photography				
Heritage				
Museums, Galleries and Libraries				

Sector Specialism	2.0+	1.3-1.9	1.0-1.2	<1.0

Source: BRES, 2016

Sector Specialism – Measured against the employment profile across London where a score higher than 1.0 denotes a higher than average concentration.

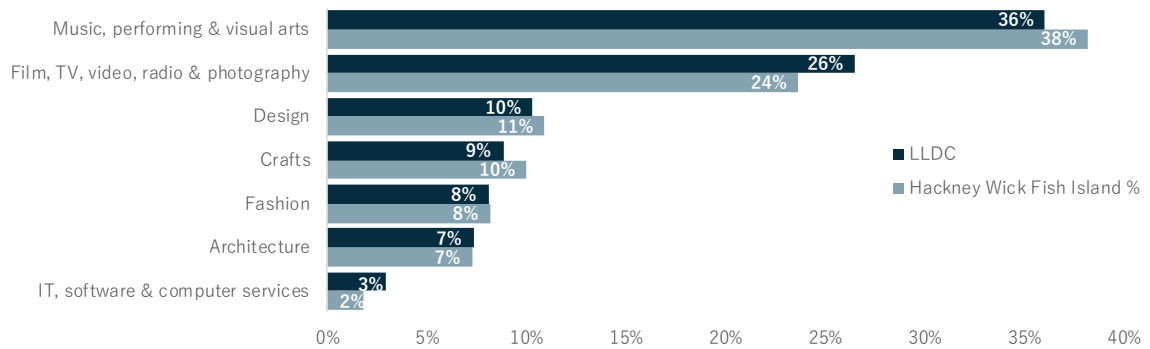
3. Granular Review of LLDC Creative, Culture, Leisure and Night Time Economy

- 3.1 To supplement government data which can be too static to respond to such dynamic sectors, it is important where possible to carry our primary research to 'get ahead' of the data; to do this, a detailed survey of local businesses has been undertaken.
- 3.2 The LLDC Business Survey (analysed more fully in Part A) questioned 602 businesses within the LLDC area; 136 of these could be defined as operating within the creative/cultural sectors. The survey captured a series of business data ranging from the type of business activity, number of employees to year of establishment. Analysis here identifies where changes have taken place since the 2014 business survey.
- 3.3 Alongside this, a series of consultations were conducted with local businesses and stakeholders to gather a more detailed understanding of the sector and its current position.
- 3.4 Of the 136 businesses identified as creative or cultural within the business survey, 81% (110) were located within the Hackney Wick and Fish Island area. As such, analysis takes a closer look at this area, alongside the LLDC area as a whole. Consideration is also given to what has changed since the previous business survey in 2014.

Creative Activity by Type

- 3.5 No one sub sector is disproportionately represented, there are however, particular concentrations of businesses in the music, performing and visual arts sector (36%) and in film, TV radio & photography (26%). Sound and video production services appear to have grown in prominence in the area since 2014, surpassing the number of design and architecture service businesses which were previously more prominent.

Figure 3.1 Creative Businesses by Type

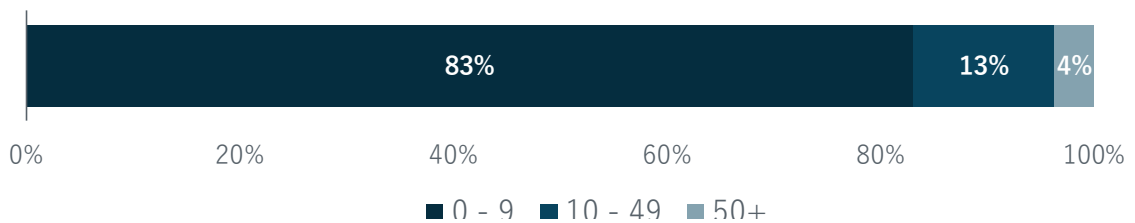


Source: WMT LLDC Business Survey. Sample 136.

Business Size

3.6 As reflected in the government datasets, the LLDC creative business base is characterised by smaller companies. However, a review of primary data shows that the creative business base in the LLDC does have a larger proportion of 50+ creative businesses in operation (4%) than in 2014. This suggests the area has either supported the growth of existing businesses or inward investment from elsewhere.

Figure 3.2 LLDC Creative Businesses by Size



Source: WMT LLDC Business Survey 2017. Sample 136.

Creative Workspace

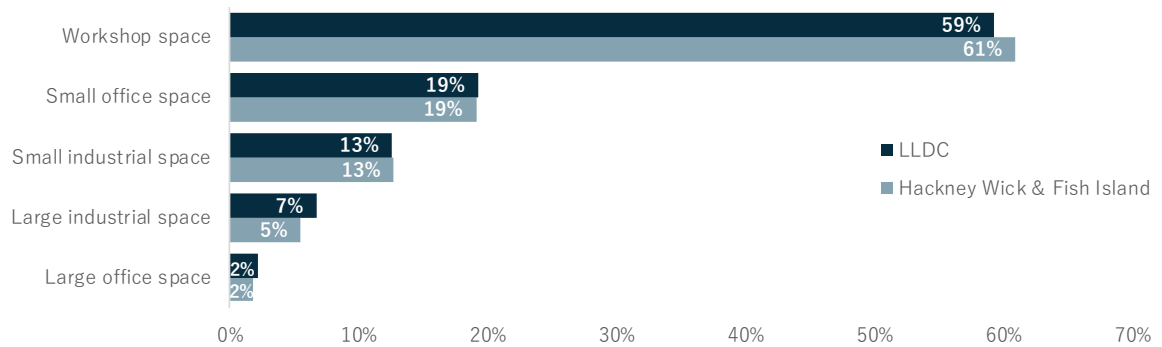
3.7 The predominant workspace type for creative businesses is 'workshop' space, which makes up over half of the total creative workspace within the LLDC area (59%) and an even higher proportion within Hackney Wick & Fish Island (61%).

3.8 Observations by business survey researchers suggests that the majority of creative workspace provision is converted from previous uses. For example, the Peanut Factory buildings around Dace Road and the industrial units on Dye House Lane are now occupied by various businesses in workshop space converted for this particular use. Pipeline

workshop space such as HereEast’s forthcoming (2018) gantry development, is an example of dedicated workshop space being provided.

3.9 Large office space makes up the smallest proportion of creative workspace within the LLDC (2%), reflecting the relatively small proportion of businesses employing over 50+ people and the sector specialism in the area.

Figure 3.3 Creative Workspace by Type

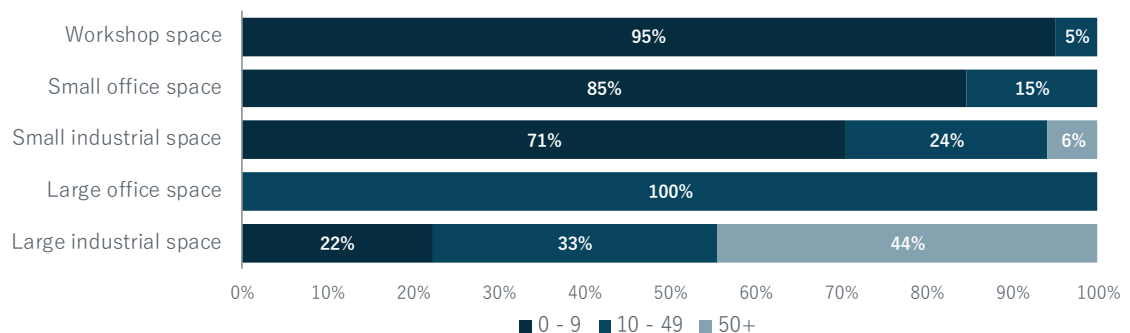


Source: WMT LLDC Business Survey 2017. Sample 136.

Business Size by Workspace

3.10 A more detailed review of the of creative workspace shows that different types of space accommodate different sizes of business. Large Office space in the LLDC area accommodates entirely creative businesses with 10-49 employees. Conversely Large Industrial Space has a more diverse mix of creative business sizes, providing workspace for 0-9 (22%), 10-49 (33%) and over 50 (44%).

Figure 3.4 LLDC Creative Businesses Size Profile and Workspace

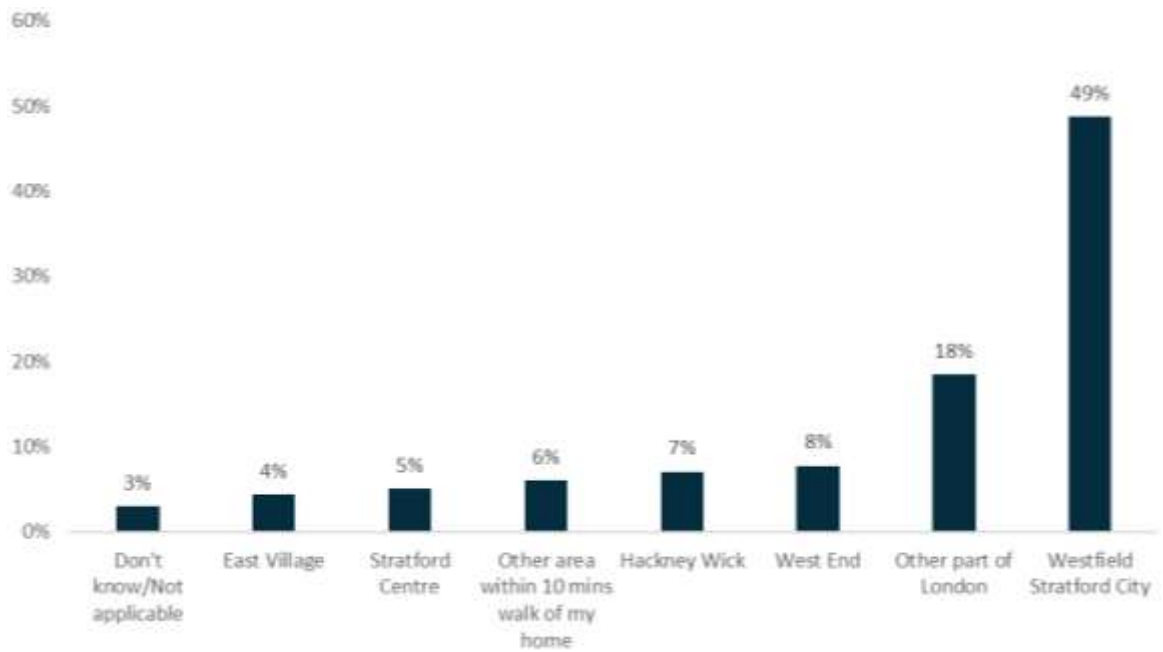


Source: WMT LLDC Business Survey 2017. Sample 136.

Culture, Leisure and the Night-Time Economy

- 3.11 The LLDC area is a well-established and diverse evening and night time leisure location. The area has large-scale events venues such as; the London Stadium, VeloPark and Copper Box Arena within the Queen Elizabeth Olympic Park. A strong commercial leisure and culture offer within the Westfield Centre (including; cinema, chain bars and restaurants) and a more nuanced range of local and independent establishments in Hackney Wick, HereEast and Stratford Town Centre.
- 3.12 The LLDC area is major attractor of leisure visitors from across London and beyond which also has a strong local customer base. The recent household survey¹ commissioned by LLDC demonstrated the area had high retention of local residents, with over 70% of LLDC residents stating they stayed within the area for leisure activities.

Figure 3.5 Main Leisure Destinations for LLDC Residents

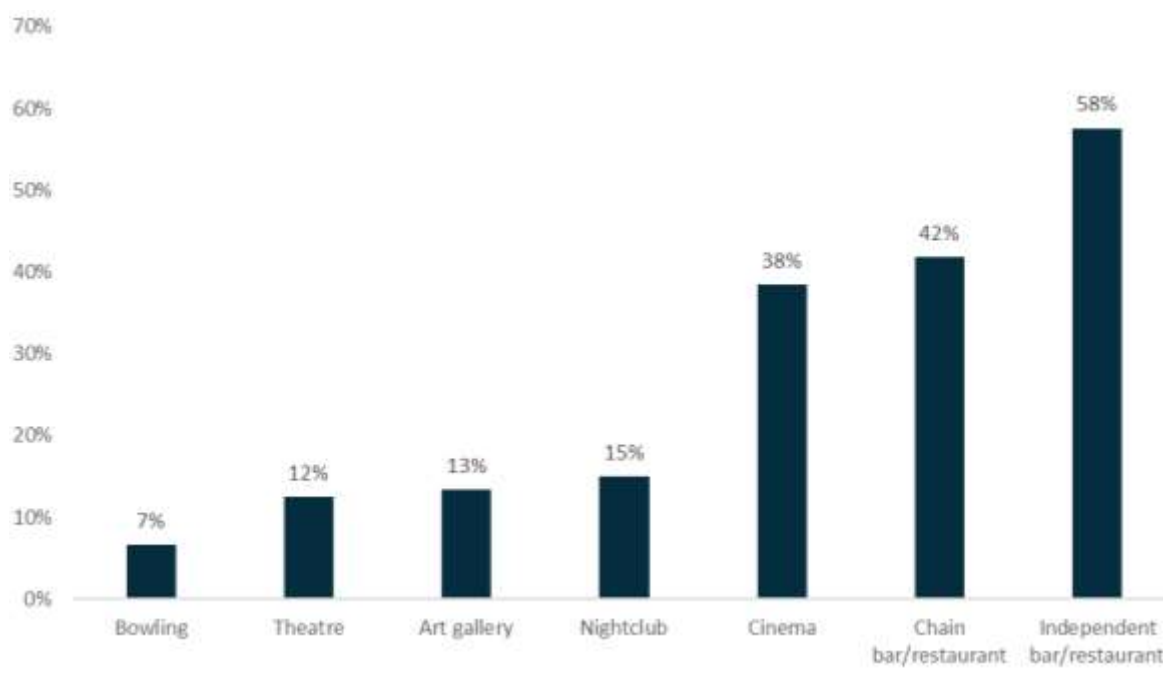


Source: ORS Household Survey, 2017

- 3.13 Due to the breadth and scale of leisure activities on offer within the Westfield centre, it is no surprise that this is the main choice of leisure destination for LLDC residents. Hackney Wick and Fish Island also attracts residents from outside its immediate local area. Whilst Stratford Town Centre is outside of the LLDC area, it should also be acknowledged as contributing to the wider offer and cultural diversity of the LLDC area.

¹ Opinion Research Services, LLDC Household Survey 2017

Figure 3.6 Main leisure activities LLDC residents



Source: ORS Household Survey, 2017

- 3.14 The household survey suggests that LLDC residents are participating in a range of leisure activities; visiting bars and restaurants being the most popular. 1 in 10 households visit the theatre or art galleries. Whilst there is a strong preference for eating out or visiting the cinema, the survey has shown that residents have an appetite for a range of cultural and leisure activities.

Current Spatial Profile

- 3.15 As part of the Business Survey which forms part of the Combined Economy Study and acknowledging the LLDC Employment Space Study (2015), a range of space requirements, based on specific types of business activity in the LLDC area have been assessed.

Table 3.1 Spatial Profile for Leisure and Night-time Activity

	Assembly	Large industrial	Large office	Retail space	Small industrial	Small office	Workshop	Grand Total
NTE	10%	14%	3%	46%	15%	7%	5%	100%
R (Food)	4%	2%	0%	77%	9%	2%	6%	100%
S (Drink)	0%	0%	0%	70%	30%	0%	0%	100%
T (Leisure)	32%	11%	5%	16%	11%	16%	11%	100%
Creative	10%	14%	3%	46%	15%	7%	5%	100%

- 3.16 Anecdotally, businesses surveyed suggest that they are attracted to the specific area and location, and make best use of the available space, rather than prioritising 'ideal' spatial provision when choosing to move in to the area.
- 3.17 The following more specific observations have been made relating to type of space currently occupied for leisure, night-time and creative activity within the LLDC area.

Culture and Leisure Activity

- There are no typical spatial characteristics for leisure and cultural activities, these tend to be bespoke to the specific activity in question. Visibility and ground floor access is crucial; proximity to other cultural and leisure uses are also preferable.
- Most leisure activities are operating from assembly spaces. These spaces are typically purpose-built to accommodate leisure activities and generic workspace guidance is limited in this regard.
- There are, however, some examples of industrial and workshop spaces being used for leisure activities, including The Hackney Wick Boulder Project, Exp Leisure and CrossFit 1971. These present examples of how other types of workspace can be adapted for leisure uses. High ceilings and larger unit footprints (with longer building spans) are some of spatial features which have allowed these spaces to be re-purposed for leisure activities.
- Specific cultural spaces (Theatre Royal, cinemas and The Yard Theatre are accommodated in purpose-built. Other cultural facilities (such as the Children's Story Centre and The Bridge) are located in repurposed high street facilities, whilst spaces such as Stour Space provide a more flexible cultural offer as partner of a crossover in an ever-changing environment.
- There are also culture and leisure-related businesses who have their office / operational functions in the area (e.g. Flip Out trampolines, VINCI Hackney Playbus), operating from office-type spaces. Some of these businesses have a requirement for storage space (either yard or warehouse-based) to support their business activities, but these are in the minority.

Night-time Activity

- The typical space for 'night time industrial activity is an industrial unit of 500m² or less with a 4-8m high ceiling and loading bay. Leisure and retail activities operating

at night are also likely to be less than 500m² with ground floor access to shared space to capture footfall.

- A broad range of night-time activities are present in small and large industrial spaces. This includes manufacturing of food, tailoring, printing and waste management services. Creative uses such as recording, production and photography studios also operate at night. Charities and community uses with evening activities are also present in these spaces. The food, drink and leisure activities that make up a large portion of night-time activity are also present across industrial spaces, including restaurants, bars, nightclubs and a theatre.
- Almost half of night-time activities are currently taking place in retail-type spaces (street-facing, ground floor) linked to food and drink offers. This suggests that spaces with good street-level visibility along areas of pedestrian footfall are attractive to these occupiers.
- A subset of night-time activity is also taking place in large industrial units. This activity is typically linked to food and drink production, construction, wholesale and public services (e.g. Royal Mail).
- Improved street lighting, signage, way-finding measures and night-time transport options such as the Here East bus system, stand to improve the appeal of the area for night-time uses and to improve the conditions for businesses and staff currently operating beyond typical working hours.
- Across Hackney Wick and Fish Island are numerous examples of how industrial units have been re-purposed for creative and cultural uses which include night-time activities. Mick's Garage in Queens Yard, Stour Space, Grow Bar & Restaurant, Vibes Photography Studio and the Yard Theatre are good examples of how small industrial spaces have been re-purposed to accommodate night-time activities. Crucially, most of these businesses currently neighbour other employment uses. A key challenge for an evolving Hackney Wick and Fish Island is ensuring that these uses can be retained in the area as the population grows. Adhering to the Agent of Change Principle (set out overleaf and in the Mayor of London's Culture and Night Time Economy SPG (2012) will be crucial to managing this change and continuing to accommodate the diverse and changing offer that has come to define the area.
- Across all of these activities (food, drink, leisure and night-time), a close consideration of noise mitigation measures should be conducted in line with guidance provided in the LLDC Employment Space Study appendix (2015). This is

especially important when co-location of residential and employment uses is being proposed on a given site (see below for further information).

The Agent of Change Principle and Noise Mitigation

The Agent of Change principle places the responsibility for mitigating impacts from existing noise-generating activities or uses on the proposed new noise-sensitive development. Planning authorities should ensure that planning decisions reflect the Agent of Change principle and take account of existing noise-generating uses in a sensitive manner when new development, particularly residential, is proposed nearby. Therefore, development should be designed to ensure that established night-time active businesses remain viable and can continue or grow without unreasonable restrictions being placed on them.

Planners, developers and other development partners should make use of the extensive noise mitigation measures outlined in the appendix of the 2015 LLDC Employment Space Study. This includes detail on noise mitigation measures to apply to glazing, doors, ventilation, building orientation, walls & floors and external facades. The appendix also outlines typical permitted day and night-time noise levels for industrial, commercial, residential and 'silence zones'. These standards should be applied as a minimum to developments in locations identified as night-time activity spots. The appendix also provides specific detail on how to treat noise from industry and noise from construction activities – both of which are prevalent in certain locations across the LLDC area.

Creative Activity

- 60% of creative businesses surveyed are working from workshop / studio type spaces (higher ceilings up to 3.5m, provision possible on any floor, typically multiple units provided in one building through subdivisions).
- Typically creative activity also occurs in small industrial space (<500m², higher ceiling, 4.5 - 8m). This is to facilitate businesses with larger or growing workforces, support creative production, for example printing or fashion, or to give space to certain activities, such as photography studios.
- There is some need to transport / move goods, materials and products associated with these uses, although this is typically less frequent than for industrial activities. This includes moving around artworks, equipment and materials used for creative production.

- Goods lifts, shared yard spaces and loading bays support most workshop spaces, and a consideration of the servicing needs of creative occupiers should be carried out as part of any planned re-provision or delivery of new workshop-type spaces.
- Early engagement with creative workspace providers (including those currently operating from the LLDC area) can help to inform the spatial requirements and fit-out needs of new creative workspaces.
- Some creative workspace providers report that while employment space is being re-provided through new schemes, landlords are often choosing to take on the management of these new workspaces and as a result the networks, local knowledge and support built up by existing workspace providers is lost. A lack of continuity of creative community, despite floorspace re-provision being successfully delivered, may threaten the success of space in the delivery pipeline.

3.18 Whilst the requirements detailed above are based on the existing types of space currently in use within the LLDC, any future requirements should be considered in consultation with the local community, occupiers and developers; to ensure the most appropriate space is delivered.

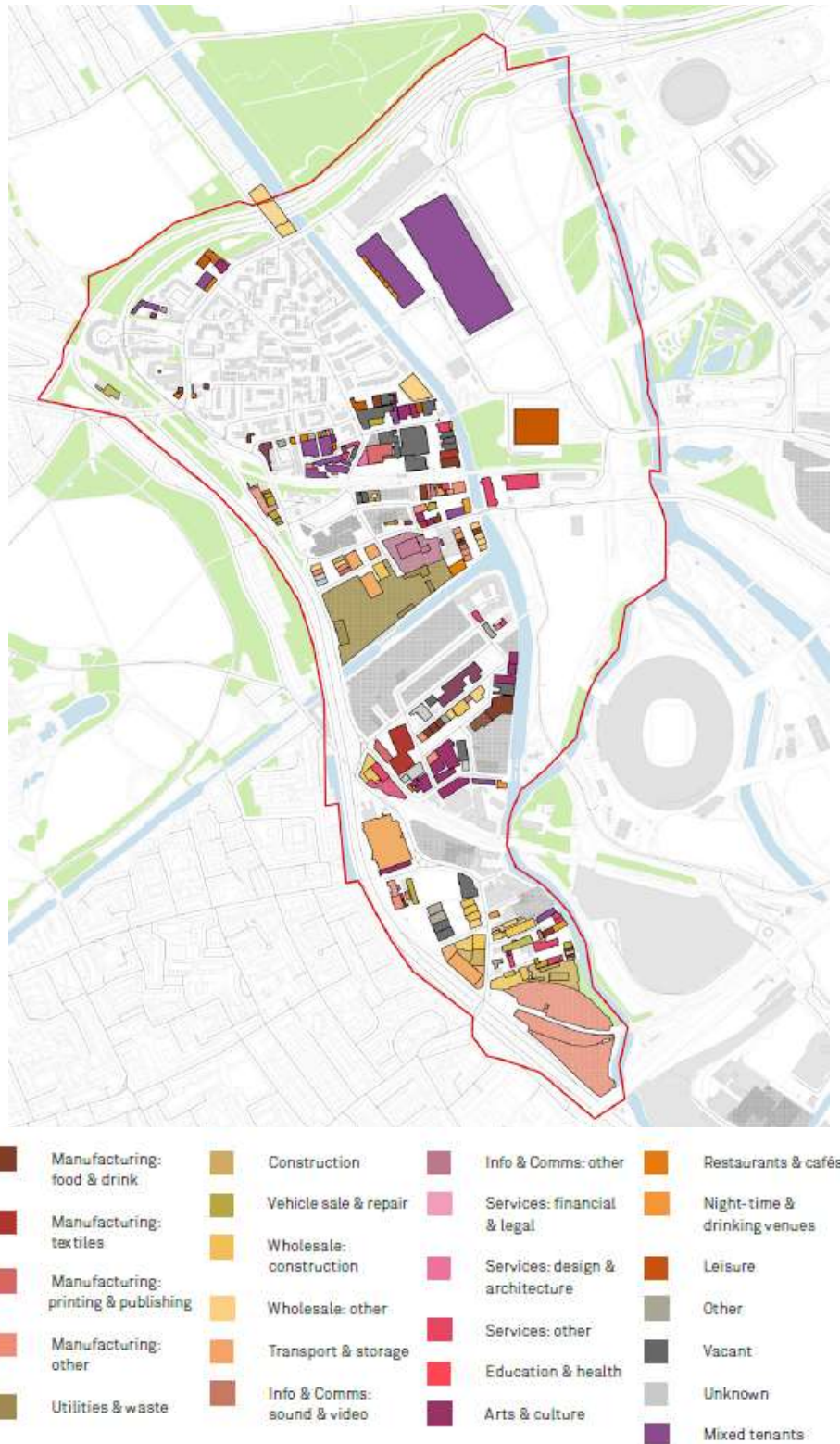
4. Creative, Cultural and Night Time Activity: Sub-Area Analysis

- 4.1 The LLDC area as a whole is diverse and its sub-areas have their own characteristics and evolving offer. Having looked at the sectors more generally, this section looks at each of the sub-areas in turn, considering the make-up of the creative and cultural sectors, the creative workspaces and cultural assets that exist in each location.
- 4.2 Hackney Wick and Fish Island is the most significant and most diverse area in terms of this activity. As a result, this area has the most discussion in the section below.

Hackney Wick and Fish Island

- 4.3 Of all the sub-areas, Hackney Wick and Fish Island has the highest concentration of creative activity. The business survey estimates that 81% of all creative activity in the LLDC area is located in Hackney Wick and Fish Island. The area is acknowledged as a creative hub and has could become one of the first Creative Enterprise Zones for London.
- 4.4 The 110-active creative and cultural businesses in Hackney Wick and Fish Island operate across multiple sectors. Around a third are in sound and video activity, with another third being arts and culture led. Information, communication, design, architecture and creative services are also present.
- 4.5 Formal artists' studio provision provided by multiple operators including Space, Cell Projects, Arbeit / Arbyte and Stour Space provide workspace for over 200 artists.
- 4.6 Artists' workspace providers, along with the restaurants, bars and assembly spaces enable a cultural and creative output that is recognised nationally. The density of creative activity that is still present in the centre of the sub-area allows for community groups to be self-sustaining in a way that supports growing and nascent creative businesses.
- 4.7 The contrast between the creative workspaces and activity on Fish Island, more recent larger scale activity at HereEast and forthcoming development in Hackney Wick town centre, means that this area is legitimately one of London's most important and dynamic clusters of creative and cultural activity.

Figure 4.1 Business Activity Hackney Wick & Fish Island



Source: We Made That, 2017

4.8 Case studies illustrating difference in spaces are set out below:

Figure 4.2 Creative and Cultural Workspace Focus: V22 Crown Close, Hackney Wick



V22 Crown Close

Address: 5 Crown Close

Business: Workspace provider

Workspace: Mixed

Employees: 59 artists, 34 other users

V22 is a publicly-owned art organisation with a shared ownership structure. They specialise in the collection of contemporary art, the production of exhibitions, events and educational initiatives. V22 is also a large-scale workspace provider with mixed occupants over separate sites in London.

V22 occupies the ex-commercial part of the building at Crown Close, where Big Yellow self-storage occupies the other large industrial space. The mix of users includes an established architecture practice, musicians and artists, a Luxury knitwear/street-wear fashion label, a film production company and an industrial designer. On the site, there are 46 units making up nearly 13,000 sq. ft of workspace. These are occupied 59 artists and 34 other individuals involved in creative activity. The average rate for a workspace is £274.00 per month.

V22 have occupied the building on a rental agreement, secure for a minimum of 10 years since 2015. When they moved in, they renovated the space; installing partition stud walls, a new electric supply and distribution, plumbing, new drainage, roof repairs and fire alarm installation. This was all undertaken by V22 at its own cost.

Source: WMT, LLDC Business Survey 2017

Figure 4.3 Creative and Cultural Workspace Focus: HereEast Campus



HereEast

Address: Queen Elizabeth Olympic Park

Business: Workspace provider

Workspace: Mixed

Employees: Currently 2,200 but expected to increase to 5,000

HereEast brings business, tech, media, education and industrial innovation together on one site, providing light industrial, studio, office and assembly space. 18 current occupant businesses range from bars and restaurants to broadcasters and universities. Over 2,200 people are estimated to be working from HereEast across the 1.2 million sq. ft of workspace, with secure long-term leases.

Both Loughborough University and UCL have established satellite campuses at HereEast. This brings a number of students and research activities to the site, such as the UCL Robotics lab, and exchange and partnership programmes with local employers and further education institutions, such as the Hackney Community College Technology City apprentices programme.

Creative activities across a number of sectors are present at HereEast. Studio Wayne McGregor, with around 20 full-time staff, provides 1,600m² of creative arts space. In coming years SPACE studios will develop artists' workspace on site. BT Sport has three TV studios, a control centre, 20 edit suites and an audience area. In 2017, Ford Smart Mobility also located to HereEast, which is a dedicated a dedicated Smart Mobility Innovation Office in London focusing on future mobility solutions for Europe.

Source: WMT, LLDC Business Survey 2017

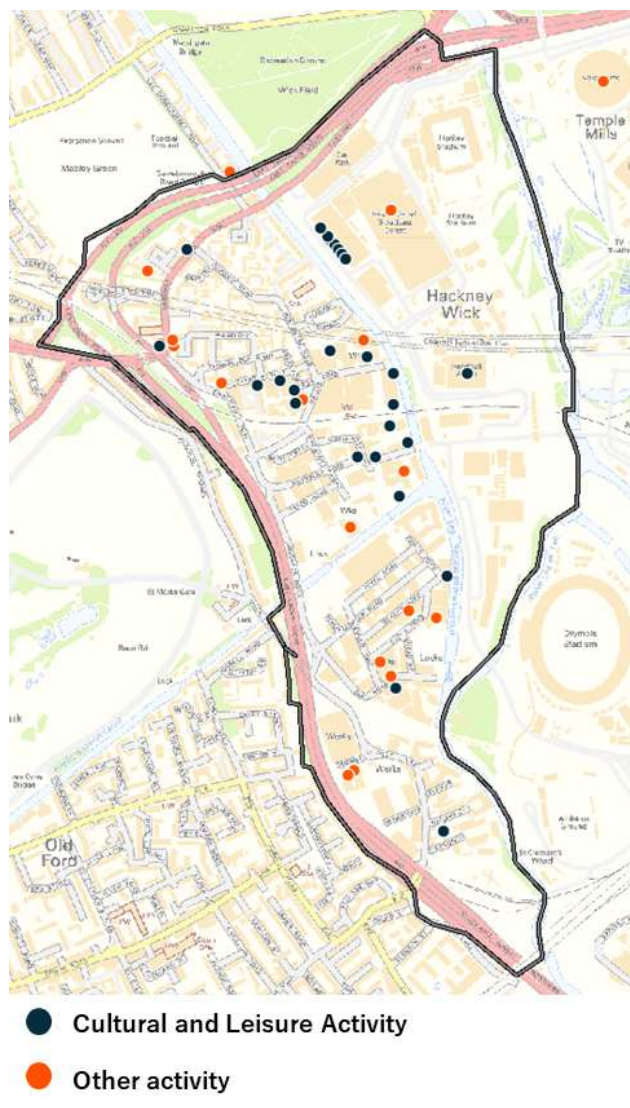
Culture, Leisure and Night-Time Activity in Hackney Wick

4.9 Hackney Wick and Fish Island has the largest number of businesses operating during the cultural, night-time and leisure sectors in the LLDC area (except for Westfield).

4.10 Alongside bars and restaurants, there are a number of venues which provide a cultural offer. The Yard Theatre is a live music/production venue which hosts live events every day of the week. It also has a café-bar, which contributes to the financial sustainability of the organisation and supports audience development and community participation. The Hive also offers live performance space for cabaret, circus and arts exhibitions.

4.11 Typically, spaces include gallery or assembly space in combination with workspace. These ancillary spaces are a good way of giving workspace and small industrial uses a public face and create additional viable uses. Often these are workspace providers with a history in creative activity themselves and there is provision for close professional support networks for their tenants. As such they have a good understanding of the spatial / operational requirements of their tenants / future occupiers and help stimulate business development (see also 'Implications and Considerations' in Section 5.)

Figure 4.4 Night-Time Activity - Hackney Wick & Fish Island



Source: Regeneris / WMT Business Survey 2017

Night-Time Economy

- 4.12 In Hackney Wick and Fish Island, the night-time activity comprises both culture and leisure along with other business/commercial activities. These include bars and restaurants, as well as manufacturing and logistics operations that operate throughout the night.
- 4.13 Artists' studios and live/work complexes also contribute to the area's night-time economy, typically offering 24-hour access and spaces for more small-scale night-time arts and events programming, including open studios, showcases and performances. These are further supported by local event / programmable spaces like Stour Space, Bloc and Swan Wharf.
- 4.14 Case studies below that highlight the different types of activity that are present in the area.

Figure 4.5 Creative Workspace and Cultural Amenity Focus: Yard Theatre



Yard Theatre

Address: Unit 2A, Queens Yard, White Post Lane

Business: Theatre & bar/kitchen

Workspace: Small industrial space

Employees: 20

The Yard Theatre moved to Queens Yard, Hackney Wick in 2013. It was completely self-built through recycled materials in just over eight weeks, offering an innovative model for new cultural organisations which are open, engaging and convergent of cultural, social and commercial activities. The venue has a 110-seat capacity theatre and the Yard Theatre runs and manages a community hub (Hub67), which is available for hire. The organisation has a strong connection to community, with the hub conducting social engagement work with young people and operating as a neutral civic space.

The Yard includes a producing theatre, and is listed by the GLA as one of 94 grassroots music venues. In April 2018, it is set to be a National Portfolio Organisation for Arts Council England – which gives the organisation strategic endorsement and medium-term investment which will greatly enhance its financial sustainability. Events occur on every day of the week, with the theatre space typically open in the afternoon and evening, and music events running from 10pm until 4am.

The business reports some concerns around a more mainstream and congested night-time offer in Hackney Wick could have on their business model, with a risk of dispersing the market for the café-bar. They have a desire to stay in the area, especially as they are very socially embedded into the local area and community. Plans are underway to develop a new build Yard theatre as part of a larger residential development. This provides a major opportunity to secure the long-term presence of a critically acclaimed and innovative cultural organisation which in turn can help shape a night-time offer which is relatively inclusive and family-friendly.

Source: Yard Theatre

- 4.15 Other live venues include Mick’s Garage and Bloc nightclub, which host DJs, club nights and music events every weekend. These often host late night events, with Bloc nightclub open until 6am.
- 4.16 Consultees suggest that these late-night venues are important creative and cultural assets in the area and contribute to the placemaking of Hackney Wick; offering a mix of experiences unavailable in most parts of London.
- 4.17 There are small number of restaurants in the Hackney Wick area. This offer has been supplemented in the last year with opening of a number of bar/restaurants at HereEast and the growth of the residential population around the Queen Elizabeth Olympic Park.
- 4.18 Locations such as Howling Hops, Shane’s and Crate offer food and drink, which are ancillary to the main brewery operation onsite. This ‘shop-front’ function continues the tradition of more ‘bottom-up’ development of creative and food and drink businesses, providing greater authenticity to the area offer as well as allowing businesses to increase profile and access new markets.

Figure 4.6 Howling Hops



Source: Howling Hops

Figure 4.7 Shane’s @ HereEast



Source: HereEast

- 4.19 Hackney Wick and Fish Island is a well-established location for leisure, although (according to the recent resident survey) it does not draw the same number of residents to the area as Westfield does. Overall, 7% of all LLDC residents visit the sub-area for leisure purposes however, 20% of all Hackney Wick and Fish Island residents use the area as their main leisure destination.

Other Activities

- 4.20 As well as cultural and leisure activities, there are other night-time activities within the area that contribute to the night-time economy. The types of other night-time activity in

Hackney Wick & Fish Island include food production and wholesale, manufacturing, recording studios and events catering.

Figure 4.8 Night-Time Economy Focus: H. Forman & Sons



H. Forman & Sons Salmon Smokehouse

Address: Stour Road

Business: Food production and restaurant

Workspace: Large industrial space

Employees: 80

Established in East London since 1905, H. Forman & Sons is a family-run salmon smokehouse and Britain's oldest original salmon curer. Everything is made to order, and the salmon arrives at the smokehouse within 48 hours of being harvested in Scottish lochs. The business has a long connection with the LLDC area. It moved into Queens Yard in the 1990s, and then to Fish Island & Hackney Wick as part of the delivery of the 2012 Olympic Games. Their new site is now home to their smokehouse, gallery, head office and the Forman's London restaurant open until 11pm Thursdays-Saturdays. The business supplies smoked salmon to some of the top restaurants in London and around the world and has its own production kitchen which creates pre-prepared, restaurant quality dishes. Their product now has protected status. The 'London Cure Smoked Salmon' is the only smoked salmon in the world with this status, and the first ever food or drink in London to achieve this recognition.

Source: H. Foreman & Sons

Hackney Wick and Fish Island – Summary of Primary Research Findings

- Hackney Wick and Fish Island continues to have the highest average employment density across the LLDC area, including the Hackney Wick SIL area which is operating at an employment density well beyond the London average for industrial land. Instances of multi-story buildings, Stratford Workshops on Burford Road for example, provide high levels of employment density in individual sites
- Average business across these broad sectors employs 12 people, larger than is suggested within the government data on business base
- Businesses report few problems in recruiting people with the correct skills. However, more traditional trades such as vehicle repair and maintenance report some problems in recruiting
- Diversity of activity in the Hackney Wick area is attractive to businesses and is an important part of the identity of the wider LLDC area

- Proximity to the markets of central-east London was an attractor to people working in the area
- Businesses state that ongoing construction and re-development in the area is putting pressure on both occupancy and operation
- Of those businesses expecting to leave the area over the next year, a third report the loss of workspace as the cause for this
- Whilst new development poses new opportunities for the area, some businesses surveyed are concerned that new developments may not provide comparable flexibility and affordability in their offer
- The Retail & Leisure Study recognises the importance of the creative sector and the presence of independent cafes and restaurants, which create a vibrant offer and a good base for a unique and new neighbourhood centre
- Perceptions of safety in the area has been acknowledged as an issue within the business study, and retail and leisure study.

Future Evolution of the Creative and Cultural Activity in Hackney Wick and Fish Island

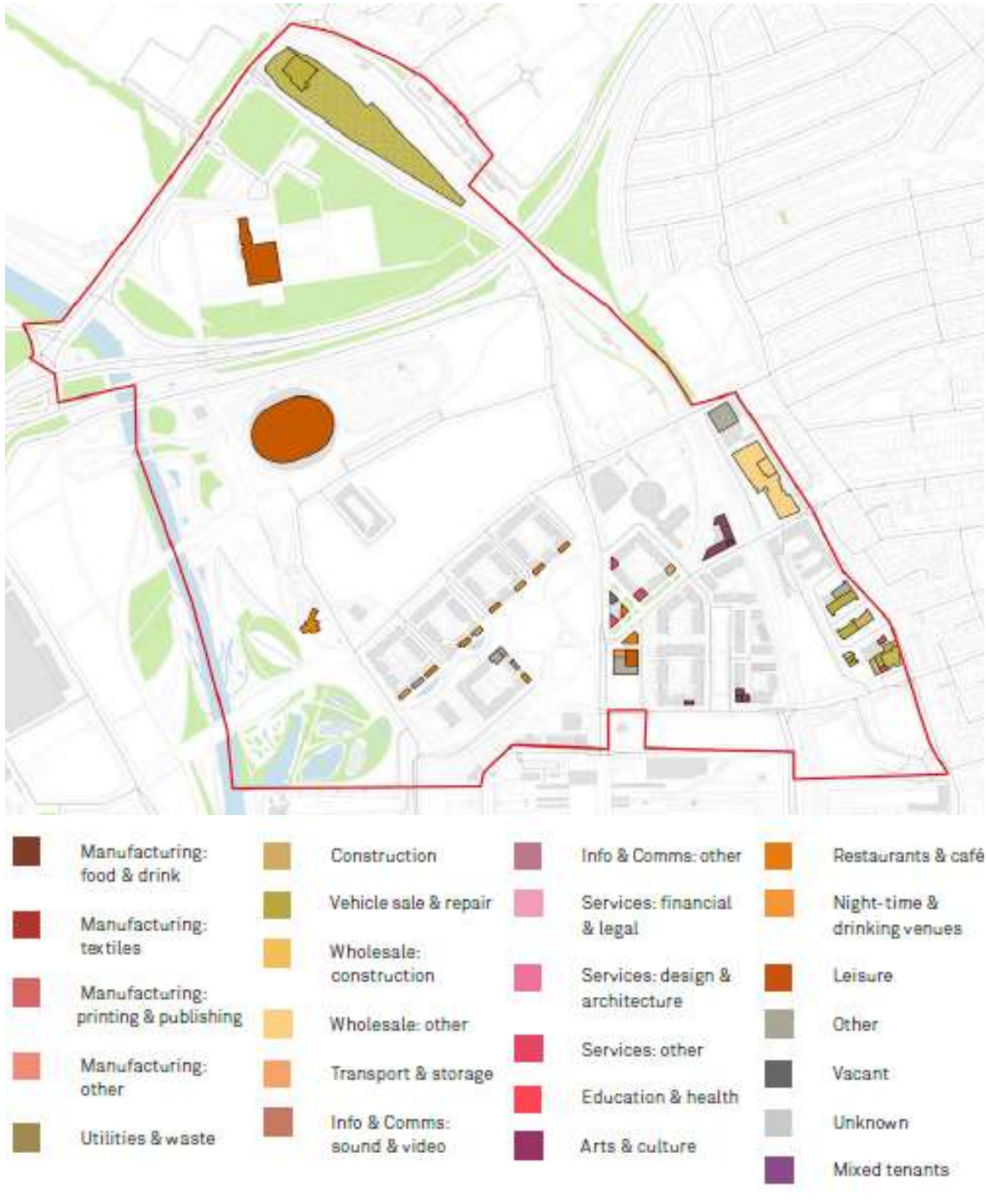
- 4.21 Future activity in Hackney Wick and Fish Island will increase capacity and diversity of the offer in the area. Development of Hackney Wick and Clarnico Quay will increase the amount of space for this activity, whilst the proposed Creative Enterprise Zone designation will help to protect, curate and enhance activity.
- 4.22 Further details of future plans and their implications can be found in Section 5.

North Stratford and Eton Manor

- 4.23 North Stratford and Eton Manor is the only sub-area that does not currently have any tangible creative activity present. The area has a relatively small business base, with retail; leisure and small-scale service activity apparent in the area.
- 4.24 The type of workspace present does not appear to preclude future creative activity in the area however, the retail and leisure amenity offered by East Village and Lee Valley VeloPark, alongside proximity to HereEast and Hackney Wick, could attract visitors from these locations and stimulate some growth in the creative sector here in the future. Indeed, as

housing delivery is realised, the area may also support more homeworking, as a way to incubate creative activity in the area.

Figure 4.9 Business Activity North Stratford & Eton Manor



Source: We Made That, LLDC Business Survey 2017

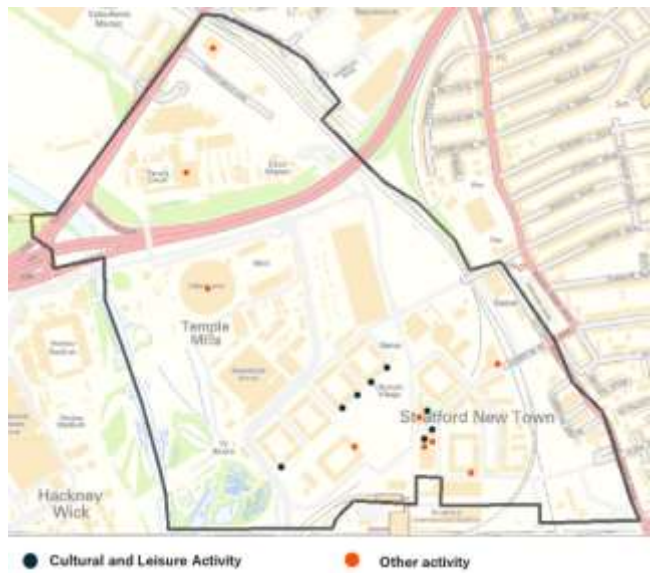
Culture, Leisure and Night-Time in North Stratford and Eton Manor

4.25 The area is largely one of new development and hence is evolving in terms of its cultural and amenity offer.

4.26 Whilst there are no recognised cultural venues, this sub-area does have two major leisure venues in the Lee Valley VeloPark and Lee Valley Hockey & Tennis Centre. Both venues are open to the public seven days a week for cycling, tennis and hockey activities.

4.27 The venues also host major sporting events, such as the Women’s Hockey World Cup in 2018 and annual Six Day cycling event. The area’s amenity offer is located around the East Village development, which is the areas local centre. As this part of the LLDC area evolves, so could the local centre, by providing a more established and distinct offer to that of Westfield and Hackney Wick.

Figure 4.10 Night-Time Activity - North Stratford & Eton Manor



Source: Regeneris/We Made That Business Survey 2017

Night-Time Economy

4.28 While residential development at North Stratford and Eton Manor is ongoing, retail, leisure, restaurant and bar activities have begun to open on the E20 site. This has led to the sub-area having the largest proportion (43%) of all business operating during the night-time economy. The sporting facilities at the VeloPark and Hockey Centre operate into the evening and are providing an additional amenity to the growing neighbourhood.

4.29 There are 18 businesses that operate during the evening or night time. The types of business serve the local residential population and are mainly based in the retail and food & drink sectors. The growth in night-time activity could be set to continue based on the planned increase in events and audiences at the VeloPark and Hockey Centre.

Figure 4.11 Leisure Amenity Focus: Lee Valley VeloPark



Lee Valley VeloPark

Address: Abercrombie Road

Business: Sporting Venue, Gym and Cafe

Workspace: Assembly Space

Employees: 35 permanent FTE; with significant temporary employment for events.

The VeloPark is 6,000-seater velodrome that was built as part of the 2012 Olympic Games. Lee Valley VeloPark is the first place in the world where you can take part in four types of cycling in one place: Track cycling, road racing, BMX or mountain biking – with the indoor velodrome being the fastest track in the world. The venue offers the opportunity to both spectate at professional cycling events and participate in a range of pay-and-ride or bookable cycling activities. The VeloPark also offers an onsite velogym and café which are also open to public seven days a week.

Source: Lee Valley Leisure Trust Limited

4.30 Through selection and favourable lease structures, East Village successfully curated and accommodated an independent offer similar to that found in Hackney Wick and Fish Island (albeit in more formal purpose build retail spaces). This include the likes of Tina We Salute You, Darkhorse and Santi, all of which operate until 12am.

Figure 4.12 Tina We Salute You (E20)



Source: Tina We Salute You

Figure 4.13 Darkhorse



Source: CityAM

4.31 Whilst there is a cluster of bars and restaurants within this sub-area along with the VeloPark and Hockey Centre, the sub-area’s close proximity to the Westfield Centre, is a significant draw for residents (62%) living here. In total, only 4% of LLDC residents surveyed visit this area for leisure purposes and 6% of residents who live in this sub-area, use this area for the main leisure activities.

Other Activities

- 4.32 The other night-time activity in the area is focussed around the growing resident population which include; dry cleaners, pharmacy, supermarket, a gym and wine shop.

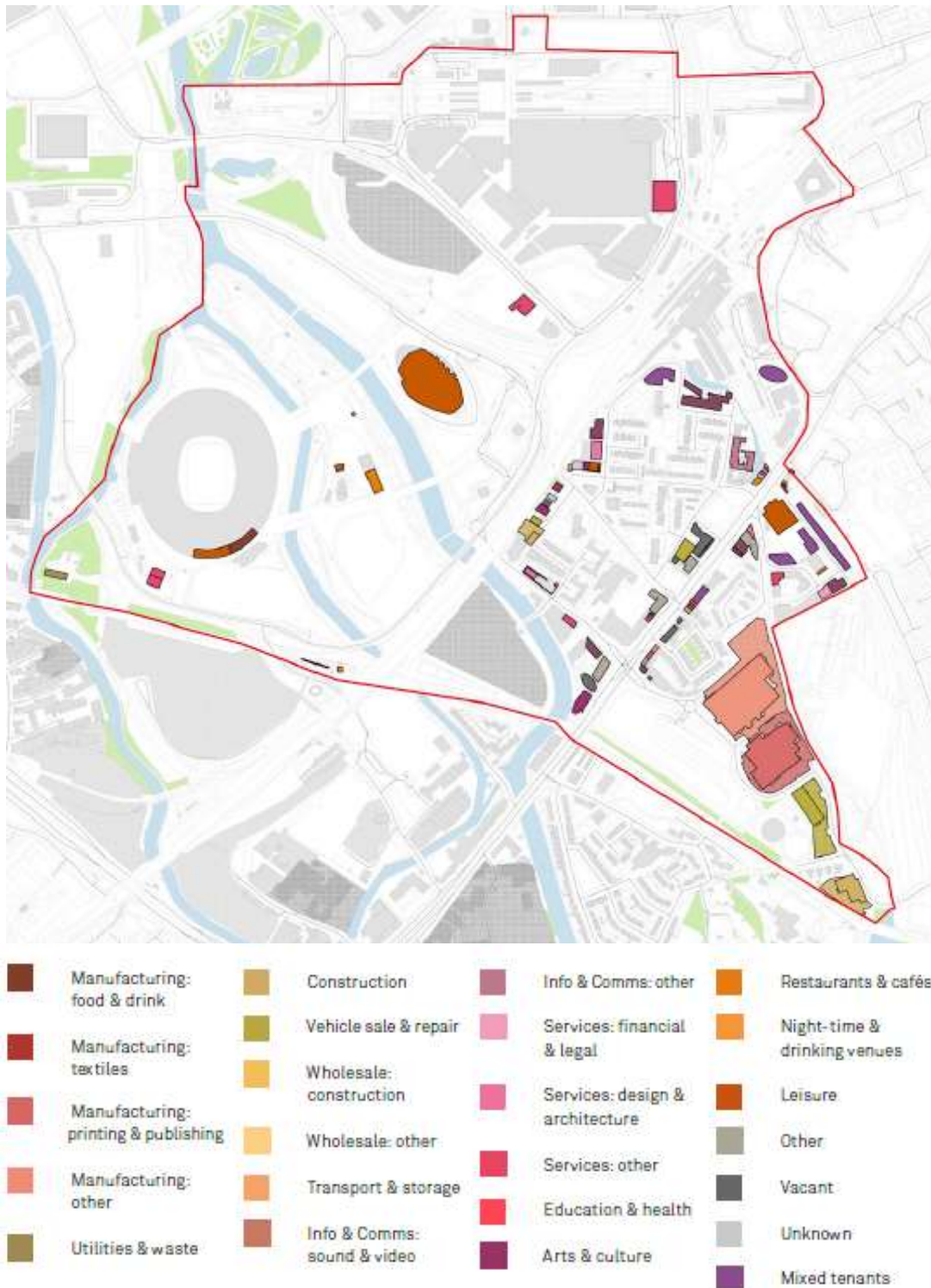
North Stratford & Eton Manor – Summary of Primary Research Findings

- The area has the lowest average employment density across the LLDC area
- Businesses on average employ 12 people
- Businesses tend to serve the growing residential population and are dependent on the continued increase in population to support their growth; for some this is not happening fast enough which is impacting upon their ability to trade and grow
- The Retail & Leisure Needs Assessment identifies the East Village as an emerging centre, which has a vibrant, community feel. The study also acknowledges the growing leisure offer in the area, which is focussed around cafes, bars and restaurants.

Central Stratford and Southern Queen Elizabeth Olympic Park

- 4.33 The economy of this sub-area is dominated by Westfield and its retail and leisure offer. It is however, also home to some creative activity and more historic sectors which support the creative and cultural economy.
- 4.34 There are 20 businesses engaged in creative activity in the sub-area, primarily working out of the Stratford Workshops site and the northern edge of the Carpenters Lane estate. Like Hackney Wick and Fish Island, much of this activity is more historic and has evolved from the 'bottom up' rather than being a direct result from public sector or significant private investment.

Figure 4.14 Business Activity: Central Stratford & Queen Elizabeth Olympic Park (including Westfield)



Source: We Made That, LLDC Business Survey 2017

4.35 Creative and cultural production activity is present locally in manufacturing, information, communication, design, architecture, sound, video and other services. Overall, 45% of the

creatively active businesses are in the arts and culture sector. The Rowse Close & Warton House artists' studios by Acme provide workspace for 83 artists.

Figure 4.15 Creative Manufacturing Focus: Gibbins Road, Central Stratford and QEOP



Kandor Modelmakers

Address: Gibbins Road

Business: Architectural model-making

Workspace: Large industrial space

Employees: 22

Kandor is a leading architectural model maker that works with many of the leading architectural practices in London. Producing 5-10 architectural models a month, their operations and 22 employees moved to their site on the edge of the Carpenters Lane Estate from Clerkenwell in the summer of 2017. Most employees do not live locally and the majority travel to work via public transport.

Having been founded and based in central London since 1981, Kandor moved to the LLDC area in order to find enough accessible floor space necessary for their work at an affordable rate, whilst retaining connections with central London architectural practices. The business has existing links to the HereEast development.

They are finding it easy to recruit and expected to grow slightly in coming years. Proximity to Stratford station and the Westfield development was raised as the primary amenity to the independent business's employees. However, they recognised that the Carpenters Lane Estate is somewhat isolated from its neighbouring areas.

Source: WMT, LLDC Business Survey 2017

Culture, Leisure and Night-Time in Central Stratford and Southern QEOP

4.36 Unsurprisingly, Westfield dominates the culture, leisure and night-time offer in the sub-area. Indeed, it is also the main draw for visitors to the LLDC area and location for local residents.

4.37 The London Aquatic Centre is located here and provides a significant leisure offer along with the Carpenters & Dockland Centre, which provides a gym and sports facility for the local community.

4.38 According to the recent household survey, this sub-area is well used by local residents for leisure purposes. However, the leisure activity that is happening in this sub-area is focussed upon Westfield.

4.39 Westfield is a large attractor, with almost 50% of all LLDC residents visiting the centre as their main leisure destination.

Figure 4.16 Night-Time Activity - CSSQEOP



Source: Regeneris/We Made That Business Survey 2017

Figure 4.17 Community Culture and Leisure Focus: Carpenters & Dockland Centre



Carpenters & Dockland Centre

Address: 98 Gibbins Road

Business: Community Centre and Gym

Workspace: Large industrial space

Employees: 13

Carpenters & Dockland Community Centre opened in June 1972. Located a short walk from Stratford tube station and the Olympic Park, Carpenters & Dockland Centre is a youth, community and social centre providing valuable services to a wide range of residents in the local community. Its facilities include a sports hall, judo training room and meeting rooms.

Source: Carpenters & Dockland Centre

Night-Time Economy

- 4.40 Overall, around 15% of businesses in this area operate within the night-time economy, primarily cafés, restaurants, cinema, hotel and retail businesses. There are 74 businesses that operate beyond 8pm. Of these, 49 (66%) are located within the Westfield Shopping Centre.

Other Activities

- 4.41 Culture and leisure is responsible for the vast majority of night-time activity in the area, there are however, a small number of business in other sectors that operate within the night-time economy. These include security and crowd management, textile manufacturing, charities and food production.

Central Stratford and Queen Elizabeth Olympic Park – Summary of Primary Research Findings

- The average business in the area employs 26 people, largely as a result of the presence of Westfield, which would suggest there is demand for larger units within this area
- Most businesses surveyed report that the location is good, along with the amenities and transport options, although some businesses outside of Westfield are moving out of the area as a result of the redevelopment of their current premises.

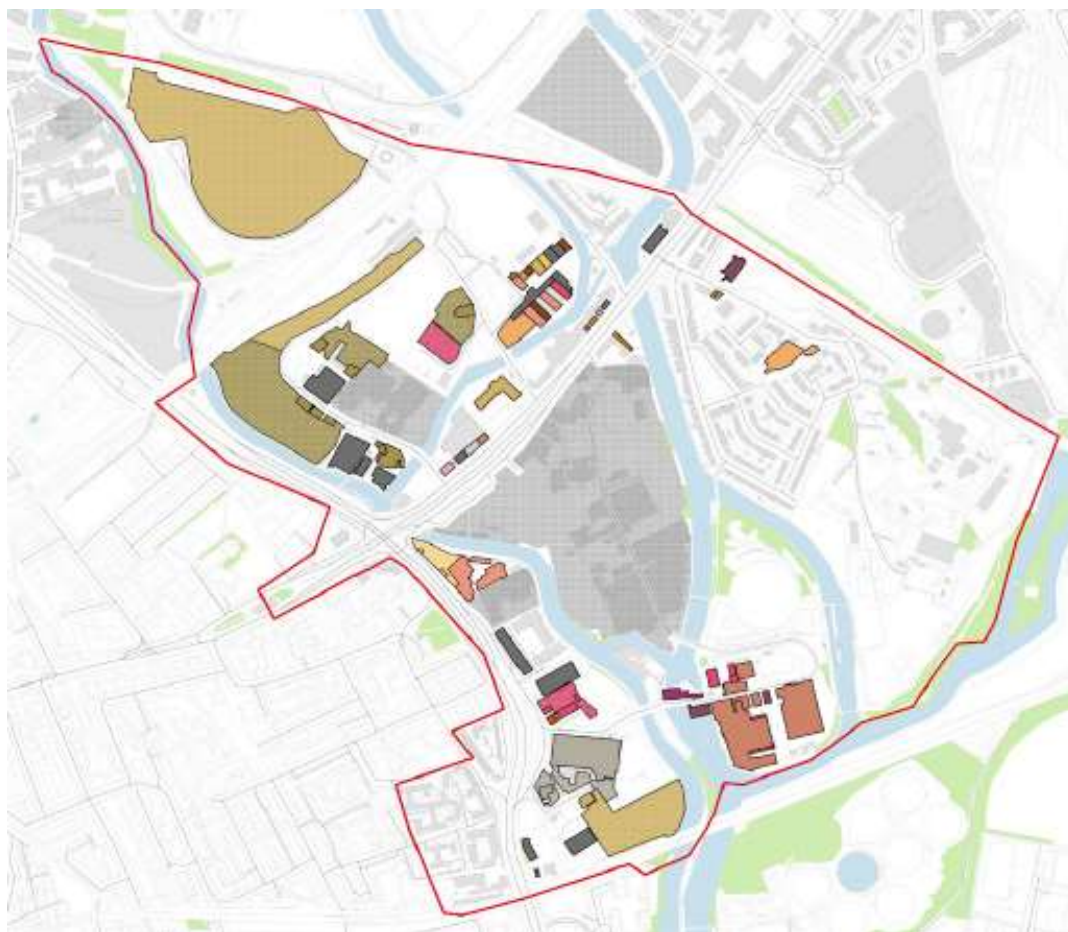
The Future Evolution of Creative and Cultural Activity in Central Stratford and Southern QEOP

- 4.42 In addition to the current offer, this sub-area will also be the home to the Cultural Education District (CED). The CED is the most significant investment in the culture and creative sector planned within the LLDC area. It will include space for UCL East, UAL, Victoria and Albert Museum and Sadler’s Wells (amongst others).
- 4.43 The redevelopment of Carpenters Estate and evolution of Stratford High Street, may also provide opportunities to accommodate more ‘fringe’ cultural activities, which act as a counter to the more mainstream/commercial offer of the CED.
- 4.44 Further details on this can be found in Section 5 of this report.

Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Meads

4.45 The six businesses engaged in creative activity across the sub-area, all work in film/television production. These are split between Three Mills Studios and Marshgate Lane.

Figure 4.18 Business Activity: Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Meads



Source: We Made That, LLDC Business Survey 2017

- 4.46 Three Mills Studios reputation has continued to grow over the last two decades and today houses production of international film projects and TV shows for terrestrial and streaming services as Netflix. The creative industries present are closely linked both culturally and physically with those in Hackney Wick and Fish Island to the immediate north.

Figure 4.19 Creative Anchor Focus: Three Mills Studios



Three Mills Studios

Address: Three Mill Lane

Business: Various

Workspace: Small industrial space / Large Industrial Space /
Assembly Space / Workshop Space

Employees: 8 tenants with c. 50 employees

Three Mills Studios is an iconic production destination situated on Three Mills Island close to the emerging Bromley-by-Bow town centre. With 9 filming stages, 11 theatre spaces and over 75,000 sq. ft of filming space along with a number of smaller sub-units and workshops.

The studios are currently occupied by a range of creative businesses and activity including; Film and TV production, Photography, Screen Acting School and other supporting services such as catering, camera hire and casting. The studios have been responsible for the production of major television, film and theatre productions such as; MasterChef, 28 Weeks Later, Lock, Stock and Two Smoking Barrels and We Will Rock You.

Source: Regeneris Consulting, LLDC Business Survey 2017, Three Mills Studios

Culture, Leisure and Night-Time in Bromley By Bow, Three Mills and Pudding Mill

4.47 Currently, there is limited culture and leisure business activity in the sub-area. This is unsurprising given that the area had historically been industrial and is currently being planned or developed.

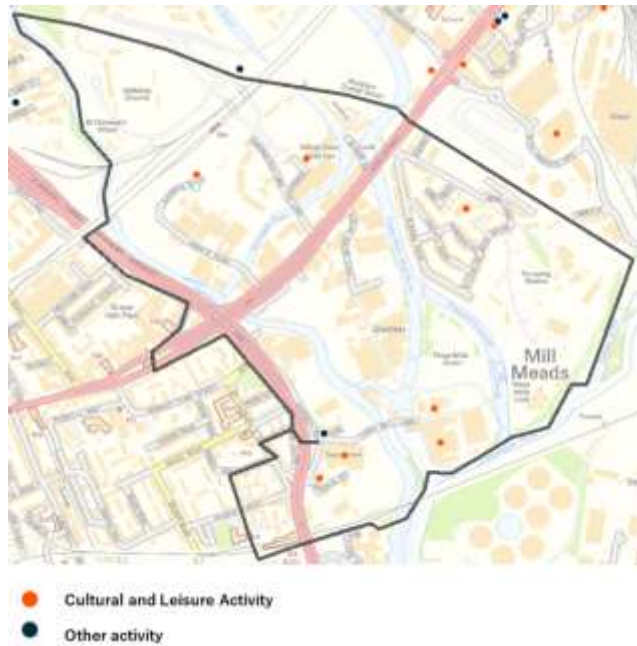
Night-Time Economy

4.48 Only eight businesses operate during the night-time economy: the smallest number of any sub-area.

4.49 The night-time activity in this area is minimal, with a large proportion of activity being focused around the Tesco supermarket and Three Mills Studios.

4.50 The Bridge holds a late-night licence with many events finishing at 6am.

Figure 4.20 Night-Time Activity – Bromley-by-Bow, Three Mills & Pudding Mill



Source: Regeneris/WMT Business Survey 2017

Figure 4.21 The Bridge



The Bridge

Address: 28 Hancock Road

Business: Nightclub/event space

Workspace: Retail space

Employees: 25

The Bridge is a reformed space located in Bromley-by-Bow. The space features two main floors, each

with outdoor areas. With a license until 5am, it hosts club nights, live music, film screenings and private parties. The venue has capacity for up to 500 people standing.

Source: Hire Space Website

- 4.51 Based on the most recent Household Survey, only a small proportion (4%) of residents in this area, stay within a 5-10 min walk of their home for leisure activities. The vast majority (40%) of residents visit Westfield for leisure purposes, with the remainder visiting other areas of the LLDC area or London.

Other Activities

- 4.52 The production studios at Three Mills, Royal Mail, Tesco and tailoring services are the other form of night-time activity in this area.

Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Meads – Summary of Primary Research Findings

- Average business employs 14 people
- Location, proximity and transport links are recognised by businesses as key strengths of this sub-area
- The Retail & Leisure Needs Assessment also acknowledges that the area is highly accessible via public transport. However, it is poorly linked to other areas and nearby residential developments
- The safety of the area was also highlighted as an issue within the Retail & Leisure Needs Assessment.

The Future Evolution of Creative and Cultural Activity in Bromley By Bow, Pudding Mill, Sugar House Lane and Mill Meads

- 4.53 The Bromley-by-Bow Supplementary Planning Document (SPD) references Bromley-by-Bow's site allocation, which will be a mixed used area accommodating community spaces and new employment-generating business space in a range of sizes and formats. A number of space typologies have been identified² for the area as a District Centre, including large and small creative studios, maker spaces and incubator spaces.
- 4.54 Pudding Mill SPD aims to create a coherent identity and vision for the area. Both documents suggest that as the CED and other prominent institutions within the LLDC area are delivered, Pudding Mill will be well located to provide valuable support space for many of these research and innovation activities.

² Based on the LLDC Employment Space Study, 2015; Aecom and We Made That

Stratford Town Centre

- 4.55 Whilst Stratford Town Centre is not within the LLDC area, its close proximity and contribution to the diversity of the local culture, leisure and night-time economy, should be acknowledged.
- 4.56 As Stratford Town Centre was not included within the business survey, however, desk-based research has been carried out to explore the cultural and night-time activity within the area. This suggests there are in the region of 25 businesses operating within the night-time economy, of which 20 are culture or leisure related.

Cultural and Leisure

- 4.57 Stratford Town Centre has well-established culture and leisure offer, with two theatres and a cinema - the Theatre Royal, the Stratford Circus Arts Centre and Stratford Picture House.

Figure 4.22 Cultural Focus: Theatre Royal



Theatre Royal

Address: Gerry Raffles Square

Business: Theatre & bar

Workspace: Assembly Space

The Theatre Royal in Stratford East was built in 1884 as Stratford's first permanent playhouse. It is located just outside LLDC, but has a long-established history of providing a cultural

offer to the area, and has become an important element of the local night-time economy.

The Theatre Workshop Bar is open Monday to Saturday from 5pm, and stays open to 12am on Friday and Saturday nights. It offers live entertainment; top DJs and all bar events are free to attend. There is a strong connection with the local Newham community, particularly young people aged 12-24. The Theatre offers weekly youth theatre clubs and summer colleges, and engages with local schools and colleges.

Source: Hire Space Website

- 4.58 The centre has a number of pub and bars, as well as a range of restaurants. These range from fast-food chain restaurants located within the Shopping Centre to independent restaurants around the Broadway area. Roof East, which offers food and drink and evening entertainment was opened a few years ago as a meanwhile use for the top floor of the Stratford Centre car park. The Discover Children's Story Centre is distinct as a local cultural facility which focusses specifically on young people.

4.59 The Rex is a historically and culturally significant venue which has operated as a theatre, cinema, bingo hall live music venue and nightclub since 1896. It has been closed since 2013 and offers considerable potential with appropriate management as a cultural hub/music venue of regional significance.

Figure 4.23 Stratford Circus Arts Centre



Source: Stratford Circus Arts Centre

Figure 4.24 Roof East



Source: Roof East

Other Activities

4.60 There is a limited number of other activities operating within the night-time economy. The businesses that are active during the evening/night time are bookmakers and taxi operators.

Stratford Town Centre – Summary of Primary Research Findings

- The Retail & Leisure Needs Assessment acknowledges that whilst Stratford Town Centre is complemented by its close proximity to Westfield, although this does create pressure and competition for the older town centre. Current Venuescore rankings currently signifying a distinct gulf between the two centres (Westfield = 26th / Stratford Town Centre = 326th)
- Partners feel that the cultural and night-time economy in Stratford Town Centre is under appreciated, although the centre itself lacks distinct cultural identity
- Consultees identified a disconnect between cultural and night-time offer in Stratford Town Centre and the rest of the QEOP and wider LLDC area.

5. Creative and Cultural Activity in Future Development

5.1 Current and proposed development will have a significant impact upon the future of the Creative and Cultural economy in the LLDC area. This section details the expected evolution in the business base and assets that are due to arrive in the area and considers how this will affect the offer in the future.

Culture and Education District (CED)

5.2 Located in Stratford Waterfront, the CED is the most significant creative and cultural development in the LLDC area and arguably London as a whole. It will be home to a number of well-established and prestigious educational and cultural institutions.

Figure 5.1 Cultural and Education District



Source: QEOP (2017) UCL East Phase 1

NB: The CED is comprised of Stratford Waterfront (purple) and UCL East (blue)

5.3 Partners aspire to create a world-class education and cultural district that will bring together organisations to showcase art, dance, history, craft, science, technology and cutting-edge design.

5.4 There are a number of major tenants who are expected to locate to the CED following its completion.

Table 5.1 Cultural and Education District Anchor Tenants

Institutions	Overview and Relevance to Creative Industries
Sadler's Wells	<ul style="list-style-type: none"> Plans to create a 7,000m² venue with a 600-seat dance theatre. The new venue will provide flexible 'making' spaces for research and development and producing new work, facilities for a Choreographic School, and for a Hip-Hop Academy.
Victoria & Albert Museum	<ul style="list-style-type: none"> The "V&A E20" will occupy 20,000m² and will present the museum's collections in never-before-seen ways, enhancing access to 1000 years of design, architecture, art and performance and encouraging public participation to the museum activities.
UCL East: Marshgate Development	<ul style="list-style-type: none"> Marshgate development consists of an 8-10 storey building set over 360,000 sq. ft containing major academic facilities. Construction of shell and core and public realm will be procured and delivered by LLDC.
UCL East Pool Street Development	<ul style="list-style-type: none"> Pool Street development consists of two buildings rising to 17 and 14 storeys above a two-storey podium. This will contain student and staff accommodation providing 400 bed space and 45,000 sq. ft of academic space.
Smithsonian Institution	<ul style="list-style-type: none"> The Victoria and Albert Museum and the Smithsonian announced plans to develop, a plan for a jointly organised permanent gallery space as a key part of V&A East.
University of the Arts London: London College of Fashion	<ul style="list-style-type: none"> The UAL will create a 32,000m² research and education hub for the global fashion industry. The site will host 6,500 staff and students with specialisms in fashion. The new campus will include two major research centres focusing on sustainability and innovation in the fashion industry. It will provide access to advanced fashion technology, business incubators, and a changing programme of public exhibitions.

East London Fashion Cluster

- 5.5 The range of creative institutions locating to the CED has led to the district being identified as the fulcrum for the East London Fashion Cluster (ELFC), with the London College of Fashion at the epicentre. The ELFC was initiated by London College of Fashion and is supported by the GLA, UK Fashion & Textiles Association (UKTFA), BFC (British Fashion Council), LLDC and Poplar Harca.
- 5.6 The ELFC partnership aims to capitalise on east London's historic and re-emerging status as a centre for fashion innovation, design, manufacture and retail, as well as the opportunities presented by the imminent relocation of the London College of Fashion to Stratford Waterfront.
- 5.7 A number of other assets within the LLDC area will play a key role in the ELFC, along with other interventions that will be focussed around the CED and wider LLDC area. A summary of the ELFC, important assets and opportunities is detailed below.

East London Fashion Cluster (ELFC)

The ELFC is a current priority within the Mayor of London's Draft Economic Development Strategy. Key assets and interventions, linked to the CED and the ELFC include:

- **UAL London College of Fashion** – the hub for the cluster; with 6,500 staff and students which will include two major research centres focusing on sustainability and innovation in the fashion industry.
- **Plexal (HereEast)** – innovation hub supporting start-ups in the development of technology in various areas including fashion.
- **Fashion Innovation Playground** – a hosted challenge fund accelerator programme with the purpose of promoting collaborative R&D between technologists, designers, researchers and SMEs across sectors.
- **Fashion Tech R&D Showcase** – a showcasing space shared between the CED institutions. Creating an intensity of collaborative relationships across disciplines, institutions and sectors.
- **Fashioning Poplar** – partnership between LCF and housing associations Poplar Harca supported by GLA funding, located within the new Poplar Riverside Housing Zone and provide a spoke operation for LCF in its new CED Hub.
- **Fashion Workspace Alliance** – A brokerage 'service' to connect local authorities, developers and fashion businesses to a range of workspaces in East London.

The partnership has developed a broad-ranging Action Plan to support the sector. It aims to tackle a range of structural issues facing the sector, including access to finance, affordable space and skills. The aim is to create a more resilient fashion sector in London with the capacity to innovate across the value chain.

UCL East

- 5.8 Along with the location of LCF at the CED, the University College London (UCL) is proposing a new Future Living Institute, which will be a multi-disciplinary institute cutting across five different faculties. UCL East will explore global challenges such as planetary sustainability, understanding nature, environment and urbanisation, global communications, and social inclusivity.
- 5.9 To complement the educational offer, an overarching priority for the CED is community integration and to ensure local residents and businesses are benefiting from world-class education and creative & cultural activity in their neighbourhood. Community integration should aim to provide local residents and businesses opportunities such as: jobs, education and supply chain links.

Figure 5.2 UCL: Future Living Institute

The **Experimental Engineering Labs**, which will provide new academic activities covering a wide range of unique and innovative fields of study. A centre for Robotics & Autonomous Systems will offer the opportunity to build robots from the nano to large scale and model their environments.

The **Global Disability Innovation Hub**, which will bring together cutting edge technology and lived experience. Academics, innovators, corporates and the local community will explore disability from a new perspective.

The **Culture Lab**, which will offer teaching, research and engagement spaces, underpinned by new programmes in making, media, conservation & heritage, and public history. Facilities at Pool Street West will include an object-based learning laboratory and a London Memory Archive.

Nature-Smart Cities Labs, which will be a research and teaching centre, focusing on three key themes: enhancing biodiversity of cities; understanding urban ecosystem services & wellbeing benefits; and engaging urban populations with their natural environment.

The **Urban Room**, as part of the **Global Future Cities Co-Labs**, which will be a major public and community space, hosted by urban academics from across UCL, for debating the past, present and future of London. The Co-Labs will provide opportunities for the application of knowledge towards the improvement of human settlements worldwide.

Source: UCL Concept Design Roadshow

Cultural and Education District (CED): Implications and Considerations for the LLDC Creative, Cultural and Night-time Economy

The CED will be a major creative and cultural anchor of international significance. This will change the profile of the offer in the local area as well as adding value for London. Based on project proposals and discussions with partners, the following potential impacts have been noted:

- **Agglomeration** – the development of the CED will provide opportunities for further clustering of creative activity. The broader holistic offer provided by UAL will also encourage cross-cutting and collaboration relating to innovation, sustainability and engineering. However, this opportunity will only be truly realised through the development of strong relationships and networks between the CED and other local

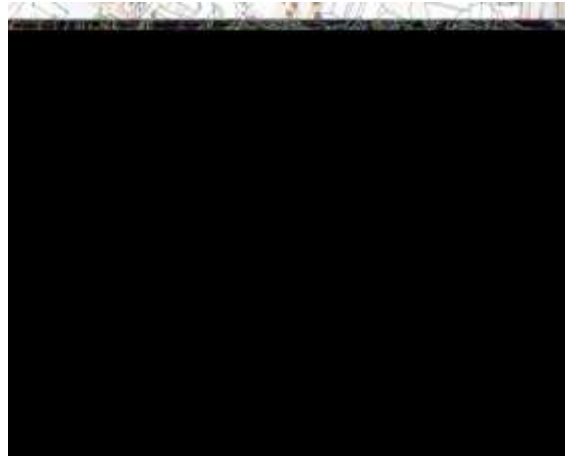
businesses across the wider LLDC area. There is also the opportunity for spin-outs and start-ups from the CED to establish themselves in other locations across the LLDC as affordable workspace is provided.

- **Employment and supply chain opportunities** – new employment and supply chain opportunities will be supported as a result of the CED. Community engagement and integration is key to ensuring that these opportunities are realised by existing residents and businesses in the LLDC and wider areas.
- **International recognition** – globally-recognised institutions locating to the area will enhance the LLDC brand and support the vision of the area becoming an internationally recognised culture and leisure destination.
- **Educational integration**– the presence of LCF and UAL campuses in the area will augment the educational offer in this part of London. It is important that these institutions have a community presence and work closely with local residents and businesses to ensure the opportunities for the local area are maximised.
- **New cultural & leisure opportunities** - the development of a Culture and Education District is a distinct opportunity to link together many cultural and night-time assets. For example, the new museums offer should be perceived as part of the night-time economy, with the opportunity to stretch out traditional daytime activities and encourage active use into the night which is attractive to audiences of all type. The new student population moving and studying in the area will also increase demand for new leisure and night-time provision.

Hackney Wick Central

- 5.10 The Hackney Wick Central masterplan will deliver over 30,000m² of arts and business space along with improved public spaces to shape the future of Hackney Wick’s dynamic and creative neighbourhoods. The development also proposes 874 new homes, over 4,000m² of retail use and up to 2,300m² of community uses.
- 5.11 The outline planning application (16/00166/OUT) proposes almost 20,000m² of B1a office space which is a significant increase based on what is currently present in the area.
- 5.12 As well as B1a office, the application proposes over 10,000m² of B1c (light industry and studio space), with over 8,400m² offered as affordable workspace, via capped rents and providing secure leasing arrangements.
- 5.13 A core aim of the masterplan is ensuring long-term sustainability of creative industries in the application site.

Figure 5.3 Hackney Wick Central



Source: <http://karakusevic-carson.com/work/hackney-wick-central-masterplan>

Implications and Considerations for the LLDC Creative, Cultural and Night-Time Economy

Hackney Wick and Fish Island has already been identified as the most significant and diverse cluster of creative and cultural activity in the area. This provides momentum and opportunity, but also a challenge in balancing current activity with new investment. Considerations in responding to this include:

- **Heritage and Place Identity** – the redevelopment of Hackney Wick Central will lead to the loss of existing buildings and workspaces, which are part of the fabric of the area’s identity. Careful consideration needs to be given to the design of proposed development, ensuring it preserves the area’s creative character and sense of place, as per the considerations detailed in the LLDC Employment Space Study, 2015 (See Section 8).
- **Changing Dynamics, Networks and Public/Creative ‘Goods’** – the introduction of formal office space (B1a) to area could change the dynamics of creative activity in

Hackney Wick. As more formalised and fashionable space is occupied, a new type of tenant may be attracted to the area. Managed properly, this could however, dovetail with the existing offer, providing something more diverse, sustainable, and resilient in the future. Management that sustains local identity, changing dynamics and affordable workspace is often built on models of shared ownership, non-profit or charitable status. These management structures give consideration to the outcome of all activities, both commercial and non-commercial, to create long-term value. Key to this is the dichotomy of activities that generate profit and those that generate value. i.e. Loss-making events programs sustained by profits from workspace rental, or vice versa. The direct exchange of resources between activities mean increased resilience to changes in the economic market or local business environment. Local governance or shared ownership can ensure the organisation is directed in the best interest of the locality. This can be seen in the work of artists' workspace provider SPACE, and the creative industries workshop provider Bloc and Stour Space. Another example is Plexal, a workspace provider that caters to start-ups, innovation enterprises and academics. They provide space for up to 800 individuals and also have an event space, a significant communal space and amenity, and their own innovation programmes including a disability accelerator in partnership with the Global Disability Innovation Hub and neighbouring UCL.

- **Re-provision of affordable space** – as the quality in the stock of employment space in Hackney Wick & Fish Island (HWFI) improves, there is a risk that the rental values will increase, therefore the provision of affordable workspace is crucial. This will ensure that the HWFI area is still a hotbed for creative SMEs, start-ups and local businesses. It will also ensure preservation of the cultural and leisure activity which is intrinsically linked to the creative economy within this area.

Strand East

- 5.14 Forming a triangle south of High Street, Stratford, with the River Lee Navigation to the west and the Three Mills Wall River to the east, Strand East will be a landmark mixed-use development consisting of residential dwellings, employment space and retail and leisure (including a hotel).
- 5.15 There are current plans (12/00336/LTGOUT) for c. 35,000m² (based on current commitments) of B class floor space, of which is flexible B1 workspace. It is envisaged that the flexible workspace could be provided as part of this development; increasing supply of this type of space in the area and relieving pressure on existing space in places such as Hackney Wick.
- 5.16 This area is currently limited in terms of its cultural, leisure and night-time offer however, the residential, retail and commercial development proposed will drive demand for leisure and night-time activities within the area. It could also help bolster the existing creative activity in and around Three Mills.

Figure 5.4 Strand East



Source: <https://www.brydenwood.co.uk/projects/strand-east/s4051/>

Implications and Considerations for the LLDC Creative, Cultural and Night-Time Economy

Strand East is a significant development that could transform an area where creative and cultural activity is mainly linked to Three Mills Studios. The Strand East presents an exciting opportunity to improve the vibrancy of this subarea and its connections to the wider LLDC area.

- **Destination and Placemaking** – the additional flexible workspace, retail and leisure will help support the placemaking of this area, helping it develop into an established day-time and night-time destination. The proposed hotel included as part of the

development will also attract visitors and help establish both a leisure and night-time offer.

- **Supply of Flexible Workspace** – the Strand East development also proposes a quantum of flexible workspace and workshops. This will help increase supply of increasingly limited workshop space which could complement the creative activity present in Hackney Wick and Fish Island and future activity from the CED. The proposed provision of flexible workspace at affordable rates, will support start-ups, SMEs and potential spin-outs from the CED. The additional supply in affordable space will also help address the limited supply of affordable space identified in the recent Business Survey (Part B) carried out as part of this study.
- **Link to wider Creative, Cultural and Leisure activity** – the regeneration of this area and the introduction of new activity will help strengthen the wider creative, cultural, and leisure offer across the LLDC area. The redevelopment of the area also involves improving linkages to the rest of the LLDC area and the QEOP, which will not only enhance physical links but intellectual links with the rest of the area.

International Quarter London

5.17 The International Quarter London (IQL) is a major mixed-use development and economic driver for growth within the LLDC area. There is currently over 400,000m² of B1 floorspace committed in the development pipeline for the IQL. Whilst the focus of the IQL development (10/90641/EXTODA; 07/90023/VARODA) is concentrated on the provision of large scale Grade A office space, there will also be opportunities for leisure and night-time activities.

Figure 5.5 International Quarter London



Source: <https://www.internationalquarter.london/>

Implications and Considerations for the LLDC Creative, Cultural and Night-Time Economy

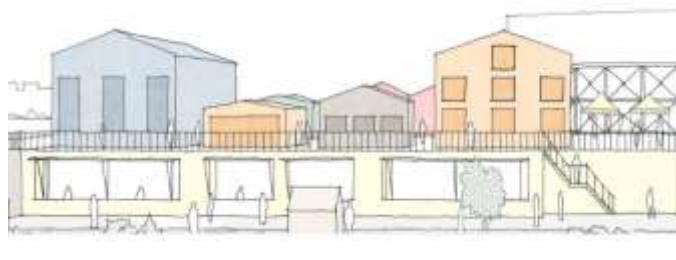
Whilst the focus of the IQL development is predominantly large-scale office, the wider impact the development could have on the creative, cultural and night-time economy could be significant.

- **New market for cultural and leisure** – the IQL will support thousands of new jobs and bring and critical mass to the area daily. The number of visitors to the area will increase dramatically, as will the demand for bars, restaurants, theatres and other cultural and leisure activities.
- **New Employment and Supply Chain Opportunities** – Similarly to the CED, a host of employment and supply chain opportunities will be supported as a result of the IQL. Whilst the IQL development may have a less of a creative and cultural focus than the CED, there will still be a role for creative and innovative businesses to support some of the larger-scale organisations located at IQL. Community engagement is key to ensuring that these opportunities are realised by existing businesses and residents in the LLDC and wider areas.

Clarnico Quay (Hackney Wick & Fish Island)

5.18 Clarnico Quay is a temporarily vacant space situated between the Copper Box Arena and Hackney Wick. MakeShift (the company behind Peckham Levels and Pop Brixton) are conducting a research and design study to explore how the temporarily vacant space can offer different kinds of workspace for small businesses and local creative workers.

Figure 5.6 Clarnico Quay



5.19 MakeShift aim to transform derelict areas and empty buildings into new communal spaces that offer lasting opportunities to small businesses and local people.

Source: MakeShift, Clarnico Quay

5.20 Current proposals include a space that provides a mix of creative workspaces, units for food, drink and events businesses, community spaces, horticultural space and shared public facilities.

Implications and Considerations for the LLDC Creative, Cultural and Night-Time Economy

Clarnico Quay provides an opportunity to influence, support and curate the creative and cultural offer immediately adjacent to QEOP. This could potentially bridge the boundary between Hackney Wick and Fish Island and the more formal offer of HereEast and QEOP generally. This provides several opportunities which could be realised:

- **Opportunities for SMEs, Start-ups and local businesses** – the development will provide affordable workspace for creatives, SMEs and local businesses. It will also will support the development of further critical mass of activity around Hackney Wick and HereEast.
- **New Leisure & Night-Time Opportunity** – Clarnico Quay will provide a range of food and drink units along with event space. This will provide more of a critical mass of night-time and leisure activities, linking established leisure hotspots at HereEast and Hackney Wick.
- **Ability to Influence and Embed Activity** – Based on the previous experience of Makeshift-led and other meanwhile uses, Clarnico Wharf should provide

opportunities to influence the connection of local people to opportunities within the Creative and Cultural Sectors.

Bromley-by-Bow Supplementary Planning Document (Including Appended Masterplan)

- 5.21 The SPD references Bromley-by-Bow's site allocation as a mixed-used area accommodating community spaces such as libraries and new employment-generating business space in a range of sizes and formats. The document details a range of appropriate typologies for the area as a District Centre, taken from the Employment Space Study conducted in 2015, these include large and small creative studios, maker spaces and incubator spaces. Moreover, the SPD references notable Local Plan policies pertinent to the creative and cultural industries, citing the re-provision of employment uses (B1) and the provision of low cost and managed workspace (B4).

Pudding Mill Supplementary Planning Document (Adopted March 2017)

- 5.22 The SPD sets out the spatial direction for Pudding Mill, with the aim to create a coherent identity and vision for the area. The paper notes a series of opportunities, several of which are pertinent to the creative and cultural industries, including Pudding Mill being well located to benefit from business linkages and support space to the soon to be delivered Cultural and Education District. Moreover, the SPD references notable Local Plan policies pertinent to the creative and cultural industries, citing the re-provision of employment uses (B1), the provision of low cost and managed workspace (B4), and connections to higher education, research and development (B6).

Implications and Considerations for the LLDC Creative, Cultural and Night-Time Economy

Bromley by Bow and Pudding Mill provide opportunities for LLDC and partners to influence the provision of creative, culture and leisure spaces in ways that could add value for the wider area.

- **Legacy Spaces** – Both locations could offer opportunities to deliver legacy spaces for artist studios and creative workspaces which are currently threatened in Hackney

Wick and Fish Island. Working with developers to connect them to these operators and ensure that spaces are fit for purpose could be a key coordinating role for LLDC.

Need for Distinctiveness – In their current form, the masterplan documents promotes an offer which is quite generic and similar to that which is proposed (in terms of leisure, culture and workspace) to other developments locally and in east London as a whole. Being more definitive and, in some cases supporting more diversification and risk in non-residential uses has the potential to add value to the existing local offer.

6. Strengths & Challenges

- 6.1 Based on the research carried out as part of the Combined Economy Study, along with extensive consultation with local businesses, stakeholder organisations and land owners; a number of strengths and challenges for the creative, cultural and leisure offer have been identified.

Strengths




Diverse offer of creative, culture and leisure activity across the area

- 6.2 The LLDC area has wealth of creative, cultural and leisure activity ranging from the more commercial offer linked to the Westfield Stratford City and the QEOP, to the independent offer in Hackney Wick and Fish Island.
- 6.3 The LLDC area is unique in its offer, having major attractions such as the London Stadium, the VeloPark and Copper Box Arena alongside new innovative locations such as HereEast and the more established areas such as Hackney Wick and Three Mills.
- 6.4 This broad spectrum of activity within such a confined area is not seen anywhere in London and already attracts a large number of visitors. This unique offer provides a significant marketing and branding opportunity. By harmonising and enhancing this offer, will attract more people to the area, supporting further growth in these sectors.

A spectrum of flexible, accessible workspace across the LLDC area

- 6.5 A distinguishing feature about the LLDC creative offer is the full spectrum of creative space that is provided – something that is rare in a single location in London. The LLDC's longstanding industrial spaces and artist studios, alongside new office development has produced a broad cross section of creative workspace.
- 6.6 The concentration of creative workspace and artists space located in around Hackney Wick is also closely linked with the cultural and night-time activity, with a number of galleries and food and drinks venues located in joint spaces such as Stour Space and The Yard. This is also true of the more contemporary creative spaces such as HereEast which offers leisure space in the form of cafes, bars and restaurants alongside start-up and maker space.
- 6.7 Below, a range of creative workspaces are detailed, illustrating the range of space and the differing needs they cater for.

Table 6.1 Spectrum of Creative Workspace

			
Typology	Grass Roots, Artistic focus	Diverse Uses, Public Facing, Workshop offer	Modern, High Tech, Start Up Space
Business Users	Individuals, Micro-businesses	Individuals, Micro-businesses, SMEs	Large Scale Firms, Start Ups
Profile	SPACE Studios - Britannia Works Address: 43-45 Dace Road Business: Artists' Studios Workspace: Workshops Employees: 74 Artists	Stour Space Address: Roach Road Business: Event space, cafe and studio space provider Workspace: Small industrial space Employees: 78 tenants across workspaces	HereEast Address: Queen Elizabeth Olympic Park Business: Workspace provider Workspace: Mixed Employees: 2,200 (estimated)

The broad range of workspace types provides accommodation for a range of creative businesses which creates diversity and resilience within the area. This potentially provides a platform for greater innovation, collaboration and agglomeration locally.

An attractive place for people to live and work

- 6.8 There are a range of new businesses that have moved into the area over the last five years. Services and arts and culture businesses are the most common recent arrivals to the area, including design services, maker and photography activities.
- 6.9 The majority of these arrivals are smaller-scale SMEs or individual artists/makers, many of whom have relocated into managed studio workspaces in Hackney Wick and Fish Island. New leisure, food and drink amenities are clustered around the E20 neighbourhood and HereEast. Typically, these 'new arrival' businesses employ ten people or less.

- 6.10 Formal artists' studio provision centred mainly in Hackney Wick & Fish Island offer workspace for over 200 artists. These artists' workspace providers, along with the restaurants, bars and assembly spaces enable a cultural and creative output that is recognised nationally.
- 6.11 In some instances, creative workspace providers offer public-facing amenities such as cafés and event spaces which blend, living, working and leisure, enhancing a local sense of identity (See Stour Space Case Study below). These flexible 'cross over' spaces enable occupiers to innovate and pilot new activities as well as providing the opportunity to generate income when necessary. Retail and gallery elements of spaces can provide opportunities for exposure and profile for creative businesses.
- 6.12 The role of the Queen Elizabeth Olympic Park with its green spaces and leisure offer is further contributing to the destination offer of the park. Its continuing development offers further appeal to the area and has anecdotally made it easier for local businesses to attract workers to the LLDC area. Some partners have suggested however, that more could be done to integrate the area's creative community into the park (through improved connectivity, public art and locally curated creative and cultural events on the park).
- 6.13 The recent Retail and Town Centre Needs Assessment³ states that the current provision of leisure in the area is good and that the combination of the commercial and cultural elements within the LLDC area will contribute significantly to the visitor economy of the area.
- 6.14 The broad range of assets and activities available within the LLDC, are attractive to residents, employers and employees. The creative, culture and leisure sectors will continue to act as potential attractors for the rest of the area, supporting the occupation of other spaces across the LLDC and driving footfall.
- 6.15 As other marquee institutions arrive in the area, ranging from major multinational businesses, to arts and culture-focused organisations to education providers, it is likely that the perceptions of LLDC as a place will further improve. The diverse range of uses on offer will allow the LLDC area to attract visitors from further afield, from a wider range of age groups and with a broader set of interests, all of which is conducive to creating a more vibrant sense of place.

³ LLDC Retail and Leisure Needs Assessment (2018)

Figure 6.1 Stour Space, Hackney Wick



Stour Space

Address: Roach Road

Business: Event space, cafe and studio space provider

Workspace: Small industrial space

Employees: 78 tenants across workspaces

Stour Space is a social enterprise company and a focal point for community events and activity on Fish Island. The business was a founding member of the Fish Island Community Cultural Interest Group.

Stour Space occupies a small industrial space which itself has been broken down into smaller workshop units. 78 people work from the site, with 600 people on a waiting list for workspaces. Users and patrons of the space currently come from across London, the UK, Europe and abroad.

An estimated 8,000 people engage with Stour Space in any given month. Around 95% of people working on the site live locally (within the five Olympic boroughs) and the board of directors is majority female and includes BME representation.

There are one and a half years left on Stour Space's lease, and despite how much of an institution it has become locally over its eight years, there is no certainty around its future. The level of construction across Fish Island has been disruptive to the business and they wish for a better relationship their local authority, with respect to licencing and business support measures.

Source: WMT, LLDC Business Survey 2017

Creative Community and Collective Action

- 6.16 Across the LLDC area, businesses report a variety of community links, from formal supply chains to information sharing and artistic collaborations. At the micro level, artist studio tenants and local resident artists have collaborated with cultural venues like the Yard Theatre and Stour Space.
- 6.17 In common with other creative spaces in London Stour Space offers regular makers markets and open workshop days. It provides community workshops in specific disciplines such as film-making and Claymation; it also provides well-being Workshops for local people.
- 6.18 The Yard Local is a programme for neighbours, for young people in particular. Housed at a temporary community centre, Hub67, in the they run creative projects for young people aged 4-19 years and offer regular activities and resources for local people. As summary is provided below.

Figure 6.2 Summary of Yard Theatre Local Offer



Source: Yard Theatre 2018

- 6.19 Associations like Creative Wick Community Interest Group and Hackney WickED have become an active part of the community, bringing residents, businesses, and creative and artistic practices together in collective planning and promotion of the Hackney Wick and Fish Island neighbourhoods. Within the Business Survey carried out as part of this study, a number of business highlighted the importance of these and other community groups to the area.
- 6.20 Shared workspace and studio complexes like Stratford Workshops and Autumn Yard are particular sites of collaboration between local businesses. Proximity and clustering of similar or associated industries at these sites has supported project-based collaborations both between tenants and with other local businesses. Other businesses report links to co-

working and incubation spaces like 90 Main Yard which have been sustained beyond the businesses tenancies in these spaces. This is often informal, albeit supported through soft-networking and 'meet-ups' organised by space providers. This is not intended as business support per se, but does provide opportunity for peer to peer support and discussion. There are no examples of workspace providers collaborating to link these networks together.

- 6.21 Proposals for redevelopment within Hackney Wick have been met with a degree of resistance by the creative community who have organised themselves to retain the area's creative identity. Whilst this collective action is a challenge to specific plans, it also emphasises the deep rooted local creative community network (alongside the residential community) and the attachment that the local community and creatives have to Hackney Wick and Fish Island.
- 6.22 This collective action should not be exclusive to Hackney Wick and could be encouraged across the wider LLDC area, including long term local residential communities. The role of the Hackney Wick & Fish Island Developer and Business Engagement Officer has helped ensure local businesses and residents are involved in the future development of Hackney Wick and Fish Island. Resource to do this in other areas could yield positive results and stronger, more embedded networks.

Harnessing value from collective action

- 6.23 Closer collaboration amongst businesses across the whole of the LLDC area would also help inform the design of new developments and the type of space provided. By doing so, helping meet the needs of businesses, strengthening the creative and cultural sector further. This can be achieved in the following ways;
- **Local managed workspaces, incubator and co-working spaces supporting an ecosystem of workspace.** For example: F6S, an internationally-acclaimed start-up platform and support business successfully grown out of a workspace unit at 90 Main Yard early in 2017, now work from an industrial unit in Queens Yard which has been converted to suit their more desk-based operations.
 - **Local making and creative businesses supplying growing leisure uses.** For example, the Hackney Wick Boulder Project is a new leisure and sports venue space. The climbing space includes a small café space, which is supplied by a number of local food & drink manufacturers. The business shares its industrial unit with gallery and studio space provider Arbyte, who sub-let the space to the business. The space includes commissioned artworks from well-known local artists on the walls. The

community feel and links to local artists is a key attraction of the area for the business's founders and staff.

- **Resource sharing.** On the Hamlet Industrial Estate, a cluster of food wholesale and production businesses share space and skills. Three small-scale food production and catering businesses operate from one small industrial unit which is rented from neighbouring food wholesale business German Deli, which has previous employment ties with some of the occupiers. Canababes, Hackney Deli and Vadasz Deli share the loading, storage and mezzanine office space in the unit, and have-subdivided the floor space into individual workspace and preparation sections.
- **Creative services.** For example, creative design and service businesses report collaborations with businesses who work from neighbouring workshop units. On Fish Island, for example, post-production business Cranrust VFX have collaborated with others based in neighbouring units in Autumn Yard; and in Stratford Workshops on Burford Road, graphic design business C+S Digital works closely with many other tenants in the building and undertake collaborative projects with these neighbours.

Links to neighbouring areas and economies

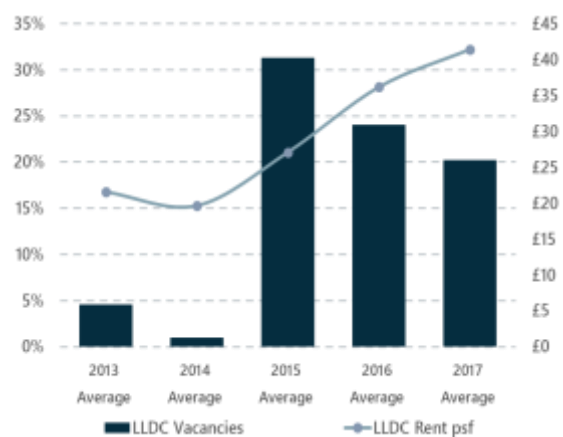
- 6.24 Creative production and design service businesses report links to businesses in neighbouring boroughs through supply chains and customer bases whilst charities report links to community and educational organisations across the Olympic growth boroughs, including engagement with local schools. Some businesses also report close links to local Hackney freelancer networks in order to staff and support project-based work and other commissions.
- 6.25 SPACE, the largest provider of artists' workspace in the LLDC area, runs creative learning projects with schools, young people and communities in the area. For example, Urban Voices is SPACE's three-year programme, working with young people aged 14 to 18 who are excluded from mainstream education or who are NEET. The programme has involved a range of partners: Hackney Community College, Newham PRU – Education Links, Studio Wayne McGregor at HereEast and Individio.
- 6.26 These early links show the growing importance of the creative economy locally and its increasing role as a fulcrum for other activities locally. As new projects such as the CED, Productive (Lea) Valley and Thames Estuary Production Corridor evolve, the LLDC creative economy has the potential to influence and add value to these.

Challenges

Recent rises in commercial rents and low vacancy rates

- 6.27 Increasing rent is one of the greatest concerns for existing businesses and in particular those operating in the creative sector. Over 30% of businesses in Hackney Wick stated they were considering moving out of the area in the next 12 months. Such losses could lead to a dilution of diversity within the creative economy in particular.
- 6.28 LLDC has relatively cheap office rents compared to London, although these have been increasing dramatically over the last five years. Office average rents in the LLDC area are currently around £42 per sq. ft, a cheaper rate than that seen across London (£48 per sq. ft).
- 6.29 Since 2013, office rents in the LLDC area have increased by 92% compared to only 34% in London (see Figure 6.3 and Figure 6.4), suggesting a rapidly increasing demand for employment space in the area.
- 6.30 Whilst vacancies in office units in the LLDC area increased to 2015, so has the supply of space, this is largely as a result of the HereEast site offering over 1.2 million sq. ft of new flexible office and retail space. However, the increasing uptake of this space, especially by new businesses (including BT Sport), has contributed to the subsequent decline in vacancy and rising rents.

Figure 6.3 Office Vacancy and Rents 2013 - 2017 LLDC Average



Source: CoStar Data 2017

Figure 6.4 Office Vacancy and Rents 2013 - 2017 London Average



Source: CoStar Data 2017

6.31 The LLDC 'Business Workspace Study' (SQW, November 2016) observed this trend, suggesting that there has been increased demand for more flexible workspace based on growth in the the area. The report concludes that this demand is set to increase based on LLDC policy priorities to drive these sectors. The types of flexible workspace that may be appropriate are as set out in the LLDC Employment Workspace Study, 2015 which identifies the following key features:

- Let as individual desks pace or workspace within a unit from an Incubator Accelerator Co-working provider
- Leasing agreement generally more flexible or short-term than conventional office space or managed workspace
- Providers require adequate floorspace to sub-divide into appropriate workspace units (typically 5-50 desks).

With typical uses including:

- Start-ups, early-stage businesses
- SMEs and micro businesses more reliant on non-local trade
- Social enterprise hubs
- Freelance / part-time workers (often in creative sector services).

6.32 There is also increasing evidence that industrial space is increasingly constrained and the New Draft London Plan (2017), adopts a significantly more protectionist position than its predecessor. With a number of industrial sites, some of which are linked to creative production; increased demand and cost of industrial space could also present a challenge in relation to affordable space.

Disparate and Disjointed Creative, Cultural and Leisure Offer

6.33 Whilst there is healthy amount of creative and cultural activity across the LLDC, the offer is mainly focussed around Westfield and Hackney Wick & Fish Island. There is some activity in other areas, although these are not necessarily well linked to the more established areas of activity at Westfield Stratford City and Hackney Wick.

6.34 The East Village area has accommodated some interesting local food and drink businesses. But perhaps lacks the embedded identity, distinctiveness and edge of Hackney Wick and Fish Island. Growing populations and the ongoing evolution of the offer, will improve this over time, although encouraging more diverse uses (beyond Food and Beverage) may help,

whilst both the VeloPark and the Copper Box Arena could also do more to capitalise upon their offer beyond that of simple sports venues.

- 6.35 East Village can no doubt provide lessons for Hackney Wick and Fish Island as development comes forward. Maintaining diversity and flexibility in non-residential uses will be particularly important.
- 6.36 If the area's creative, cultural and leisure activities are not better joined up, the offer will continue to be disparate. This approach means that opportunities to collaborate, innovate, complement and brand the area are not maximised. A well-integrated and joined up approach to place marketing the area could also strengthen the LLDC areas brand. This could be achieved by testing a programme of new events and attractions that may help link the different locations across the LLDC together. This will help with curation of the LLDC offer and the opportunity to market the LLDC area as a unified brand.

Reflecting the cultural diversity of neighbouring areas and London as whole

- 6.37 The current cultural offer does not fully reflect the diversity and vibrancy of east London. The lack of diversity in programming is an omission which potentially influences the vibrancy of the LLDC area and also its relevance to the neighbouring populations. As the Business Survey carried out as part of this study shows, the business profile within the LLDC area does not reflect the diversity of the local area and wider East London. In particular, the number of majority female-owned businesses (7% within the LLDC area) is much lower than the estimated national average (c. 20%), the number of BME business owners is also low considering the ethnic diversity of this area of London.
- 6.38 The introduction of businesses and sector representative groups to engage in promoting employment and business establishment with local communities could help address this imbalance. Community engagement events and a dedicated events programme could help showcase opportunities for the local community and encourage further engagement. Making the QEOP and the wider LLDC area a place which celebrates local diversity, has the potential to open up new markets and bring more visitors to the area.

Creativity from developers

- 6.39 Consultations raised the issue of developers not doing enough to support creativity and a more coherent cultural offer.

- 6.40 More effective mediation with developers, to get a better deal for creative workspace, such as longer-term, larger-scale and more distinctive models and leases. Securing a stronger contribution through planning could help to develop a set of creative and cultural planning models which would be real test beds of international significance.
- 6.41 A Developer and Business Engagement Officer has been jointly commissioned by LLDC, LBH and LBTH in Hackney to liaise with developers and the local business community to ensure a more collaborative approach is taken in the future development of Hackney Wick and Fish Island.

7. Issues and Opportunities

- 7.1 The success and future growth of the Creative and Cultural sector in the LLDC area will in part, be dependent upon the area's ability to respond to the opportunities which come from the ongoing evolution and locations and new markets, whilst mitigating against the threats which come from future uncertainty and the pressures which can be associated with change.
- 7.2 Based on the research carried out as part of the Combined Economy Study, along with extensive consultation with local businesses, stakeholder organisations, and land owners; a number of opportunities and threats for the creative, cultural and leisure offer have been identified.

Future Opportunities

Holistic Cultural and Night-time Offer

- 7.3 Part of the strength of the LLDC offer are the hubs of activity which have developed in specific areas and the opportunity this creates in terms of a diverse visitor and leisure offer. Currently however, there is a lack of physical and psychological connection between these various offers.
- 7.4 The LLDC area could be viewed as one complementary mixed cultural offer which provides a continuum between lunchtime/afternoon and evening activities. The area should be more confidently promoted as a dynamic district, particularly into the evenings. This would facilitate the increase in footfall for sporting events and encourage a complementary programme of night-time activities which connect East Village, Stratford and Hackney Wick and Fish Island.
- 7.5 Opportunities exist to develop some shared programming and promotion activities between a mix of organisations and premises as part of the development process for institutions. This could help the area to become a cultural and creative hub which can rival the Southbank and West End.
- 7.6 In doing this, it is also important to acknowledge the role of wider community facilities within the night time economy, particularly where these support night time workers. The provision of non-A5 takeaway facilities will support this further, offering a healthier alternative than traditional takeaways.

Potential Local Creative and Cultural Supply Chain

- 7.7 Through the business survey, a number of food & drink businesses working across manufacturing, bespoke retail and street food and catering prep kitchen activities were identified. A number of these businesses service other East London locations and activities (e.g. street food markets, events, delis) but don't necessarily supply / link into local opportunities.
- 7.8 Opportunities for linking these businesses into new amenity, leisure and residential provisions in the area which would mean local businesses both supporting, and being supported by, the area's growing night-time economy. There are some early precedents of this (e.g. food businesses supplying the Hackney Boulder Project climbing space café, and Boulevard Catering supplying some of the Olympic sports venues) but given the prevalence of these businesses in the area it feels like there is a greater opportunity here.
- 7.9 These links could be developed through business engagement and networking events, along with the holding of local events e.g. a food and drinks festival.

Figure 7.1 Leisure and Creative Crossover Focus: Hackney Wick Boulder Project



Hackney Wick Boulder Project

Address: Wallis Road
 Business: Climbing space & café
 Workspace: Small industrial space
 Employees: 3

Established one year ago, the Hackney Wick Boulder Project is a new leisure and sports venue space in Hackney Wick. The business is open every day of the week, from early morning

until around 10pm and draws climbers and other visitors from across East London. The business was founded in 2017. The climbing space includes a small café space, which is supplied by a number of local food & drink manufacturers. The climbing space includes commissioned artworks from well-known local artists on the walls. The business is also a member of the Hackney Wick Community Interest Group.

The Hackney Wick Boulder Project shares its industrial unit with gallery and studio space provider Arbyte, who sub-let the space to the business. The business's staff all live locally and most cycle into work. The community feel and links to local artists is a key attraction of the area for the business's founders and staff.

The business has a desire to stay and grow in the area, but says it will be dependent on the scale and affordability of workspace in the area in order to do so. Over the next year the business anticipates that it will need more space, but reports some uncertainty around the future of affordable workspace in the area, reflecting on the scale of redevelopment and new residents moving into the area.

Source: WMT, LLDC Business Survey 2017

Developing the Music Offer

- 7.10 Consultations and a review of cultural assets suggested that currently there is a gap between the small-scale music offer provided in existing bars and venues in Stratford Centre and Hackney Wick & Fish Island; and the major events that take place in QEOP and the London Stadium.
- 7.11 Partners believe there is an opportunity for a new medium-sized music venue which has strong links to the community and provides a dynamic programme that could attract audiences from across London. This could be a 're-imagined' Rex on Stratford High Street, or could be achieved through more flexible uses of space at Lee Valley VeloPark or the Copper Box Arena.

Creative Enterprise Zone

- 7.12 Creative Enterprise Zones (CEZs) are a new Mayoral initiative to designate small areas of London where artists and creative businesses can put down roots and where creative activity is supported. Recognising the importance of Hackney Wick and Fish Island through this designation will help preserve and strengthen creative and cultural activity in the area.
- 7.13 CEZs are intended to assist start-ups, sole traders, micro-sized and small businesses that reflect London's ethnic diversity, offering stability and enabling growth. CEZs will put culture at the heart of local regeneration and involve collaboration with local communities and community-led cultural groups achieving increased skills, educational opportunities and job creation.
- 7.14 The potential designation of Hackney Wick and Fish Island as a CEZ will help support existing and low-cost sectors before the vulnerable critical mass of activities is lost to future development land pressure. The CEZ will encourage more people in the local community to become involved in the creative and cultural activity within the area and underpin future economic growth here.

Nascent Networks

- 7.15 The business survey and subsequent consultation has shown that there are some strong networks in the LLDC area. These are often focussed at a specific location (such as Stratford Workshops), focussed on a specific issue (such as Affordable Wick), or on a specific sub sector (such as East London Fashion Cluster). Currently, these networks are largely closed and are not necessarily benefiting from close working and collaboration with other entities.

- 7.16 This, and the presence of organisations who can support collaboration and network development (such as Plexal), provide an interesting opportunity to adopt the principles of Innovation Districts to develop stronger exchanges of ideas and information in the Creative and Cultural sectors.

The Cultural and Education District

- 7.17 The Culture and Education District is a major opportunity to enhance the existing creative activity and cultural production which is taking place in the LLDC area. This will bring new focus, institutions and reach to the area; offering significant potential benefits for existing local companies and groups.
- 7.18 It potentially provides the spark and fulcrum for a more coordinated approach to creative business support across the area. Whilst there is a risk of a segmented approach, such as; fashion (LCF), design and visual arts (V&A), and performing arts (Sadler's Wells), there is a major opportunity for cross-sector convergence, particularly with culture, tech and science.
- 7.19 This could enable the development of a new type of creative cluster underpinned by open, collaborative institutions working with a dynamic and flourishing ecosystem of micro enterprises and some aggregators. This mix of provision will be a key defining element for the area and give it a globally significant edge.

Inclusion

- 7.20 Despite the business survey showing that over 50% of employees within the creative sector live locally, consultation has highlighted a perception that the creative and cultural sectors working independent of the local community (with notable exceptions) is not conducive to inclusive growth. Specifically, consultees and workspace providers themselves identified a lack of ethnic diversity within workspace, studios and networks.
- 7.21 The potential for more oversight and influence in cultural programming could widen the extent to which the performance and cultural offer in the LLDC is representative of the neighbouring and wider east London population.

Hotels in hubs to strengthen the Cultural and Night-Time Offer

- 7.22 The demand for and supply of visitor accommodation in London⁴ produced by the GLA suggests that there is a need for around 1,800 new serviced visitor rooms per annum

⁴ Understanding the demand for and supply of visitor accommodation in London to 2036

between now and 2036. LLDC is well placed to help deliver some of this additional supply, particularly given that space within Central London is at a premium.

- 7.23 Locally, hotels could provide an opportunity to drive custom for a cultural offer and can act as an identifier and anchor for the area in which they are located. The existing proposals for hotel space in and around East Village and Pudding Mill could help create a more established night-time offer within these centres, increasing footfall and further animating these areas.
- 7.24 Further visitor accommodation located in the north of the QEOP could help support existing leisure and event venues such as the; Copper Box Arena, VeloPark and the Hockey & Tennis Centre. Visitor accommodation at Pudding Mill could stimulate demand for night-time and leisure activity along Stratford High Street.
- 7.25 In Hackney Wick and Bromley-by-Bow, future visitor accommodation should be seen as integral to the evolution of the cultural offer. It may, in these areas, be possible to add value to their creative and cultural identity by supporting a less conventional offer than is currently available within the LLDC area.

Potential Issues

Fragility and Loss

- 7.26 There is a perception that Hackney Wick and Fish Island as a creative destination is becoming increasingly fragile. Recent thinking and anecdotal evidence suggests that the LLDC has seen the loss of more artists' studios in the last three years than have been re-provided or matched by new openings. While studio providers like V22 and Mother X are successfully operating recently-opened artists' workspaces, the loss of a number of artists' studios, around the White Post Lane and Wallis Road areas in Hackney Wick in particular, have impacted on the area's identity as a hub for artists. A quarter of the business surveyed stated they expect to move from their current premises in the next year. A further, 10% of businesses reported uncertainty, as to whether they will remain in their current premises over the next year.
- 7.27 The area has strong ties to the inner east and places such as Dalston and central Hackney and there is a concern that any loss in the Hackney Wick area, could also impact upon the wider areas. Consultation has demonstrated there is a fear of gentrification from the businesses and residents located in this area; due to uncertainty around leasing

arrangements being granted for creative and cultural organisations, and the increasing cost of workspace.

Competition

- 7.28 The area is increasingly operating in a competitive market for culture and creativity, with more and more of London's locations attracting operators and investment. These sectors now sit at the heart of many boroughs' economic strategy.
- 7.29 In addition to new creative strategies and CEZ projects in other places, large new artists' workspace sites are currently in the pipeline in Greenwich, Silvertown, Deptford and Southwark stand to challenge the LLDC area's reputation as a place for artistic creation. Even existing providers in the LLDC area (SPACE, Cell, Arebeit, V22, ACME) are now some of most well-established across London and all of them manage multiple workspace sites across East London.

Partnership and Leadership

- 7.30 A common theme that arose in consultations was leadership and ownership of the future strategy of the area. There is also concern that smaller organisations and businesses could be supported more to participate and add value to strategic discussions.
- 7.31 There is an opportunity to develop a coherent and inclusive approach to explore investment opportunities for creative workspace, events and place-branding. The area could be a pioneer for partnership working; embracing innovation in design, in encouraging incoming cultural organisations to develop new types of open, interactive and participatory spaces & programming, as well as facilitating connections between sectors (e.g. technology and culture) and uses (e.g. cultural production and consumption).
- 7.32 To achieve this, champions and strategic leaders need to be identified and supported to oversee the evolution of the creative and cultural sector.

Innovation

- 7.33 Hackney Wick and Fish Island has in the last two decades, been a pioneer for the 'do-it-yourself', independent cultural scene, that has incorporated environmental sustainability and a blend of sub-cultures.
- 7.34 However, anecdotal evidence suggests there are questions around whether the area has matured beyond this, and if it has been converted into a set of new activities which resonate

with the wider LLDC area. Consultations have suggested that a lack of innovation in areas such as design best practice and community engagement as possible reasons for this.

- 7.35 There is the potential for new types of cultural partnership and infrastructure to be developed and embraced so that the changes here can deliver positive change for the wider area. The cultural sector and wider community have an opportunity to be more proactive in converging creative, tech and environmental businesses, encouraging a more innovative, grass-roots approach.

Indeterminacy

- 7.36 As this research has shown, there are is a diverse range of creative and cultural assets across the LLDC area. However, it has also highlighted there needs to be greater clarity on the overall creative and cultural proposition within the LLDC area. With the major development of the CED in the coming years, it is imperative that the plans are made clear. Ensuring the status of individual projects, along with how they connect within and across the LLDC area and beyond are communicated to the LLDC community. A clear narrative for the CED would assist in exciting existing businesses as well as inviting and attracting new cultural organisations to the area.

Potential stagnation of development

- 7.37 The LLDC area has seen rapid change in its resident population, with the local population increasing by more than 160% since 2010.
- 7.38 Whilst the growing residential population means an increased customer base for local businesses, the Retail and Town Centre Needs Assessment raised concerns relating to the potential stagnation of future development. If the amount of residential development brought forward stagnates, the customer base required to maintain their business will not materialise. This could impact on all sectors, particularly the more locally-focused cultural and leisure businesses in the smaller local centres (outside of the Westfield) which depend on the demand and spend generated by local residents.
- 7.39 Any form of stagnation in any of the large commercial developments across the LLDC area will also limit the critical mass needed to stimulate further economic growth across all sectors within the LLDC area.

Fragmentation in the Night-Time Economy

- 7.40 The recent household study suggests that the local area has strong leisure and night-time retention (70% of residents choose to stay local). This demonstrates that the night-time economy offer is more mature and diverse than the common perception. However, the night-time and leisure activity are fragmented. It would appear there is a lack of a collective scene which invites a curated overall offer. Consultation has also suggested a disconnect between the family and business-facing leisure offer at Westfield compared with the younger leisure offer of Hackney Wick and Fish Island.
- 7.41 The new museum offers and fashion cluster in the Culture and Education District can play a powerful role in placemaking the night-time and leisure offer. These institutions should engage with the changing area and connect with surrounding communities. The night-time use in new developments could also be positioned and marketed as a 'fringe' to the mainstream offer at Westfield and Stratford Town Centre.

8. Recommendations & Policy Implications

- 8.1 There is already some strong provision and peer to peer activity supporting the creative economy in the LLDC area. Now is an important time for the area, where the growth trajectory, new diverse spaces and critical mass of 'historic' activities mean that there is currently a sweet spot between bottom up growth and top down investment. This has also created a delicate balance, where decisions made now will have a fundamental impact upon on the creative economy for years to come.
- 8.2 The culture and night time economy, at times emanating from the area's creative base will play a fundamental role in placemaking; supporting the attractiveness and distinctiveness of new and existing areas to business and residents.
- 8.3 The Development Corporation is uniquely positioned to work directly with partners and the business community to provide strategic oversight over interventions to support the sector. A number of areas where they could intervene to support this are set out below.

Curate: Develop Collective Identity and Vision

- 8.4 The significant growth that has occurred in the LLDC area over the last few years, is set to continue with the development of the CED and regeneration of a number of strategic sites across the LLDC area.
- 8.5 Whilst the proposed development presents exciting new opportunities for the QEOP and LLDC area as a whole, the sub-areas need to be able to both preserve their unique identities, whilst aligning with the broader identity of the LLDC area (see Table 8.2 below).
- 8.6 Consultation has indicated that there is disconnect between the sub-areas which can create difficulties in conveying a universal identity for the area's creative economy. This in itself is not a problem, although it is important that the impact of the wide spectrum of spaces is not lost as the area evolves.
- 8.7 **LLDC should seek to work with partners to develop a shared vision for the area which reflects the diversity of activity in and around the park and reflects the diversity and breadth of the offer.**
- 8.8 The shared vision will also help shape the brand identity for the LLDC area and its subareas. The brand identity will need to be cohesive reflecting the whole area whilst demonstrating the unique identity of each sub-area.

Cultural Vision and Curation

- 8.9 The LLDC area is already becoming an important space for the creation and presentation of cultural content. Currently, this activity can be quite disparate in its presentation and is not delivering the scale of benefit that it could. **An individual or entity providing some curation of the cultural programme in the LLDC area could not only help deliver a more diverse offer, but better connect local companies and organisations to new audiences and markets.**

This could be done on an annual basis with a rolling auteur or curator providing new direction and content each year. With Waltham Forest becoming London's first Borough of Culture in 2019, there is clearly an opportunity, particularly in the North Stratford and Eton Manor sub-area.

Coordinate: Enable Deeper Collaborative Working

- 8.10 The business survey along with the desk-based research, has shown that the LLDC area, has a large number of micro, SMEs and Start-ups operating within it. This is vital to the area's diversity and sustainability. However, larger companies and institutions (e.g. BT Sport, Ford Mobility, UAL, Loughborough University) are now beginning to establish themselves in the area.
- 8.11 Recent research⁵ has found large businesses spent more on collaboration than R&D in 2016/17, which shows the value placed in SMEs by Large Businesses. Collaboration with SMEs is becoming a tool for delivering corporate innovation, due to the reach and scale of the larger business and the specialist knowledge and flexibility of SMEs.

Becoming a Hub for Innovation

- 8.12 Innovation is one of five foundations of productivity stated in the recent HM Government Industrial Strategy⁶. Within the Draft Economic Development Strategy (2017), the Mayor of London has also identified London's educational institutions as the drivers of innovation and scientific advancement.
- 8.13 With the location of UAL, UCL and LCF, to the Olympic Park, the area will be rich in educational assets to help inspire innovation. In addition, the proximity of HereEast which brings business, tech, media, education and industrial innovation together on one site

⁵ Bond Dickinson, 2017; Close Encounters: The Power of Collaborative Innovation

⁶ HM Government Industrial Strategy: Building a Britain fit for the future, 2017

should complement the educational offer and further encourage innovation across the LLDC area. Plexal at HereEast has the expertise and skills to support this innovation practically and should be supported to play a fuller role in coordination of the LLDC area as an innovation district.

Protect: Maintain and Develop a Full Spectrum of Creative and Cultural (and supporting) Spaces

- 8.14 The quantum of future development proposed in the LLDC is significant. Therefore, developers and policy makers will have an influential role in the future sustainability and diversity of the creative sector in the area. Currently, the area is actually well served in terms of the range of creative and cultural spaces it hosts; this however, is increasingly challenged as the area changes and commercial pressures threaten certain spaces.
- 8.15 **Therefore, it is important for developers and LLDC to be innovative during both planning and delivery to embrace new ways of working.** This could include activities to:
- **Continue to support affordable rents through planning (LLDC Local Plan 2015); Policy B.4** - Providing low-cost and managed workspace, whilst potentially engaging with the Mayor's emerging Creative Land Trust proposals to safeguarded space for creative employment and experimentation. Discussion with neighbouring boroughs in relation to potential business rate relief for creative businesses could also support and protect the creative sector.
 - **Industrial Intensification** – Seek to pilot new approaches to intensification to support the retention of varied industrial activity in the LLDC area or within close proximity.
 - **Maintain a diverse range of workspace types** – consultation with property agents suggest that commercial spaces currently occupying industrial land needs to be modernised to suit the needs of businesses. However, the more traditional type of workspace on offer remains an important part of the offer. Where possible this should be re-provided, or alternative spaces should be identified in the area.
 - **Support exemplar development at The Yard** - The planned development for Hackney Wick Central, will involve the redevelopment of The Yard. The redevelopment of this site could provide the opportunity for LLDC to establish an exemplar cross-art hub providing a creative commercial workspace, with theatre space, community space and night time amenities including a bar and restaurant.

- **Support Hotel Development in Hubs** - Support the development of further hotel development at hubs which are under provided for or are not planned for at all. In doing this, seeks to provide greater diversity within the hotel accommodation offer, potentially supporting the development of more boutique provision, hostels and potentially a working hotel school to support local people to access higher value careers in the leisure sector.
- **Support Leisure Development on Edge of Town Locations** – Aspiration (within the Part C: Retail Needs Assessment) for Stratford to be designated as an International centre, will require growth in the offer and support for activities in edge of town locations. (In line with the recommendations of the Mayor’s Cultural and Night Time SPG) LLDC should work with landowners to enable the transformation Stratford High Street (particularly the northern end) to support mixed use development incorporating cultural and night time uses which support diversification within the local offer. In the short term, enabling interim cultural activity within the existing underutilised spaces on the High Street could help reanimate the road and test new ideas.

Internationalise: Reflect London’s Position as a Global City within the LLDC area

- 8.16 Following the results of the Brexit Referendum, the Mayor of London launched the #LondonIsOpen campaign to demonstrate that London is open for business and the city remains entrepreneurial, international and full of creativity.
- 8.17 **The LLDC area can play an important role in the ‘London Is Open’ narrative and should strive to better reflect the ethnic and cultural diversity of the wider area and become an internationally recognised centre for creativity and culture.** There are a number of initiatives and interventions that could help showcase the LLDC creative offer, such as:
- **Cultural Partnerships/Networks** – there are currently over 80 European creative and cultural networks which span a range of creative and cultural sectors. Joining a creative and cultural network will help showcase the creative specialisms in the LLDC area. The networks could also assist in identifying partner cities, in which other creative hubs are established or emerging that could present further collaboration opportunities.
 - **Creative Europe Programme** - the European Union's programme to support the cultural, creative and audio-visual sectors. From 2014-2020, €1.46 billion is available

to support European projects with the potential to travel, reach new audiences and encourage skill sharing and development. The programme helps fund the development of co-operation projects, festivals and networking opportunities. Despite the UK's imminent departure from the EU, funding is anticipated to be available until at least 2020.

- **Festivals Programme** – the development of festivals is key to gaining international recognition and exposure. The LLDC area has adequate infrastructure (transport, accommodation, amenities) to support major festivals already in place and should capitalise on this. The launch of a festivals programme would help raise awareness and showcase the area's creative and cultural offer, alongside its well-established leisure offer. This would help augment the creative offer further and establish the area as a globally-renowned destination for creative and cultural activity.
- **'International' Designations** – Partners should lobby for Stratford to be recognised as an international or future international centre in policy (specifically London Plan town centre hierarchy and Mayor's Culture and Night Time SPG)

8.18 The place branding of the LLDC area will also need to be considered alongside any awareness raising to ensure the unique creative offer is marketed cohesively and consistently.

Innovate: Nurturing of the creative and cultural ecosystem

8.19 **Nurture the cultural ecosystem of Hackney Wick and Fish Island so it operates as an R&D hub and fine grain creative ecosystem, complementing and servicing the larger scale institutional and commercial creative and digital economy of the wider LLDC area.** This will enable anchor organisations to exist there; securing long-term leases for cultural hubs – e.g. established artist studio provider(s) to ensure there is a long-term flow of professional artists and makers working through the area.

Coordinate: Night-Time Commission

8.20 Through consultation with the London Night Czar, it has been suggested an LLDC night-time economy round table with stakeholders could be set up to further develop recommendations for the future of the night-time offer.

8.21 This would provide a key public moment to facilitate discussions with key players across the LLDC and position the area as a major hub for London's changing night-time economy. This would also provide a platform for exploring how the LLDC can shape a genuinely

innovative approach to the night-time economy: trailblazing new approaches to the curation and management of activities and inviting new types of activity which enhance London's overall offer.

- 8.22 **This should seek to respond to, and be an exemplar for, the diversification of evening and night-time activities as set out in the Mayor of London's Culture and Night Time Economy SPG.** In particular, this may seek to encourage a more diverse use of existing and future non-residential uses alongside improved curation and planning of the cultural and night time offers. This may include shared spaces (as recommended in NPPF, para 70) building upon the forthcoming delivery of Clarnico Wharf.
- 8.23 Partners should also seek to work with the Night Tsar to lobby for great regional recognition of Stratford and Hackney Wick as Night time economy clusters in policy. The Culture and Night Time SPG currently does not recognise Hackney Wick at all, whilst Stratford is classified in the fourth tier (NT3: More than Local Importance).

Implications for Policy

- 8.24 The policy base to achieve the recommendations set out above is already comparatively strong.
- 8.25 This report provides an opportunity to reacquaint partners with existing guidance on affordable workspace and on typologies and fit out (LLDC Employment Space Study, 2015) as well as encourage them to think more innovatively about their approach to non-residential uses.
- 8.26 More generally, a change in focus from development to coordination and from enabling to embedding activity. In doing this, there are five specific areas which could have specific implications for LLDC policy.

Creative Enterprise Zone

- 8.27 The implementation of a Creative Enterprise Zone could play a critical role within the new Local Plan with full proposals on how to develop, enhance, protect and manage new and existing creative workspace. This could go as far as offering working with LB Tower Hamlets and Hackney to offer business rate incentives to support companies to locate and stay in the area and should certainly include the retention and promotion of policy linked to the provision of lower-cost managed workspace.

- 8.28 This will help preserve the unique character and identity of the area and should assist in carefully managing the large-scale development planned for Hackney Wick Central.

Night-Time Strategy

- 8.29 A clear and specific strategy linked to the night-time and cultural economy should be reflected in the new Local Plan. The strategy should champion diversity and innovation in the night-time economy. Strengthening and harmonising the broad range of activity that is taking place in the LLDC area, making it (and Stratford and Hackney Wick in particular) more attractive destinations.
- 8.30 Consultation has also suggested that licencing processes and regulations can be unclear for businesses. This is due to the distinction between planning consent operating hours (LLDC controlled) and licensing hours (controlled by neighbouring boroughs). However, a more coordinated approach and better communication during the licensing process could better support the night-time economy.
- 8.31 The creation of a forum consisting of; local authority officers, business owners, residents and community groups could input into the strategy. The forum and resulting strategy would also address specific local issues such as; placemaking, wayfinding and safety; which were identified as challenges, in the business survey and Retail & Leisure Needs Assessment.
- 8.32 In due course, this forum could evolve to support the development an SPD for the night-time economy in the LLDC area. This could provide greater consistency on licencing, wayfinding and lighting as well as providing a collective response to the challenges provided by Crime and anti-social behaviour.

Accommodating Diversity in Mixed Use

- 8.33 The ability of LLDC and its partners to support future growth in Creative, Cultural and night time businesses will be largely dependent upon their ability to accommodate activities in mixed use development. This will, in some cases, mean challenging developers to provide spaces in the ground and lower floors of development which may not be 'typical'.
- 8.34 The 2015 Economy Study provided guidance on the typology of spaces which should be considered to accommodate these types of activity. This guidance remains relevant for the purpose of this study and is reprovided for reference below.

Table 8.1 Opportunities for Mixed Use Development

Activity	Typical workspace	Typical spatial characteristics	Considerations for mixing at building level
Creative	Workshop / studio spaces	<ul style="list-style-type: none"> • Lower ceiling (2.9-4-4m), but with higher preferred minimum (3.5m) • Provision possible on any floor • Require occasional servicing / deliveries related to production materials, which may be of a large scale 	<ul style="list-style-type: none"> • Generally minimally disruptive, low-noise level neighbours • Individual studio space units, compatible with residential uses in the same building if access requirements and environmental impacts are addressed appropriately. • Studio spaces can be provided at any level provided increased space requirements for the movement of materials is provided for.
	Small industrial	<ul style="list-style-type: none"> • <500m² (5,382sq. ft) • Higher ceiling (4.5 - 8m) • 4m loading bay • Ground-floor provision preferable • Purpose-built shed/ unit 	<ul style="list-style-type: none"> • Individual small industrial units, less compatible with residential uses in the same building given accessing and servicing needs as well as potential environmental impacts. • Industrial uses will typically be provided on the ground floor. • Mix can be less problematic if small industrial uses are not noxious, quieter and don't require regular servicing.
Food & drink	Retail-type spaces	<ul style="list-style-type: none"> • Ground-floor provision necessary ideally with street or shared space frontage to capture footfall • Require occasional servicing / deliveries • Typically <500m² (5,382sq. ft) • Higher ceiling (+4m) preferable 	<ul style="list-style-type: none"> • Enhanced noise mitigation measures, consistent with Small Industrial Unit mix with residential at a Building Level (LLDC Employment Space Study, pages 100-101), will make such units more flexible for food & drink uses.
Night-time	Small industrial	<ul style="list-style-type: none"> • <500m² (5,382sq. ft) • Higher ceiling (4.5 - 8m) • 4m loading bay 	<ul style="list-style-type: none"> • Individual small industrial units, less compatible with residential uses in the same building given

		<ul style="list-style-type: none"> • Ground-floor provision preferable • Purpose-built shed / unit 	<p>accessing and servicing needs as well as potential environmental impacts.</p> <ul style="list-style-type: none"> • Industrial uses will typically be provided on the ground floor. • Mix can be less problematic if small industrial uses are not noxious, quieter and don't require regular servicing.
	Retail-type spaces	<ul style="list-style-type: none"> • Ground-floor provision necessary ideally with street or shared space frontage to capture footfall • Require occasional servicing / deliveries • Typically <500m² (5,382sq. ft) • Higher ceiling (+4m) preferable 	<ul style="list-style-type: none"> • Enhanced noise mitigation measures, consistent with Small Industrial Unit mix with residential at a Building Level (LLDC Employment Space Study, pages 100-101), will make such units more flexible for food & drink uses.
Leisure	Assembly spaces	<ul style="list-style-type: none"> • Bespoke typology, no typical size guidance 	<ul style="list-style-type: none"> • Further enhanced noise mitigation measures. • Food & drink uses (as these are typically also present with assembly spaces) require own noise mitigation measures. • Scale of assembly space also brings crowds. Transport and mitigation strategy needs to be considered to avoid disruptive impact at times of entry and egress. • Anticipate that project-specific acoustic, transport and environmental impact reports would be required.

Source: LLDC Workspace Study, 2015

Intensification Guidance

8.35 With the protection of existing industrial land and the development of new housing both being strategic priorities for the GLA and London Boroughs, the pressure on existing developable land is higher than it has ever been. Satisfying both interests will involve

innovative and creative solutions and masterplanning. The intensification of industrial land by ensuring complementary mixed uses are factored into development. Guidance (such as the GLA Industrial Intensification Primer (2017)) and support for developers and masterplanners should be made available to ensure only innovative plans are submitted. The LLDC could be the exemplar planning authority to champion this type of development.

Innovation Strategy/District

- 8.36 Adoption of an innovation strategy for visioning and securing cultural infrastructure-working with developers, local communities and businesses to position the LLDC area as a place that champions best practice in design, openness, and the convergence of different types of use. This includes the concept of world-class cultural and educational infrastructure as a civic and community asset. It also includes a commitment to culture in placemaking (e.g. in terms of the signing and branding of the LLDC area), the coordination of the offer into a coherent landscape of cultural provision; and the encouragement of ‘third spaces’ which connect different uses and users (e.g. in the public realm, via events and festivals).

Future Sub-Area Functions

- 8.37 There is already a healthy Creative, Cultural and Leisure offer within the LLDC area however, as the evidence has suggested, this offer is disparate and needs to be curated more effectively to help establish the LLDC area as an internationally renowned creative, cultural and leisure destination.
- 8.38 The Local Plan review offers an opportunity to consider the future of each area and communicate new or renewed aspirations to developers and land owners. Based on the research presented here and in other elements of the Combine Economy Study we have identified creative, cultural and night-time functions for each of the sub-areas and the role they will play in the future.

Table 8.2 Future Roles of LLDC Subareas

Sub-Area	Role
Subarea 1: Hackney Wick and Fish Island	<p>Creative:</p> <ul style="list-style-type: none"> Will act as the hub of the area’s proposed Creative Enterprise Zone continuing to provide a broad spectrum of creative and artistic workspace to help protect the area’s strong creative identity. Further establishing its role as one London’s major centres for creativity.

	<ul style="list-style-type: none"> • Support new activity emerging from educational and creative institutions within the CED such as LCF and UAL; through collaboration and innovation with local businesses. • Hackney Wick will be a pioneering development; re-providing affordable and flexible workspace to protect the existing SMEs and micro businesses that are unique to the area. Whilst introducing a new mix of space to help grow and mature the creative sector. <p>Culture:</p> <ul style="list-style-type: none"> • Local centre functions will be protected as new residential development at Hackney Central comes forward, creating demand from new residents. This will generate demand for a more diverse range of leisure, retail and night-time economy amenity in the area • The crossover between creative and cultural activity should continue to be a feature of the Hackney Wick and Fish Island offer, with spaces remaining flexible to the changing needs of the dynamic sectors • The evolution of the Yard and attraction of new cultural operators will provide an offer distinctive from the more mainstream offer of Westfield and QEOP. This 'fringe' activity should however link to the CED and Westfield where possible <p>Night-time:</p> <ul style="list-style-type: none"> • Hackney Wick and Fish Island already has a distinctive night time offer which contributes to the areas identity. Careful management will be required to maintain this as the population of the area grows. • Provision of a hotel will help to embed the night time offer. Independent cinema, could also help to provide a diversification away from an offer focussed solely on bars and restaurants.
<p>Subarea 2: North Stratford & Eton Manor</p>	<ul style="list-style-type: none"> • Further development of East Village, will support further growth of the local population and demand for local amenities. • This will turn what is currently an emerging local centre to a well-established centre, with a well-developed and distinct night-time offer alongside existing local centre functions. <p>Culture:</p> <ul style="list-style-type: none"> • Whilst there is limited space for permanent cultural activity, spaces on QEOP could provide opportunities for impromptu cultural activity as part of a wider cultural strategy.

	<ul style="list-style-type: none"> • The VeloPark and Hockey and Tennis Centre (and Copper Box Arena) could accommodate a broader range of cultural activities (Music, theatre and cinema) in the future. Where possible, this should seek to cater for a broad family market, <p>Night-time:</p> <ul style="list-style-type: none"> • The growth in leisure and night-time amenity (e.g. hotels, bars and restaurants) will help the area become recognised as a destination. • East Village should seek to retain its diverse independent restaurant and bars. Improved way finding from other parts of the park and LLDC area will help to integrate and drive footfall.
<p>Subarea 3: Central Stratford and Southern Queen Elizabeth Olympic Park</p>	<p>Creative:</p> <ul style="list-style-type: none"> • The area (and Westfield in particular) will continue to be the nucleus for all commercial activity within the LLDC area with the potential to grow into an International Centre for East London • Major development such as the CED and IQL will be significant economic drivers for the LLDC area and will support the location of larger creative and digital operators • The major development in the pipeline will further increase the LLDC area's supply of Grade A office space, establishing the areas role as a strategic office location and a future CAZ satellite. <p>Culture:</p> <ul style="list-style-type: none"> • The critical mass generated by the IQL and CED will introduce a new market to the area whilst attracting visitors from further afield, from a wider range of age groups and with a broader set of interests. • The CED will be a driver for cultural production and consumption in London, not only increasing visitors, but also providing opportunities for fringe activities around the park. • Culture should be a fundamental part of the expansion and diversification of the Stratford offer, with potential for the northern • end of Stratford High Street to play a greater role and form an identity of its own. <p>Night-time:</p> <ul style="list-style-type: none"> • The area will remain an important evening location, broadening the night time economy offer, with visitors drawn to the offer at Westfield Stratford City.

	<ul style="list-style-type: none"> • Stratford town centre and High Street should evolve to offer a more diverse offer which reflects the cultural diversity of neighbouring populations. The aspiration should also be to provide more family orientated offer in the area.
<p>Subarea 4: Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Meads</p>	<p>Creative:</p> <ul style="list-style-type: none"> • Developments such as Strand East and the redevelopment of Pudding Mill will attract a new resident population and workforce to the area which will help support local centres. • New flexible workspace provided as part of the planned developments, will help support and complement the growth at other locations, further strengthening creative clustering at Hackney Wick and potentially offering space to companies moving away from HWFI. • Affordable workspace will also help support creative start-ups and SMEs, which is currently limited in the area, helping protect the areas creative and artistic heritage. • New development will also provide employment space, which can support activity within the CED, close links between local businesses and institutions within the CED will be very important to the growth of the creative sector. <p>Culture:</p> <ul style="list-style-type: none"> • The Cultural offer at Bromley by Bow and Pudding Mill Lane needs to balance its contribution to the LLDC are and relevance to local populations and reflect the diversity of content produced at Three Mills Studios • As a district centre, Bromley by Bow should seek to address the deficit in cinema provision outlined within Part C: Retail Needs Assessment, potentially through an independent cinema or culturally focussed offer. <p>Night-time:</p> <ul style="list-style-type: none"> • The local centres will improve the retail, leisure and night-time economy offer in areas, where there has been very little activity in the past. • Development needs to be sensitive to any remaining 24 hour commercial uses on the various sites, this includes the Three Mills Studios. • Night time anchors will be important in creating distinct identities at Bromley by Bow and Pudding Mill Lane. Bromley by Bow in particular should seek to accommodate night time

entertainment uses, again focussing on a broad market, including families.

Specific Planning Policy

- 8.39 There are a number of LLDC Local Plan policies which have specific resonance to supporting future growth in Creative, Cultural, Leisure and Night-Time Economies. These are considered below, along with any amendments which could be considered to support the sector in the future.

High Level Policy Aspirations

- 8.40 Strategic policies relevant to this report are set out below. These underpin the aspiration for the local economy and set the tone for the placemaking which will support sector growth.

Table 8.3 Relevant Existing Local Plan Policies

Policy	Description	Action
Policy SP1	Building a strong and diverse economy	Retain - with the future development of CED and IQL and the completion of HereEast, this policy should still be relevant in the local plan review. Indeed, it is important that a diverse range of spaces and businesses are supported in the area. To ensure this can happen, improved monitoring of the evolution of the economy will help ensure that this objective is tracked, and that the area continues to perform well in relation to its competitors.
Policy B1	Location and Maintenance of Employment Uses	Amend – this is an important strategic policy and should be retained within the new Local Plan. However, clearer guidelines on the release of land located at LSISs should be included. This includes a requirement to at least maintain levels of employment as well as protecting and accommodating employment in strategically-important sectors (including creative and cultural). Where possible, developers should be encouraged to re-provide space to better meet the specific needs of creative and cultural occupiers (as set out in the recommendations here), noting the need for flexibility and the typologies of uses originally set out within the 215 Economy Study. Developers should

		also be challenged to seek innovative responses in terms of intensification and reconfiguration of space.
Policy B3	Creating vitality through interim uses	<p>Retain – the interim use of vacant premises has led to proposals such as Clarnico Quay coming forward. Interim uses help activate areas where there were no existing uses or help sustain existing activity; they also help new uses to be piloted, allowing the area to respond to changing trends and fashions. Current policy stipulates temporary uses will be supported where:</p> <ul style="list-style-type: none"> • Land has been set aside for development in the longer-term and the proposed interim uses will reinforce the long-term leisure, cultural or event-based uses; • Vacant premises will be used for small-scale retail, community, sporting and leisure, community uses, or cultural and creative industries; or • Managed or affordable workspace is proposed prior to delivery of long-term phased development with planning permission. <p>These are all relevant to strengthening the existing creative, cultural and leisure economy within the area.</p>
Policy B4	Providing Low-Cost and Managed Workspace	<p>Retain and Amend – rents are increasing in the area due to demand increasing and supply elsewhere becoming limited. Specifically, creative and cultural businesses are in some cases, struggling to adapt to area change, particularly where their existing premises are being redeveloped. To ensure the heritage, character and diversity of the business base, further provision of flexible, lower cost workspace is recommended. The policy as written is sound, but LLDC should ensure that it is amended in a way that requires developers to respond to the three requirements set out in policy E2 in the Draft London Plan. Distinction should be made between low cost office and specific space for artists and creative production. In line with London Plan E2 – <i>“Larger-scale commercial development proposals should consider the scope to incorporate a range of sizes of business units, including for SMEs”</i>.</p>
Policy B5	Increasing local access to jobs, skills	<p>Retain – the LLDC area has seen improvements in skills and educational levels over the last five years, it is important that this trend continues, and the local population are equipped</p>

	and employment training	to fill the growing number of opportunities becoming available in the area. This is particularly important as the CED is delivered and HereEast is delivered to its full extent. In doing this, it is also important to note the importance of working with schools and local community groups to engage longer term residents in the opportunity.
Policy B6	Higher education, research and development	Retain – the role of higher education, research and development is important to the LLDC area and specifically to the creative sector, therefore it is relevant for this policy to be retained.

Source: LLDC Local Plan

Area-Specific Priorities

8.41 The current LLDC Local Plan outlines a set of priorities for each area based on the vision for each place. A summary of these policies and their relevance is outlined below.

Subarea	Area Priorities	Comments
Subarea 1: Hackney Wick and Fish Island	<ul style="list-style-type: none"> Heritage-led regeneration and high-quality design: Ensuring that proposals for development are designed to respond to heritage assets, and where possible, restore and reuse those assets in a way that reinforces and celebrates their historic significance. Creative and productive employment: Protecting creative and cultural industrial uses that support the continuation of Hackney Wick and Fish Island’s entrepreneurial and enterprising work culture. Mix of uses accommodating a range of employment uses and a significant increase in residential floorspace and community facilities. Neighbourhood Centre: Establishing a new Neighbourhood Centre to provide a focus for retail, community, leisure and service uses, and improving the amenities of the 	<p>The future protection of the Hackney Wick’s creative heritage is important, especially if it is designated as one of London’s first Creative Enterprise Zones.</p> <p>Enable the retention and re-provision of the current night time economy specialism of the area.</p> <p>Retaining and supporting organisations (such as Stour Space and Yard Theatre) which support the development of creative networks and inclusion is also important. This will help the area to constantly reinvent its creative identity and the cultural content developed there.</p> <p>The careful planning of the Hackney Wick Central development is also key in ensuring the area’s heritage</p>

	<p>area to support both existing and new residential communities.</p>	<p>and identity is retained whilst introducing a new resident community and strengthening the existing culture and night time amenity offer.</p>
<p>Subarea 2: North Stratford & Eton Manor</p>	<ul style="list-style-type: none"> • Continued delivery of the approved housing type, size and tenure mix to ensure a balanced range of homes and a focus on family housing. • Continued delivery of high development quality and sustainability standards. • Achieving quality public spaces and public realm. • Allowing for development of existing and future routes between this area and areas to the east and north. • Ensuring that the Local Centre develops a local function, distinct to the Metropolitan Town Centre at Stratford. 	<p>Strengthening the local centre will help establish the area's role within the LLDC area, giving it capacity to grow and diversify its cultural offer with a new population.</p> <p>Related to this, linking these new markets to other cultural centres is also important. Improved links to central Stratford and Hackney Wick will also complement the existing leisure and night-time activity in these locations.</p> <p>As well as improving open spaces, it is also important to curate the cultural offer that is delivered in these spaces.</p>
<p>Subarea 3: Central Stratford and Southern Queen Elizabeth Olympic Park</p>	<ul style="list-style-type: none"> • Supporting the Metropolitan Centre and driving change and investment through identifying opportunities for business, cultural, visitor attractions and educational facilities. • Securing and facilitating regeneration for the existing communities, to ensure benefit from the 2012 Games flows into the local communities. • Delivery of new housing development which is appropriate in type, size and tenure mix. • Enhancing pedestrian and cycling connections across the area, including enhancing the role of waterways and Blue-Ribbon Network. • Continued delivery of high-quality development, achieving sustainability standards. 	<p>With the development of IQL and CED, there will be an opportunity to secure one of London's most important cultural nodes, with supporting creative activity in the form of new and local business. If Stratford is to become an International Centre, it is important that near centre locations leverage value from this new creative and cultural development. Supporting 'Fringe' cultural and night-time activities on Stratford High Street will help the centre grow and diversify.</p> <p>Development of strong networks and community engagement will be crucial in ensuring that residents and businesses benefit from new</p>

	<ul style="list-style-type: none"> • Achieving quality public spaces and public realm. • Ensuring excellent on-going provision of community facilities, including schools, medical services, community meeting spaces and open space. 	<p>opportunities arising from the CED. Ensuring that 'open' physical spaces exist to support this will be a key element of this ensuring that these benefits are realised.</p>
<p>Subarea 4: Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Meads</p>	<ul style="list-style-type: none"> • A potential new District Centre at Bromley-by-Bow. • Better connectivity, especially for walking and cycling across the area. • To take advantage of the character and history of the waterways to bring forward new development. • To provide new housing and jobs, with a mix of uses across the area. • To preserve and enhance the heritage assets in the sub-area. 	<p>There is potential for significant change within this area. The preservation of heritage assets such as Three Mills is important to protecting and growing the area's reputation for internationally significant creative activity. Bromley By Bow could benefit from proximity to significant film and tv production with a new anchor cultural/night time attraction linked to this unique neighbour.</p> <p>Whilst the existing priorities for the area remain relevant, emphasis should also elude to supporting employment activity in Hackney Wick and the future CED. The provision of flexible and creative workspace could help extend and strengthen the creative activity present in other locations across the LLDC area.</p>

Specific Sub-Area Policy

8.42 Within the existing Local Plan, there are a number of specific planning policies relevant to each of the sub-areas. These have been detailed below, as part of this process, recommendations have been provided as to whether the policy remains relevant. Detailed information relating to each of the subarea policies can be found in Appendix D.

Table 8.5 Relevant Existing Local Plan Policies

Subarea	Policy	Recommendation
Subarea 1: Hackney Wick and Fish Island	Policy 1.1: Managing change in Hackney Wick and Fish Island	Retain – preserving the areas creative heritage is very important in the future development of Hackney Wick. Providing and re-providing workspace is key to managing future change in the area without stifling growth. Refamiliarising developers with existing guidance on mixed use, and Agents of Change will be crucial to achieving this.
	Policy 1.2: Promoting Hackney Wick and Fish Island’s unique identity and appearance	Retain – similar to above, the area has a distinctive creative identity which has to be preserved. Promoting and enhancing the area’s unique identity will help support further creative growth in the area whilst supporting the vision to become a CEZ.
	Policy 1.3: Connecting Hackney Wick and Fish Island	Retain/Amend – existing policy suggests improving links between locations within the HWFI area, which remains highly relevant. However, links to other locations within the LLDC area such as; HereEast and East Village to the East and Puddling Mill and Bromley-by-Bow to the South should also be priority.
	Policy 1.4: Preserving or enhancing heritage assets in Hackney Wick and Fish Island	Retain – as Policy 1.2 and 1.3
	Policy 1.5: Improving the public and private realm in Hackney Wick and Fish Island	Retain – as the future development of Hackney Wick and Fish Island progresses, the role of public realm will play an important role in creating the areas sense of place and help in preserving the areas unique identity. This should be accompanied by a strategy to use these spaces for cultural and where appropriate night time activities to further animate the area.

Subarea 2: North Stratford & Eton Manor	Policy 2.1: Housing typologies (provide a mix of housing typologies)	Retain / Amend – the evolution of this area is dependent on the future of residential development. A diverse mix of housing typologies will ensure a broad demographic, including families are attracted to the area. Attracting families to the area – will ensure a long-term sense of community is created. The future development of student housing alongside family and other community homes should be reflected within this policy. In encouraging families to move to the area, partners should also seek opportunities (potentially with exiting occupiers) to deliver a more diverse and family friendly cultural and night time offer.
	Policy 2.3: Improving connections	Retain / Amend – connections and wayfinding to other location within the LLDC area should be of strategic importance within the new Local Plan. Improving links will strengthen the holistic LLDC brand and offer as destination for creative, cultural and leisure activity.
	Policy 2.4: Local Centre and non-residential uses	Retain – East Village is expected to grow following the completion of a number of residential developments. As a result, the local centre will need to serve the growing population. The local centre located around East Village has the potential to develop its own distinct identity and support additional networking between creative occupiers.
Subarea 3: Central Stratford and Southern Queen Elizabeth Olympic Park	Policy 3.1: Stratford High Street Policy	Retain/Amend – Stratford High Street is an important strategic route for the LLDC area and links Pudding Mill and Bromley-by-Bow with Central Stratford. With future development such as Carpenters Estate, there is an opportunity to develop a cultural and amenity offer along this route and help

		<p>better connect the southern LLDC area with the Metropolitan Centre in Stratford.</p> <p>The policy should support mixed use development along the high street, accommodating new creative and cultural uses. In the short term freeholders should be encouraged to fill voids with uses to test new types of activity and encourage people to venues further from the town centre,</p>
	<p>Policy 3.2: Improving connections around Central Stratford</p>	<p>Retain / Amend – the enhancement of connections between key locations within Central Stratford should remain a priority. With the development of the IQL and CED, public realm and connectivity in around these developments should also be emphasised in new policy.</p> <p>Where possible, this should encourage delivery of new retail and cultural facilities on the edge of the town centre.</p>
<p>Subarea 4: Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Meads</p>	<p>Policy 4.1: A potential District Centre</p>	<p>Retain / Amend - the redevelopment of Bromley-by-Bow will play a significant role in the future of this area. This will help support the new residential community that will be generated by the planned large-scale housing development. The importance of the other local centres as such as Strand East should also be given strategic priority, as these also have an important role to play in the future of this area.</p> <p>Again, developers should be familiarised with the space typologies set out in this report and encouraged to innovate in their use of mixed use to accommodate new creative and cultural uses and those which may move from elsewhere in the LLDC area.</p>
	<p>Policy 4.2: Bringing forward new</p>	<p>Retain – the introduction of new routes will ensure new development is not delayed</p>

connections to serve new development	and is delivered at an appropriate pace to support the necessary growth in the area.
Policy 4.3: Station improvements	<p>Retain – station improvements will be crucial to attracting new visitors and consumers to the area to take advantage of the new cultural offer anchored by the CED. Improved signposting from stations will help link disparate elements of the local offer together.</p> <p>Other improvements, such as; safety and street lighting should also be considered in this area – observation research and anecdotal evidence suggests these are current issues in the area.</p>
Policy 4.4: Protecting and enhancing heritage assets at Three Mills Island and Sugar House Lane	<p>Retain / Amend – whilst a significant element of change is expected in this area, the importance of assets such as Three Mills Studio and Sugar House Lane are vital to the area’s identity and credibility as a location of international cultural significance. These assets should be preserved alongside other important assets such as the Three Mills Wall River and Three Mills Island.</p>

Source; LLDC Local Plan

Appendix A - Creative Definition

A.1 During our research, we have redefined our definition of the creative sector in the LLDC to ensure it more accurately reflects the current creative activities taking place in the area. This section explains more detail on these revised definitions and the reasoning behind the modifications.

Revised Creative Statistical Definition

A.2 During our initial desk-based research, we anticipated using the DCMS definition, which is widely regarded the best-fit definition for statistically measuring the creative sector. Some of the key sub-sectors within this definition include:

- Advertising & Marketing
- Architecture
- Crafts
- Design
- Film, TV, video, radio & photography
- IT, software & computer services
- Museums, galleries & libraries
- Music, performing & visual arts
- Publishing

A.3 To better reflect the size of the creative sector in LLDC, we have included a further creative sub-sector whose activities are largely creative in their nature.

- Fashion Manufacturing

A.4 Added to the DCMS definition previous shown, creates a new definition of the creative sector, named 'DCMS+'. This better reflects the level of creative activity taking place in LLDC.

Statistical Definition

SIC Code	DCMS+	Grouping
11050	DCMS+	Making and Craft
14110	DCMS+	Making and Craft
14120	DCMS+	Making and Craft
14131	DCMS+	Making and Craft
14132	DCMS+	Making and Craft
14141	DCMS+	Making and Craft
14142	DCMS+	Making and Craft
14190	DCMS+	Making and Craft
14200	DCMS+	Making and Craft
14310	DCMS+	Making and Craft
14390	DCMS+	Making and Craft
15120	DCMS+	Making and Craft
15200	DCMS+	Making and Craft
32120	DCMS+	Making and Craft
58110	DCMS+	Desk-Work
58120	DCMS+	Desk-Work
58130	DCMS+	Desk-Work
58141	DCMS+	Desk-Work
58142	DCMS+	Desk-Work
58190	DCMS+	Desk-Work
58210	DCMS+	Desk-Work
58290	DCMS+	Desk-Work
59111	DCMS+	Artistic
59112	DCMS+	Artistic
59113	DCMS+	Artistic
59120	DCMS+	Artistic
59131	DCMS+	Desk-Work
59132	DCMS+	Desk-Work
59133	DCMS+	Desk-Work
59140	DCMS+	Desk-Work
59200	DCMS+	Artistic
60100	DCMS+	Artistic
60200	DCMS+	Artistic
62011	DCMS+	Desk-Work
62012	DCMS+	Desk-Work
62020	DCMS+	Desk-Work

70210	DCMS+	Desk-Work
71111	DCMS+	Desk-Work
71112	DCMS+	Desk-Work
73110	DCMS+	Desk-Work
73120	DCMS+	Desk-Work
74100	DCMS+	Desk-Work
74201	DCMS+	Artistic
74202	DCMS+	Artistic
74203	DCMS+	Light Industrial
74209	DCMS+	Artistic
74300	DCMS+	Desk-Work
85520	DCMS+	Desk-Work
90010	DCMS+	Artistic
90020	DCMS+	Artistic
90030	DCMS+	Artistic
90040	DCMS+	Desk-Work
91011	DCMS+	Desk-Work
91012	DCMS+	Desk-Work
91020	DCMS+	Desk-Work

Appendix B - Cultural Definition

B.1 We have adapted our cultural sector definition using DCMS guidance. This outlines the following sub-sectors:

- Advertising & Marketing
- Architecture
- Crafts
- Arts and Music
- Film, TV, Video, Radio and Photography
- Cultural Education
- Museums, Galleries and Libraries
- Heritage

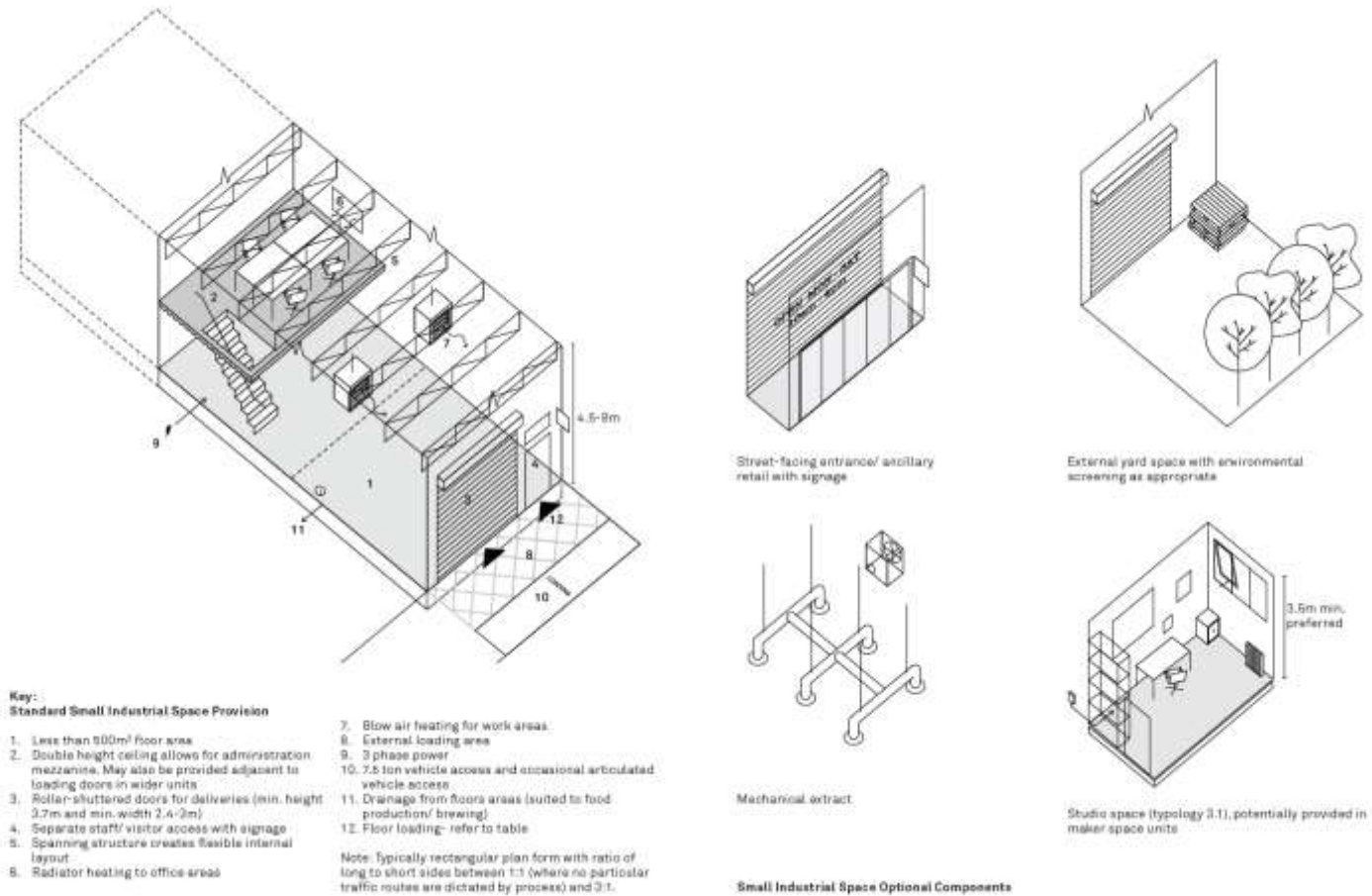
B.2 The table below sets out the SIC codes that comprise the Cultural Sector.

Statistical Definition

SIC Code	DCMS Cultural Definition	Grouping
1820	Cultural	Arts and Music
1820	Cultural	Arts and Music
1820	Cultural	Arts and Music
3212	Cultural	Crafts
3220	Cultural	Arts and Music
4763	Cultural	Arts and Music
5911	Cultural	Film, TV, Video, Radio and Photography
5911	Cultural	Film, TV, Video, Radio and Photography
5911	Cultural	Film, TV, Video, Radio and Photography
5912	Cultural	Film, TV, Video, Radio and Photography
5913	Cultural	Film, TV, Video, Radio and Photography
5913	Cultural	Film, TV, Video, Radio and Photography
5913	Cultural	Film, TV, Video, Radio and Photography
5914	Cultural	Film, TV, Video, Radio and Photography
5920	Cultural	Arts and Music
6010	Cultural	Film, TV, Video, Radio and Photography
6020	Cultural	Film, TV, Video, Radio and Photography
7420	Cultural	Film, TV, Video, Radio and Photography
7420	Cultural	Film, TV, Video, Radio and Photography
7420	Cultural	Film, TV, Video, Radio and Photography
7420	Cultural	Film, TV, Video, Radio and Photography
8552	Cultural	Cultural Education
9001	Cultural	Arts and Music
9002	Cultural	Arts and Music
9003	Cultural	Arts and Music
9004	Cultural	Arts and Music
9101	Cultural	Museums, Galleries and Libraries
9101	Cultural	Museums, Galleries and Libraries
9102	Cultural	Museums, Galleries and Libraries
9103	Cultural	Heritage

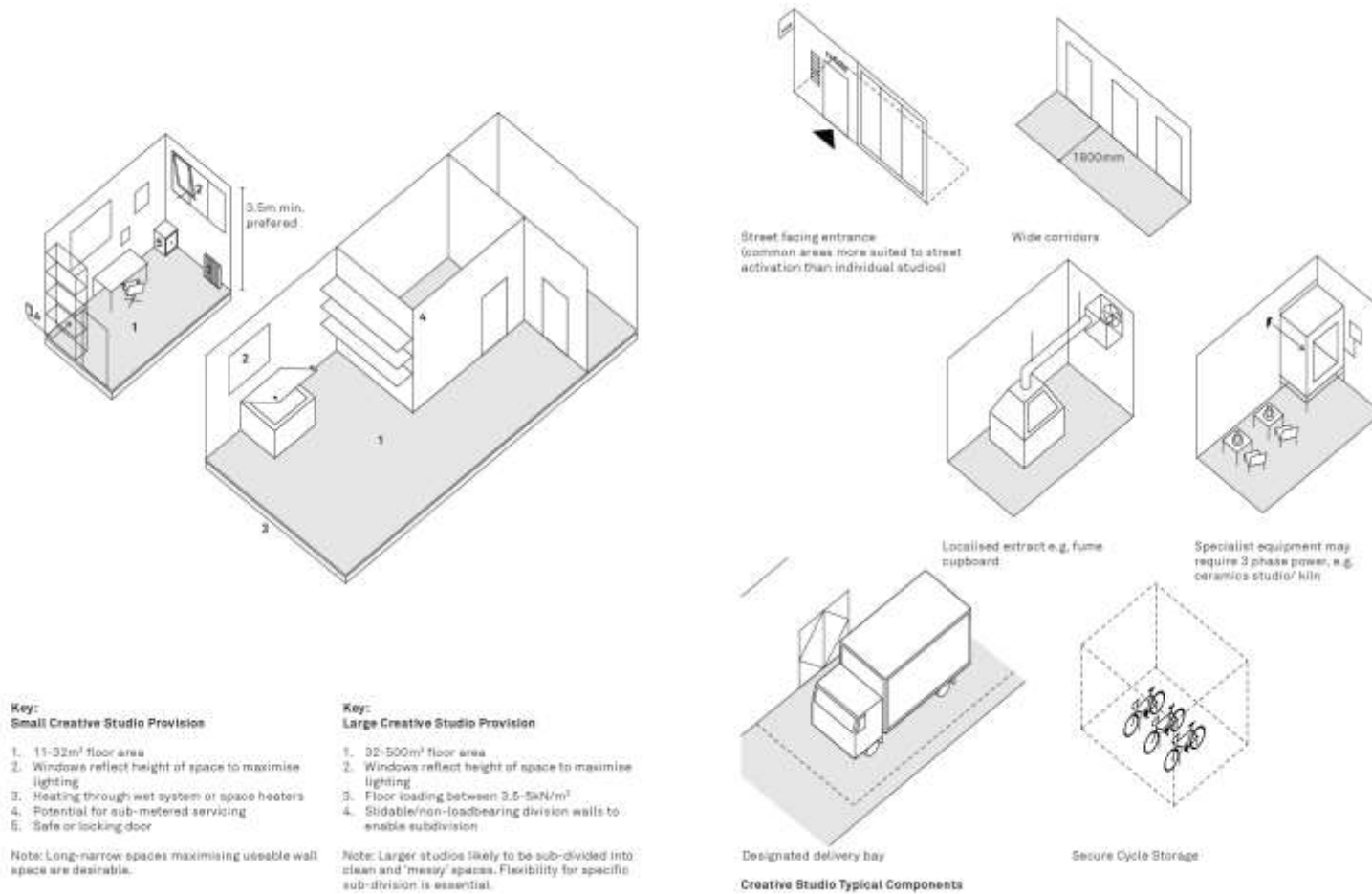
Appendix C - Workspace and Small Industrial Space Requirements

Figure 8.1 Standard Small Industrial Space Provision



Source: LLDC Employment Space Study, 2015

Figure 8.2 Small Creative Studio Provision



Source: LLDC Employment Space Study, 2015

Appendix D - Current Policy & Strategic Drivers

D.1 Creative and cultural industries are an increasingly important focus in policies locally and in London. Below several strategies relating to the creative, cultural and night-time industries that have been published in recent years are introduced, offering a strategic backdrop to this report.

London Agenda

The Draft London Plan (2017)

- D.2 The new London Plan recognises the important role that cultural and creative industries play in making London an attractive destination for business, talent, investment and tourism.
- D.3 The Plan commits to support growth in the cultural and creative sector across London and help creative people to set down roots in the capital. To deliver this the Mayor has committed to piloting Creative Enterprise Zones; defined geographical areas in London which will offer a tailored package of incentives to secure the future of artistic and creative workspace and cultural facilities; and enable artists and creatives to put down roots in their communities.
- D.4 The London Plan recognises the need to provide affordable workspace and low-cost business space and commits to set out policies to improve provision of affordable workspace for start-ups, artists and creative industries. To this end, the Plan notes that the Mayor is currently exploring options for a Creative Land Trust, a dedicated fund to acquire buildings for use as affordable workspace for artists in perpetuity.
- D.5 The draft London Plan also explicitly sets out the strength and importance of London's cultural economy. It re-emphasises London's role as a 24-hour city and sets out plans to protect and grow the city's cultural and creative industries. The plan emphasises culture's role in building strong communities, increasingly healthy life outcomes and generating civic pride.

- D.6 The Plan also states the importance of the night-time economy, and has asked every borough to develop a vision to support its growth and to ensure it works for everybody in a way that is safe and sustainable. The plan encourages diversification of night-time activities in town centres, extending opening hours of businesses like shops, cafés, libraries, galleries and museums. Protecting and supporting night-time cultural venues, including pubs, clubs, cinemas, music and arts venues is also a key priority of the Plan.
- D.7 The London Plan asks local authorities to identify or enhance existing 'Cultural Quarters' to help create attractive and vibrant areas for residents, workers and visitors. Cultural Quarters should build on the existing character of an area and encourage a mix of cafés, restaurants and bars alongside cultural venues. Boroughs will be asked to support pop-ups and cultural activities in vacant properties, such as the Printworks in Canada Water, as a way of creating longer-term cultural use across the city.
- 8.43 Boroughs are encouraged to:
- Develop an understanding of the existing cultural offer in their areas
 - Evaluate what is unique or important to residents, workers and visitors
 - Develop policies to protect and promote these assets, particularly locally-distinct clusters and where they provide an anchor for local regeneration and town centre renewal.

The Cultural Infrastructure Plan

- D.8 The Cultural Infrastructure Plan is a manifesto commitment by the Mayor of London and one of his top priorities. When published, it will identify what London needs to sustain and develop its cultural infrastructure and set a roadmap to 2030. The plan will support the capital's creative and cultural industries, local and regional authorities, developers and other bodies involved in cultural planning and regeneration.

Mayor of London's Economic Development Strategy (2017)

- D.9 The emerging draft of the Mayor of London's Economic Development Strategy suggests that the culture and creative industries, and the tech and digital sectors will be among those targeted for growth in the future. Both sectors are fundamental to the future of London in securing new employment growth and in helping to secure new opportunities for businesses in other sectors of the economy (e.g. digital developments supporting other sectors).

D.10 The Olympic Park and the wider LLDC area have been identified as playing a specific role in meeting the aims above and supporting the growth in the London economy. The strategic roles in which the LLDC area has to play are detailed below.

Queen Elizabeth Olympic Park Innovation District

D.11 The Queen Elizabeth Olympic Park is developing into an innovation district that is home to a cluster of academic institutions and businesses engaged in research, design, development and manufacture. These organisations are coalescing around a number of modern industrial sectors, including:

- Construction and the built environment.
- The automotive industry, including autonomous vehicles, low carbon engines and energy storage.
- Digital technology.
- Fashion and related creative businesses. A cluster of expertise around the future of cities is emerging, comprising:
 - The Digital Engineering and Test Centre – which is using virtual engineering tools and techniques to accelerate the development of automotive systems, helping to cut emissions
 - The Advanced Propulsion Centre - looking at electric drive chain development
 - UCL robotics – researching the application of autonomous systems in life sciences, healthcare, manufacturing and creative industries
 - The High Speed Sustainable Manufacturing Institute - looking at localised and circular economy value chains
 - The Future Living Lab – centred around UCL’s world-leading research in the design, development and operation of smart, sustainable cities. East Works will work across the local community to develop the technical skills east Londoners need to be able to work in and to lead businesses in these sectors.

East London Fashion Cluster

8.44 Initiated by London College of Fashion, and supported by the Mayor of London, a partnership consisting of UKFT (UK Fashion & Textiles Association), BFC (British Fashion

Council), LLDC, and Poplar HARCA has united around a shared ambition to retain and strengthen London's status as a global fashion capital. The East London Fashion Cluster (ELFC) partnership aims to capitalise on east London's historic and re-emerging status as a centre for fashion innovation, design, manufacture and retail, as well as the opportunities presented by the imminent relocation of the London College of Fashion to Stratford Waterfront. The partnership has developed a broad-ranging Action Plan to support the sector. It aims to tackle a range of structural issues facing the sector, including access to finance, affordable space and skills. The aim is to create a more resilient fashion sector in London with the capacity to innovate across the value chain.

Vision for a 24-Hour London

D.12 London's night-time and cultural economy is a key priority for the Mayor, who launched London's first ever 24-hour vision in 2017, and appointed Amy Lame as the first Night Czar of London in 2016. The 24-hour vision focuses on ten principles to assist the city in becoming a trailblazing city at night, competing with the likes of Berlin, Tokyo and New York. It addresses the under-recognition and historic lack of protection of London's diverse cultural and night-time assets in recent years. The principles (listed below) focus on building a night-time culture which serves the needs of all Londoners and visitors to the capital.

- 1) Be a global leader.
- 2) Provide vibrant opportunities for all Londoners, regardless of age, disability, gender, gender identity, race, religion, sexual orientation or means.
- 3) Promote all forms of cultural, leisure, retail and service activity.
- 4) Promote the safety and wellbeing of residents, workers and visitors.
- 5) Promote welcoming and accessible nightlife.
- 6) Promote and protect investment, activity and entrepreneurship.
- 7) Promote domestic and international visits to London.
- 8) Be strategically located across London to promote opportunity and minimise impact.
- 9) Become a 24-hour city that supports flexible lifestyles.
- 10) Take account of future global and domestic trends in leisure, migration, technology, employment and economics.

- D.13 The key approach in the Mayor's night-time vision is to build on London's diversity, and capitalise on the growth of the night-time economy to make it a big earner and employer, whilst looking at ways to make it safer. It highlights the need to support a range of activities, not just eating and drinking, as well as reducing the closure of LGBT+ spaces and grassroots music venues, with a focus on sustaining these facilities.
- D.14 The vision also focuses on the need to overcome frictions between residential and night-time uses, and that this will involve decoupling the night-time economy from its link with antisocial behaviour, and supporting night-shift workers.
- D.15 The LLDC area has the opportunity to be a major centre for London's night-time economy that delivers on these objectives, through supporting its diverse range of cultural assets and promoting their growth through future developments such as the Cultural and Education District. There is significant potential here to develop a distinctive night-time offer which fulfils a strategic need for London (e.g. in live music) and which provides a mix of activities unavailable elsewhere in the east of the city.

Night tube service

- D.16 As part of the Mayor's night vision, the night tube service was opened in 2016, and there are plans to extend its use. The over ground night-time service opened in December between New Cross Gate and Dalston Junction, as part of a focus on connecting east London.

Night-time economy borough champions

- D.17 The night czar held 'night surgeries' in March 2017, to enable the creation of a network of night-time economy borough champions. These are formed of Hackney, Newham, Tower Hamlets and Waltham Forest.
- D.18 The first summit was held on women's safety at night in July 2017, which led to the creation of London's first Women's Safety at Night Charter. This includes initiatives such as 'Ask for Angela' in London bars.

Local Agenda

LLDC Local Plan 2015-2030 (2015)

- D.19 The current LLDC Local Plan is the overarching planning tool that is used by LLDC to help shape the area. The first objective of the Plan, is to deliver business and employment growth with particular emphasis placed on the cultural and creative sectors.
- D.20 The plan commits to protect creative and productive industries at Hackney Wick and Fish Island to support the continuation of an entrepreneurial and enterprising work culture. In addition to this, the plan commits to promote places where public and employment uses animate the private and public realm. Whilst this is the current statutory planning document for the LLDC, due to the rapid development and change witnessed in the area the Local Plan is now being reviewed.

Supplementary Planning Guidance

- D.21 The supplementary planning guidance for the new London Plan also emphasises the benefits of night-time economic activity.
- D.22 It encourages boroughs to develop policies for new and existing cultural facilities, including providing arts and cultural facilities in major mixed developments. It highlights that outer London boroughs should encourage cultural infrastructure where it contributes to regeneration and town centre renewal.
- D.23 Stratford is listed as a strategically important night-time economy cluster of 'more than local importance' (along with Brick Lane, Dalston and South Kensington).
- D.24 The guidance highlights that as a cluster, Stratford should:
- Diversify uses and opening times (e.g. explore extending the opening times of existing day time facilities such as cafés and libraries)
 - Build on local issues/opportunities around the night-time economy
 - Ensure night venues are served with adequate night-time transport
 - Improve inclusive access and safety
 - Identify cultural quarters.

- D.25 The Plan also introduces the Agent of Change principle, whereby developers building new residential properties will be responsible for ensuring they are adequately soundproofed and designed to reduce sound from nearby clubs, pubs and live music venues.
- D.26 The LLDC needs to respond to this national and local policy context by:
- developing a vision for the night-time economy to support its growth;
 - diversifying uses and opening times;
 - ensuring night venues are served with adequate night-time transport;
 - and improving inclusive access and safety.

Local Policy: Licensing Restrictions

- 8.45 The LLDC area's licensing policy is controlled by the four separate boroughs that it is located in. Any night-time strategy will be influenced by these policies, dependent on what borough the specific asset is in. The Licensing Act (2003) states that each council must review and re-publish its licensing policy every five years.

Borough of Hackney Licensing Policy 2018-2023

- D.27 New licensing restrictions are currently out for consultation. In summary, they state that:
- D.28 The two current two Special Policy Areas (SPAs), which are Dalston and Shoreditch, are to be maintained and the one in Shoreditch extended in size. SPAs are generally where new applications for licences are refused unless the applicant can demonstrate there will be no additional cumulative impact to the night-time environment.
- D.29 The core hours policy for the whole borough sets out the generally acceptable hours of operation for licensable premises and activity, with some flexibility. In Hackney, these are out for consultation at:
- Monday to Thursday 8am-11pm
 - Friday and Saturday 8am to 12am
 - Sunday 10am to 10:30pm
- D.30 The policy on external areas and outdoor events such as beer gardens, terraces, street parties and pop-ups are proposed to be restricted to between 8am to 10pm.

D.31 This new policy has attracted significant criticism from organisations such as 'We Love Hackney'. They state that introducing earlier closing times of 11pm in the week and 12am at the weekends will make the borough a less diverse and creative place to live.

Borough of Newham Licensing Policy 2014-2019

D.32 The policy has no specific guidelines on opening hours and restrictions. Each case is decided on its own merits.

Borough of Tower Hamlets Licensing Policy 2018-2023

D.33 This licensing policy is currently under consultation.

D.34 There currently exists one Cumulative Impact Zone (CIZ) around the Brick Lane area. This is similar to an SPA, where new licences are usually refused unless the applicant can show that the operation of a new premises will not add to the cumulative impact already being experienced. It is proposed to extend the CIZ to include an area in Bethnal Green.

8.46 The core hours policy is under consultation at:

- Monday to Thursday 6am to 11:30pm
- Friday and Saturday 6am to 12am
- Sunday 6am to 10:30pm

Borough of Waltham Forest Licensing Policy 2017-2023

D.35 No specific core hours policy is stated, instead the Council adopts a flexible approach with arbitrary restrictions avoided. Fixed predetermined closing times for particular areas or zones do not form part of the Council's licensing policy.

Appendix E - LLDC Local Plan, 2015 – Subarea Policy

Hackney Wick and Fish Island

Policy 1.1: Managing change in Hackney Wick and Fish Island

- 8.47 Proposals for development within Sub-Area 1 will be considered acceptable where they:
1. Maintain the overall amount of existing employment floorspace (B Use Class), including that used by creative and cultural industries and operating as low-cost and managed workspace (in accordance with the provisions outlined under Policies B.1 and B.4)
 2. Propose employment floorspace falling within B1 (a), B1 (b), B1 (c) and B2 Use Classes inside the Hackney Wick Station Area allocation boundary, and B1 (b), B1 (c), B2 and B8 Use Classes outside it
 3. Restore and reuse buildings of heritage value for employment uses.
- Cross-reference to policies: B.1; B.4.

Policy 1.2: Promoting Hackney Wick and Fish Island's unique identity and appearance

- 8.48 Proposals for development within Sub-Area 1 will be considered acceptable where they:
1. Reinforce local distinctiveness by incorporating high-quality and distinctive architecture that uses durable and suitable materials which reference the area's industrial past
 2. Enhance existing yards and poor-quality and under-used passages and streets
 3. Create new open spaces that complement the identity of the area
 4. Allow for future changes in use through flexible design
 5. Respect the contribution made by cultural and creative industries to the identity, culture and character of the area.
- Cross-reference to policies: BN.1; BN.2; BN.7; BN.16; T.9 Sub-Area Policy: 1.4.

Policy 1.3: Connecting Hackney Wick and Fish Island

- 8.49 Proposals for development within Sub-Area 1 will be considered acceptable where they:
1. Relate well to key nodes of public activity and routes
 2. Enable access to north-south walking routes between Wallis Road and Monier Road
 3. Provide active frontages along streets and public routes
 4. Connect with existing/proposed bridges where possible
 5. Offer passages through yards and building plots where appropriate and support the creation of a new network of pedestrian passages and streets
 6. Improve connections across and into the area, including through the provision of new bridges across waterways and the A12, where appropriate.
- Cross-reference to policies: T.1; T.2; T.3; T.5; T.6; T.9; T.10.

Policy 1.4: Preserving or enhancing heritage assets in Hackney Wick and Fish Island

- 8.50 Proposals for development in Sub-Area 1, within the boundary or immediate setting of heritage assets (see Figure 30), will be considered acceptable where they:
1. Preserve or enhance the special architectural or historic interest that has been identified within the appraisals of those heritage assets, in particular historic buildings, structures, yards, waterways and the pre-war residential and industrial street patterns that give the area its unique character
 2. Enhance and reveal the significance of heritage assets, including the Lee Navigation and Hertford Union Canal
 3. Restore and reuse heritage assets located within application boundaries as part of new development
 4. Exhibit an understanding of and reference the architectural and historic interest of the area within their design
 5. Retain street trees and/or provide these, where appropriate.
- Cross-reference to policy: BN.16 Sub-Area Policy: 1.2

Policy 1.5: Improving the public and private realm in Hackney Wick and Fish Island

8.51 In order to ensure that development benefits from the positive qualities of the public and private realm within Sub-Area 1, proposals for development will only be considered acceptable where they:

1. Relate well to waterways, green infrastructure and Queen Elizabeth Olympic Park
2. Contribute to the provision of green infrastructure and urban greening
3. Promote pedestrian access to, across or along historic canal and river frontages.

Cross-reference to policies: SP.3; S.7; BN.2; T.9; T.6 Sub-Area Policies: 1.2; 1.3

Policy 1.6: Building to an appropriate height in Hackney Wick and Fish Island

Proposals for development greater than 20 metres above ground level will only be acceptable subject to the provisions outlined within Policy BN.10. Cross-reference to policies: BN.10, BN.1

North Stratford and Eton Manor

Policy 2.1: Housing typologies

Development proposals within Sub-Area 2 will be required to provide a mix of housing typologies, with an emphasis on the inclusion of housing appropriate for families, except in those locations where the other policies in this Local Plan indicate that tall buildings or the highest density of development is acceptable. Proposals will be required to demonstrate that the housing typologies will relate directly to, and reinforce, the street hierarchy. Proposals must be able to demonstrate that they contribute to achieving Lifetime Neighbourhoods. Cross-reference to policies: H.1; H.2; BN.4; BN.5; T.5

Policy 2.2: Leyton Road – Improving the public realm

The Legacy Corporation in its role as Local Planning Authority will work with its partners to promote improvements to the public realm along Leyton Road. Proposals for new development which has a frontage to Leyton Road will be required to demonstrate that it

has been designed to improve the streetscape, and provide buildings that can accommodate active frontages, and will be expected to contribute significantly to improvement of the public realm. Cross-reference to policies: BN.1; T.6

Policy 2.3: Improving connections

The Legacy Corporation in its role as Local Planning Authority will work with its partners to promote improved connectivity along and across Leyton Road to improve access between East Village, Chobham Farm, Maryland and Leyton, and improved connections for Eton Manor. Connective routes should have a high-quality streetscape and be lined by active frontages where possible. Proposals for new development will be expected to demonstrate that they facilitate the future provision of new routes to connect the new and established areas and their street patterns. Cross-reference to policies: T.6; T.9

Policy 2.4: Local Centre and non-residential uses

- 8.52 Non-residential uses, including Use Class A1–A5 and B1a, within Sub-Area 2 should be small-scale, serve localised need and be concentrated within the designated Local Centre. Outside of the Local Centre, proposals for these uses should be located along key routes and/or in relation to public spaces and should be of a scale that will serve the needs of its immediate surroundings or be ancillary to a main use with which it is associated. Cross-reference to policy: B.2

Central Stratford and Southern Queen Elizabeth Olympic Park

Policy 3.1: Stratford High Street Policy Area

Proposals for mixed-use development along Stratford High Street will be required to demonstrate that it will enhance the character, townscape and function as a lively main street, by ensuring that non-residential elements of mixed-use schemes maximise flexibility of function and are vertically and horizontally integrated with residential areas. Introduction of new, medium-scale retail, leisure and community uses may be appropriate, subject to a positive retail impacts assessment on planned public and private investment and vitality and viability of the Centres (see Policy B.2). Proposals for development greater than 27 metres above ground level will be subject to Policy BN.10.

Public realm improvements and key connections as shown in Figure 34 should be enhanced. Cross-reference to policies: B.2; BN.10

Policy 3.2: Improving connections around central Stratford

- 8.53 The Legacy Corporation will work with its partners to promote improved connectivity and public realm improvements shown as key connections, key connections to be enhanced and principal connection improvements within Figure 34, in particular a new pedestrian bridge from Jupp Road and facilitating a western entrance to Stratford Regional Station. Proposals for new development along these key connections for enhancement should be orientated towards the street scene and maximise active frontages where possible. Key connections shall be improved to enhance accessibility and multi-functionality for all users. Section 106 contributions shall also be sought towards these improvements where necessary. Cross-reference to policy: T.6

Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Mead

Policy 4.1: A potential District Centre

- 8.54 The Legacy Corporation supports the future designation of a new District Centre at Bromley-by-Bow, in accordance with Table A2.2 of Annex 2 of the London Plan 2011. Proposals for development will be required to demonstrate that they:
1. Achieve, or are part of, a comprehensive development of the Bromley-by-Bow Site Allocation area
 2. Include an appropriate mix and balance of uses that together have the potential to function as a District Centre. This mix should include retail, employment, community uses, a primary school, open space
 3. Respond positively to the adjacent waterways and listed buildings at Three Mills
 4. Provide appropriate on-site infrastructure that will be secured through a Section 106 Agreement needed to make the development acceptable, such as appropriate access arrangements to the site for pedestrians, vehicles and transport
 5. Contribute to the wider aspirations for design and regeneration of the wider Bromley-by-Bow area.

Policy 4.2: Bringing forward new connections to serve new development

8.55 Development proposals within Sub-Area 4 should not prejudice and, where relevant, should contribute towards the improvement of existing and the delivery of new connections necessary to serve the anticipated needs of development within the Sub-Area. The improvements to existing and new connections considered necessary for the delivery of the development anticipated within this Sub-Area are:

1. Accessibility improvements including a new junction on the A12 at Bromley-by-Bow that serves the potential new District Centre by improving access for pedestrians, cyclists, buses and general traffic
2. Improving the pedestrian underpass adjacent to Bromley-by-Bow Station and linking pedestrian and cycle routes to allow access to the new District Centre and the Lee Valley Regional Park beyond
3. New and improved vehicle, pedestrian and cycle bridges across the River Lea; a new all-movements junction on the A118 to improve access to and from Sugar House Lane for pedestrians, cyclists, buses and general traffic
4. A new bridge across the Bow Back River linking to the all-movements junction and connecting with Marshgate Lane
5. Delivery of a cycle superhighway route along Stratford High Street
6. Delivery of a west-east pedestrian and cycle route, parallel with Stratford High Street, through Pudding Mill, across the Greenway and through the Greater Carpenters area parallel to Stratford Metropolitan Centre
7. Pedestrian and cycle improvements at Bow Interchange
8. New and improved pedestrian and cycle links from Pudding Mill Lane DLR Station to Queen Elizabeth Olympic Park via the Greenway and Southern Loop Road.

Policy 4.3: Station improvements

8.56 In considering proposals to improve Bromley-by-Bow Station, the Legacy Corporation will support proposals that improve accessibility to and within the station and enhance its visual presence within the area. The Legacy Corporation will also require proposed development on adjacent sites to provide walking routes within their sites that are orientated towards the station and help provide legible and direct access to it.

Policy 4.4: Protecting and enhancing heritage assets at Three Mills Island and Sugar House Lane

8.57 Proposals for new development or new uses within existing buildings within Three Mills Island will need to demonstrate that they preserve or enhance the character of the Conservation Area and the setting of the listed buildings, while complementing the range of existing employment, including cultural and creative employment and community uses. Proposals for development should also preserve or enhance the character and appearance of the Sugar House Lane Conservation Area. Views from these Conservation Areas will be protected from inappropriate development elsewhere in the Sub-Area.





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