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WE MADE THAT
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LLDC: COMBINED ECONOMY STUDY
PART A: BUSINESS SURVEY

LLDC: Combined Economy Study
Part A: Business Survey
Final Version - 22-03-18

Written and produced by:

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WE MADE THAT

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Commissioned by:
London Legacy Development Corporation

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INTRODUCTION

Overview

Introduction

We Made That, along with Regeneris Consulting, 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.

The commission includes:

- A Local Economy Study and Business Survey (Part A)
- Creative and Cultural Opportunities Assessment (Part B)
- A Retail and Town Centre Needs Assessment (Part C)

This report is the business survey. It provides detailed and up-to-date information on the businesses and collective local economy of the LLDC area and its surrounding neighbourhoods. Information collected through this business survey seeks to help make sense of the LLDC area's local economy by recording all job-generating uses across the area's diverse geographies. The evidence and analysis from this work will complement and inform the review the Legacy Corporation's Local Plan during 2018 and 2019, providing evidence to determine the direction of future policies in the Local Plan.

Along with the Local Economy Study, this study will inform strategies and policy for workspace provision, business support and help to support sustainable regeneration in these complex localities.

Policy Context

The LLDC is now due to review its Local Plan during 2018 and 2019 and therefore requires updated evidence to determine the direction of future policies in the Local Plan. This Local Plan review has been planned to correlate with the publishing of the new Draft London Plan and in expectation of the strategic policy intentions the Plan will set in relation to retail growth, cultural, creative and night time economy uses, as well as new approaches to London's Town Centres. As a Mayoral Development

Corporation the LLDC will work alongside the Mayor to help deliver the aims of the London Plan, and this business survey forms part of the evidence base the LLDC will use to inform how the authority works to deliver both local and London-wide economic, social and place-making ambitions.





It is also aware of the Mayor of London's aspirations for cultural and creative hubs and therefore wishes to assess the potential future role of Hackney Wick as a cultural and creative hub, and Hackney Wick and Stratford as night time economy destinations.

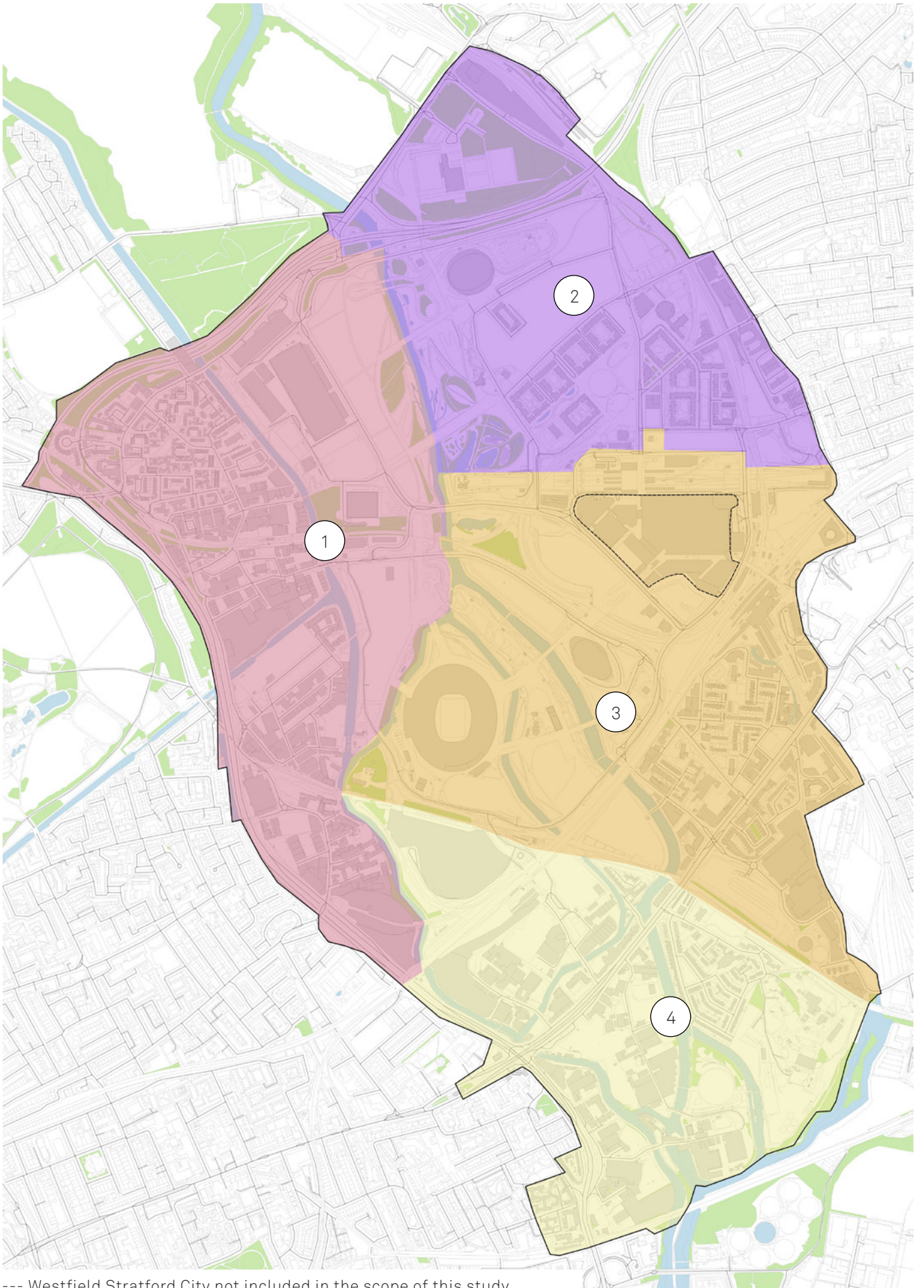
Approach

This work makes use of a mix of qualitative and quantitative research methods to provide a careful and nuanced understanding of the LLDC area's local economy. The study builds upon previous local economy surveying, particularly the 2014 Local Economy Study, as well as previous consultation and employment land reviews of the area. At its core, this study aims to collate the most up-to-date and accurate business activity information through on-site primary research. While the findings reveal a well-occupied employment area with low churn, this study should be understood as a snapshot in time, capturing uses and premises in operating in late 2017.

The total study area is made up of four individual sub-areas, mapped on the page opposite, neighbouring each other around the Queen Elizabeth Olympic Park (QEOP). This study omits Westfield Stratford City, as it is covered in detail in a separately in the retail and town centre needs study.

KEY

- | | | | |
|---|---------------------------------|---|---|
|  | 1. Hackney Wick & Fish Island |  | 3. Central Stratford & Southern QEOP |
|  | 2. North Stratford & Eton Manor |  | 4. Bromley-by-Bow, Three Mills & Pudding Mill |



--- Westfield Stratford City not included in the scope of this study.

Study methodology

The research and analysis informing the study took place across three stages:

Observational research & data gathering

Basic businesses information was gathered using a door-to-door assessment and accompanying structured interviews. Given the typically lower level of end-user interaction, industrial-type businesses can have limited online presence and purely desk-based research is likely to miss the exact scope and breadth of businesses on site, despite these businesses being integral to the character of the area and important contributors to local economy.

Every business or employment site has been mapped by a team of researchers. This includes retail, food and drink, and leisure uses other than those in Westfield Stratford City, where employees are present on a regular daily basis. The following data was collected by this observational study:

- Name of business
- Address
- Number of units occupied
- Primary activity
- Type of space occupied
- Estimated number of employees
- Associated yard space / parking provision

In addition to the data gathered during site visits, businesses were allocated a Standard Industrial Category (SIC) code based on its primary business activity. These codes were used, in conjunction with on-the-ground knowledge of operations to group businesses into 'business activity' categories, which have been used to analyse the prevalence of different sectors across the study sites and as the basis of comparison with other industrial sites in London. Additionally, each building within the study boundaries was assigned a building type, based on estimated size, associated yard and parking space and business use, in order to better classify and understand the built form and urban fabric that host the range of businesses across the study site.

Alongside this more quantitative audit, researchers carried out a number of longer interviews with

some businesses. These interviews collected more detailed information on the number of employees, customer and supplier locations, as well as more qualitative information on individual business aspirations.

GIS mapping & data analysis

Data gathered from these research streams has been entered into a central database and analysed using GIS mapping software to build up a picture of business activities, building types, employment densities and footprint ratios across sites.

Employment density was calculated using known and estimated employment numbers for every business located within the boundaries of each individual building footprint or business unit, as well as for a smaller set of sub-areas. Estimated employment numbers were based on building type, size and business activity. This process also verified the size categorisation of each business's workspace unit.

Case studies

Following on from this quantitative data collection, a range of local businesses have been selected as case studies. This case studies selection aims to further detail emerging employment and workspace trends in the area and to provide more detailed insights into the type, size and activity of businesses operating across the LLDC's different sub-areas.

Approach to retail businesses

The business survey does not set out to capture the full range of retail businesses in the LLDC area. This sector of the economy is covered in full an accompanying Retail & Town Centre Needs Assessment report. Retail activity across the four sub-areas have been captured by the survey where found in order to accurately capture how different kinds of employment space are being used, but the LLDC's core retail offer, Westfield Stratford City, is excluded from the survey work given its scale and purpose-built retail nature.



The LLDC area is a unique mix of studio and workshop complexes, industrial estates, office buildings and sports and leisure facilities. Redevelopment and regeneration of the area is ongoing.



The LLDC area continues to host a clusters of live-work and artists' studio buildings.



The LLDC area is home to many small-scale food & drink, textile and fabrication businesses.

Definitions

This study has adopted a set of activity and workspace definitions in its working and reporting, based on previous work within the LLDC area, as well as commonly adopted definitions within economic and creative sector research:

Creative sector businesses

The following activities have been captured as ‘creative sector’ businesses, using the standard DCMS definition of creative industries:

1. Advertising & marketing
2. Architecture
3. Crafts
4. Design: Product, graphic & fashion design
5. Film, TV, video and fashion design
6. IT, software and computer services
7. Publishing
8. Museums, galleries & libraries
9. Music, performing & visual arts
10. Multiple activity/Managed workspace

Collective workspaces

Given the LLDC’s particular legacy and current provision of collective and shared workspaces, the study has worked to consider how to treat these spaces for the purposes of the business survey and how to ensure the valuable contribution they make to the area’s economy is captured.

1. Artist studios: each artists’ studio complex is counted as one business (the workspace provider) with multiple occupants (determined by the number of artists working from that site). This consistent approach to artists’ studios captures each studio building as a business, but one which is dense in its workspace capacity. This is to reflect the fact that not every individual studio is necessarily a ‘business’ (in terms of primary place of work or commercial output) but that artist studios are vital sites of work / artistic production in the area.
2. Live-work: each individual unit within a live-work complex is counted as one business. By using units as a proxy for businesses, this approach

captures how these buildings provide valuable workspaces (evidenced through observational research and previous studies), even though the consistency of these businesses can be relatively fluid. This approach also accounts for the fact that some units host multiple businesses on site and others which host few (or ‘part-time’) businesses based in that unit. This approach has only been applied to ‘historic’ live-work complexes like the Peanut Factory and Oslo House, while contemporary live-work units like Iron Works and Omega Works are treated as primarily residential in their nature given the known conversion rates to residential-only use.

3. Co-working spaces (workspaces, typically desks, available for short-term or temporary hire from a provider): each co-working space is counted as one business (the workspace provider) with multiple occupants (based on how many people make use of that workspace on an average day). By using the occupants rather than business count as a measure of workspace capacity, this approach accounts for the fact that co-working spaces are typically used by a range of tenants who may or may not be on site every day and who may be carrying out work for their own businesses, but equally might be carrying out work activities for a business that has its permanent base elsewhere.

Workspace typologies

The following workspace categories have been used to define and map workspaces in the LLDC area. These categories refer to spatial characteristics (access, scale, servicing), rather than activity. It is possible, for example, for food & drink uses to be recorded in re-purposed industrial spaces.

Workspace type	Definition
Large industrial space	>500m ² , double ceiling height (6-8m), loading bay, typical provision on ground floor

Workspace type	Definition
Small industrial space	<500m ² , higher ceiling (4.5-8m), loading bay, typical provision on ground floor
Workshop / studio space	Light industrial space, with higher ceiling preferred (3.5m), provision possible on any floor.
Large office space	>500m ² , lower ceiling (2.9 - 4.4m), provision possible on any floor
Small office space	<500m ² , lower ceiling (2.9 - 4.4m), provision possible on any floor
Retail space	Typically accommodating A1 uses, typically on ground or first floor with street-frontage
Assembly space	Spaces accommodating public or group gatherings, typically purpose-built and related to leisure uses
Yard space	Yard space used for the primary operations of a business, typically with a small or no ancillary building required

Business activities

The following activity categories and associated SIC code grouping have been used to define and map economic sectors:

Activity group	Associated SIC codes
Manufacturing: food & drink	101 - 120; 562
Manufacturing: textiles	131 - 152

Activity group	Associated SIC codes
Manufacturing: printing	181 - 182
Manufacturing: other	161 - 172; 191 - 332
Utilities & waste	351 - 353; 361 - 390
Construction	411 - 439
Vehicle sale & repair	451
Wholesale: construction	466 - 467
Wholesale: other	461 - 465; 469
Transport & storage	491 - 532
Info & communication: sound & video	591 - 592; 601 - 602
Info & communication: other	581, 611 - 620
Services: financial & legal	641 - 663, 681 - 683, 691 - 702
Services: design & architecture	711 - 712, 731 - 732, 741
Services: other	721 - 722, 742 - 743, 794, 750, 771 - 829, 941 - 960
Education & health	851 - 889
Arts & culture	900 - 910
Restaurants & cafes	561
Night-time & drinking venues	563
Leisure	920 - 932

LLDC BUSINESS BASE

Overview of local economy

780 + businesses

300 artist studios

400 co-working desks

A combination of on-the-ground business surveying, observational work and engagement with workspace providers has captured around 650 businesses in the LLDC area. This total, in combination with an estimated minimum of 130 businesses based in select live-work units (as defined previously), suggests that there are at least 780 businesses in our survey area. Furthermore, the LLDC area is home to 300 artist studios and almost 400 co-working desks which host and support a range of individual non-commercial artistic activities and start-up and SME enterprises.

Ongoing development and investment across the LLDC area is continuing to transform the economy and employment landscape in this part of London. A diverse mix of economic activity is present as it was three years ago, as illustrated by the 2014 Local Economy Study Part A Business Survey. Through this period, there has been churn of both workspace and their resident businesses whilst start-ups and newcomers to the area have arrived from different parts of central London, finding new opportunities. Today all venues from the 2012 Games are now open in their legacy forms. Economic activity, neighbourhoods and community can be seen to be solidifying around these focal points in the Queen Elizabeth Olympic Park, whilst other businesses on the borders of the park have adjusted and in some places, capitalised on this new dynamic.

Business activity

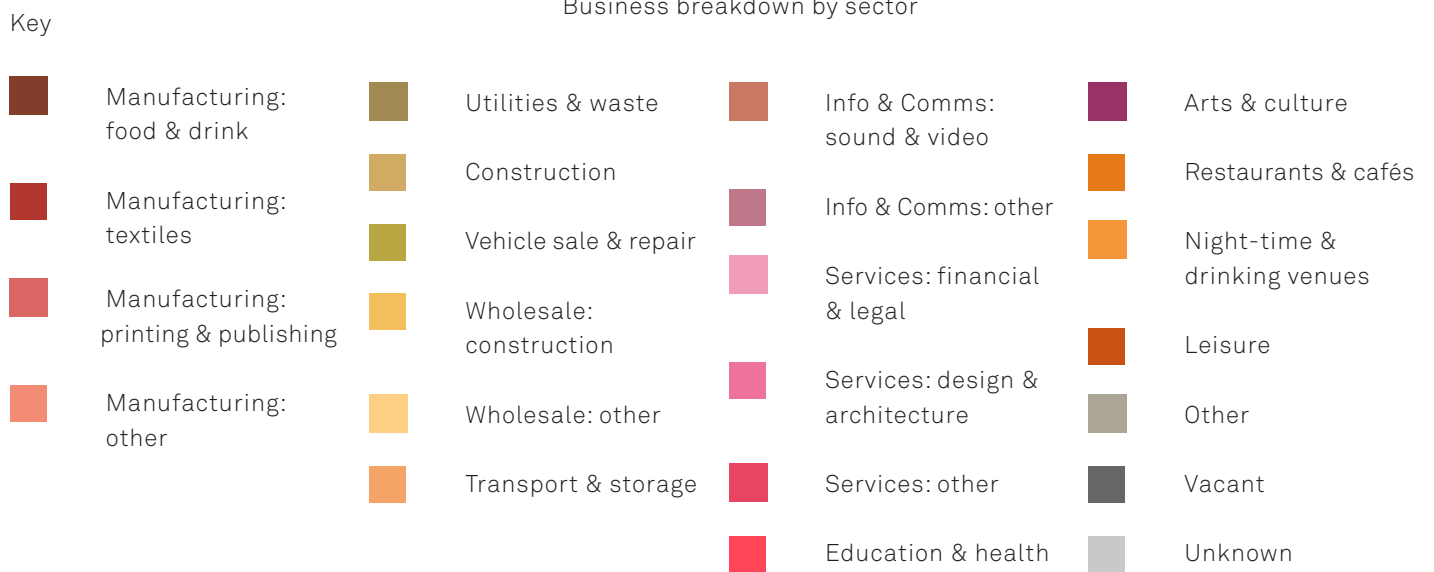
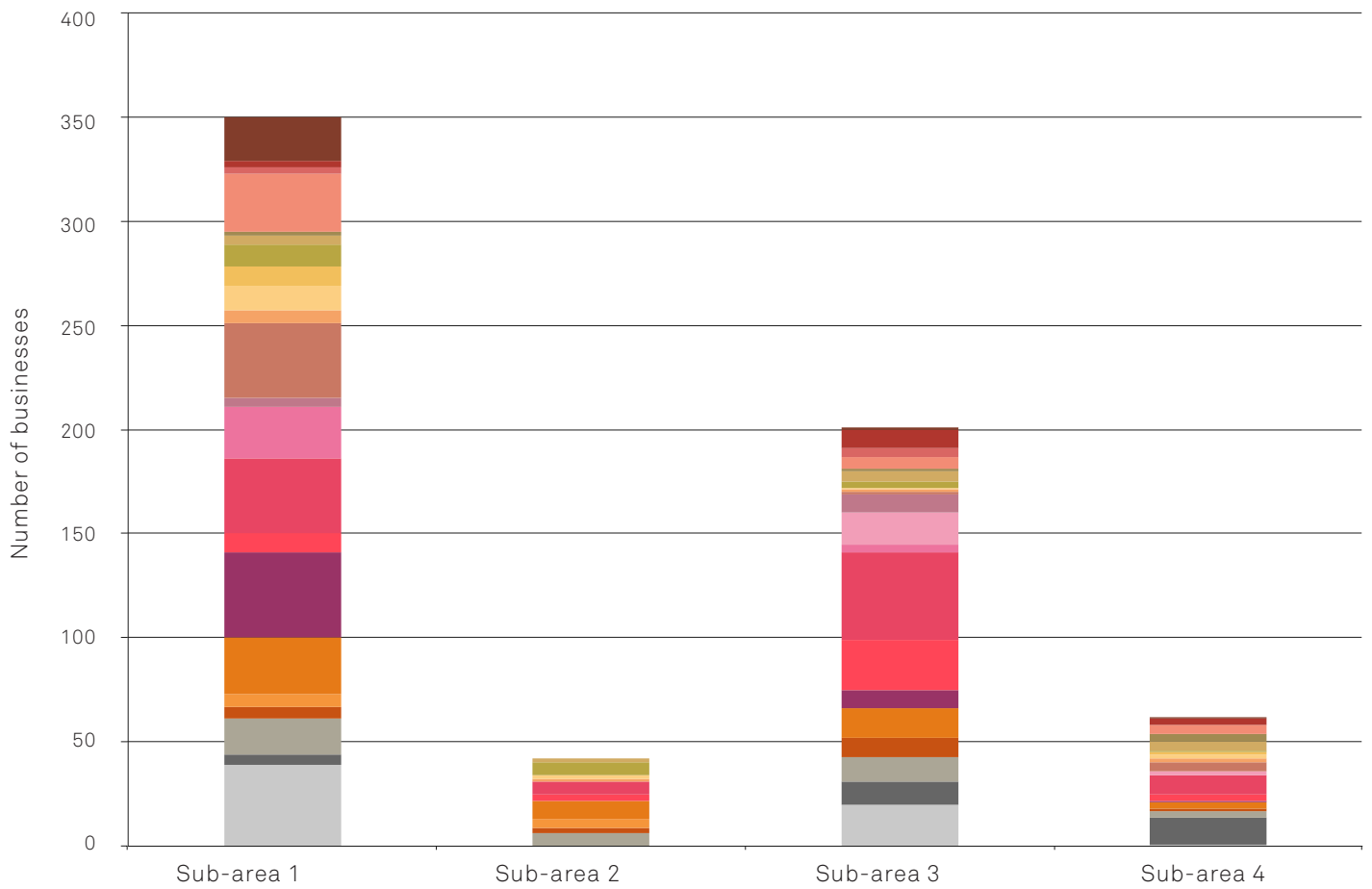
No one business sector has a monopoly across the LLDC area, but 'Other' services, marketing agencies or a cleaning companies for example, have been identified as the most common single sector activity. A mix of manufacturing, arts & culture and sound & video service businesses are also important local sectors, although this varies across sub-areas (see opposite). 21% of businesses were identified as

being engaged in creative activity. Once the area's live-work spaces and associated assumptions on the creative activity within these premises are factored in, this climbs to a third of the LLDC's total business base. The area continues to host one of the largest concentrations of artists' studios in London, with over 300 studios within the area.

The distribution of these businesses is uneven across the area and are instead focused along the Eastern edges of the LLDC area, from Hackney Wick down to Bromley-by-Bow, indicating how important the creative industries are to the character of particular parts of the LLDC area. Wider trends of de-industrialisation and rising workspace rents reported by survey respondents and seen across London are no less present across the LLDC area in 2017. As in 2014, in the context of the ongoing redevelopment of previously industrial land in areas such as Hackney Wick and Sugar House Lane, activities in manufacturing, industrial and creative business still remain a significant driver of the local economy. However, there are examples where even some of the most entrepreneurial and successful business still report pessimistically on their long-term ability to stay in the area, in the context of such rapid and dynamic development.

In the context of ongoing development and change, early successes can be seen in projects such as the International Quarter London, where significant employers are being attracted to locate to the area in a way that rapidly raises the local employment density. The boost this gives to wider businesses providing secondary services, such a food and leisure activities can be seen in the growth and emergence of these sectors in areas where they were not previously present. The expansion of physical infrastructures such as bridges and bus routes crossing the Lea river and canal appears to have helped business in neighbouring areas to capitalise on this same dynamic.

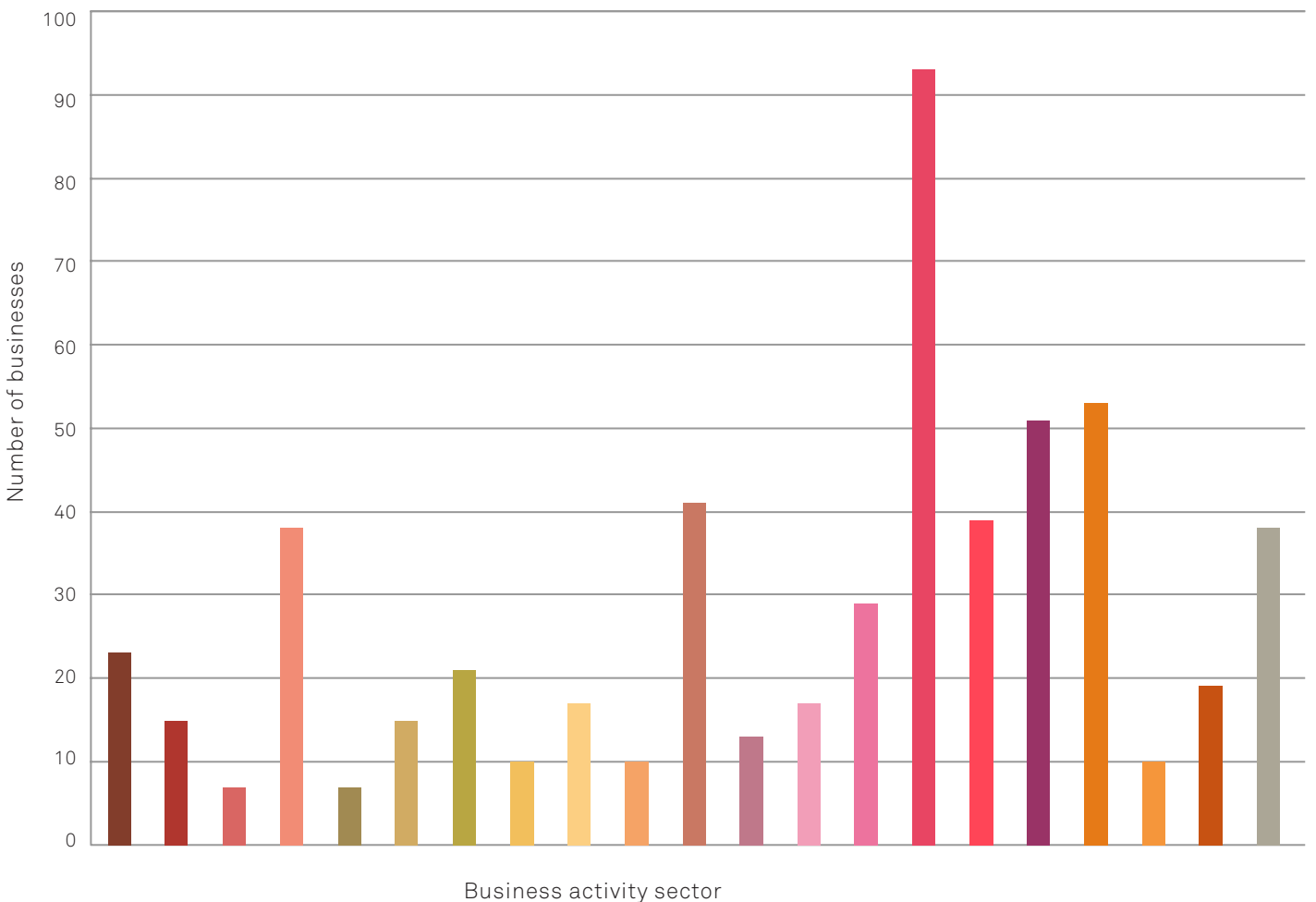
Analysis of businesses numbers and floorspace helps to illustrate how different sectors make use of workspace across the LLDC area. As seen across the graphs below, services are the most common business

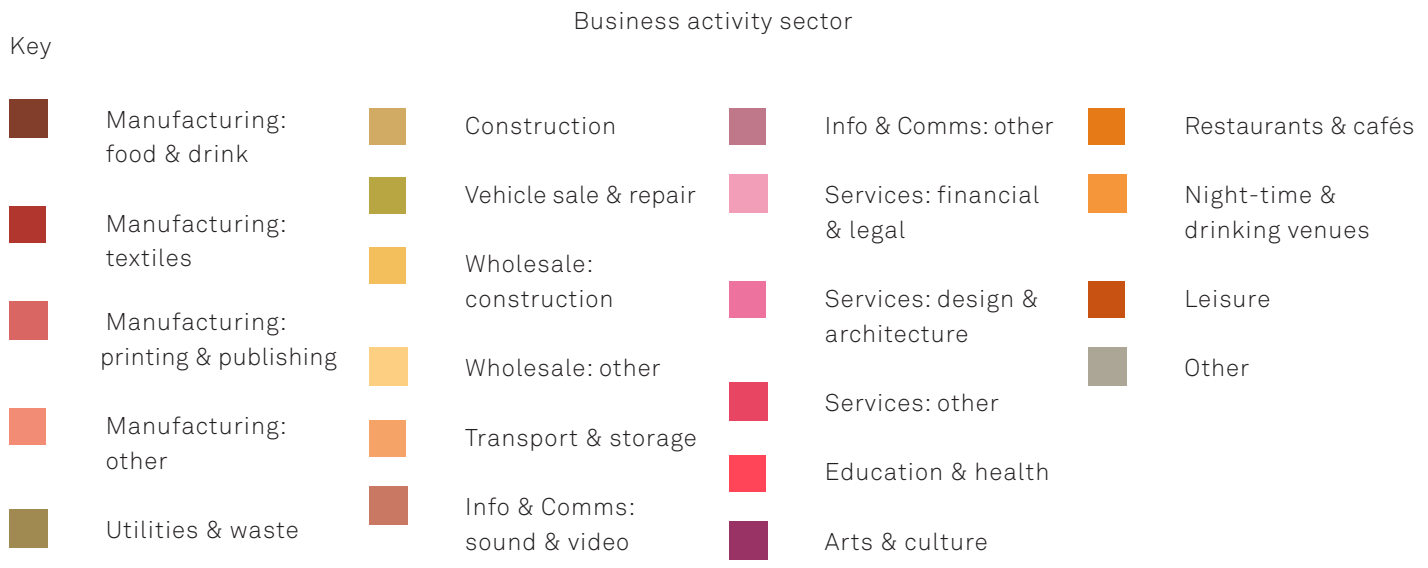
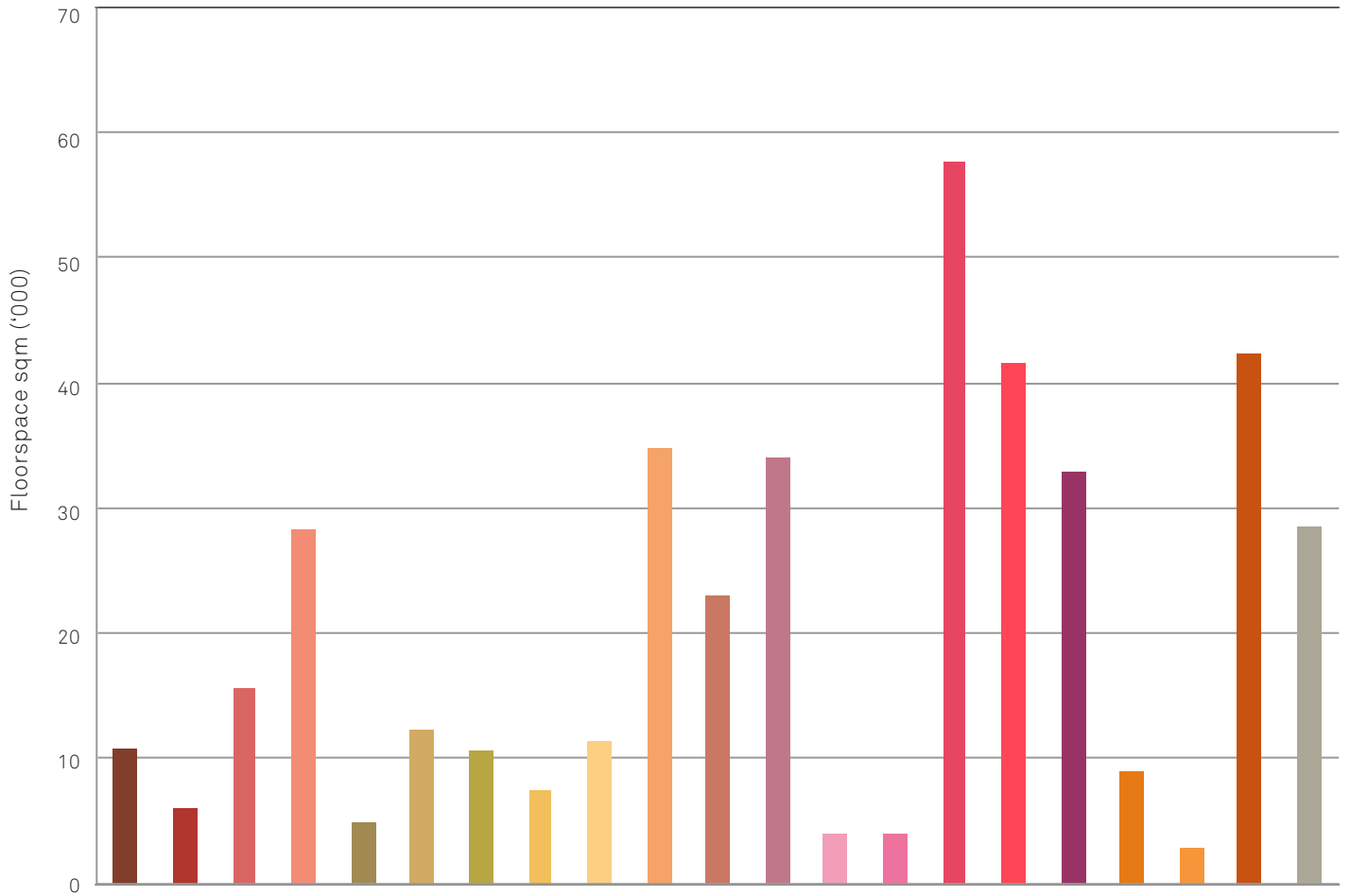


activity sector across the area, and 'other' services, which typically correlate with office-based activity, occupy the most floorspace across the LLDC area.

Wholesale, construction and transport & storage activities can be seen to occupy high proportions of floorspace relative to their occurrence in the area - reflective of the spatial requirements of these businesses. Food & drink businesses occupy smaller proportions of floorspace relative to how common they are across the LLDC area, reflective of the typically small, retail-type units they occupy. Leisure uses, conversely, occupy a high proportion of floorspace, reflective of the large-scale sport and event spaces which are integral to the LLDC area.

Retail businesses are not the core focus of this study given the accompanying Town Centre & Retail Needs Study. Westfield Stratford City is not included in this survey and high-street type retail has been captured and is categorised as 'other' for the purposes of this study. Wholesale and construction-related retail like trade counters and tool hire are included as standalone categories given the types of workspace they typically occupy (industrial-type units with associated yard spaces).





Workspace

Workspace typologies across the LLDC area continue to be defined by the distinct characteristics of the different sub-areas. As detailed further in the emerging employment trends section of this report, the particular mix of industrial building stock is particularly suitable for multiple forms of re-use. Workshops have been identified as being the most common form of workspace, supporting 177 businesses. Small and large industrial spaces support another 192 businesses between them. Every activity sector is represented within one or more of these typologies. Retail, office and other workspace typologies do not attract a similarly diverse and resilient range of businesses.

While workshop spaces continue to be the most common workspace typology across the LLDC area, large industrial spaces occupy the largest volume of floorspace. This is reflective of the operational, storage and servicing requirements of many industrial occupiers which typically require larger floor plates. Workshop spaces, in comparison, occupy relatively little floorspace across the businesses surveyed, but provide numerous workspaces to SME and light industrial businesses. The combination of these typologies and floorspace offers is what sustains the area's business base diversity. The LLDC area has seen a number of new workshop units delivered in the last three years through the sub-division of existing industrial building stock. Typically these refurbishments have been undertaken by workspace providers who then rent out spaces to a mix of occupiers.

Particular concentrations of workspace are present in certain sub-areas. Around two thirds of the workspace in Hackney Wick and Fish Island is either workshop or small industrial space. Whilst over half of the businesses in North Stratford and Eton Manor are occupying retail space. Here, these are predominantly spaces that make up the street-frontage to the East Village residential developments. Assembly spaces are present in both bespoke and informal contexts. With the exception of the London Stadium, all venues from the 2012

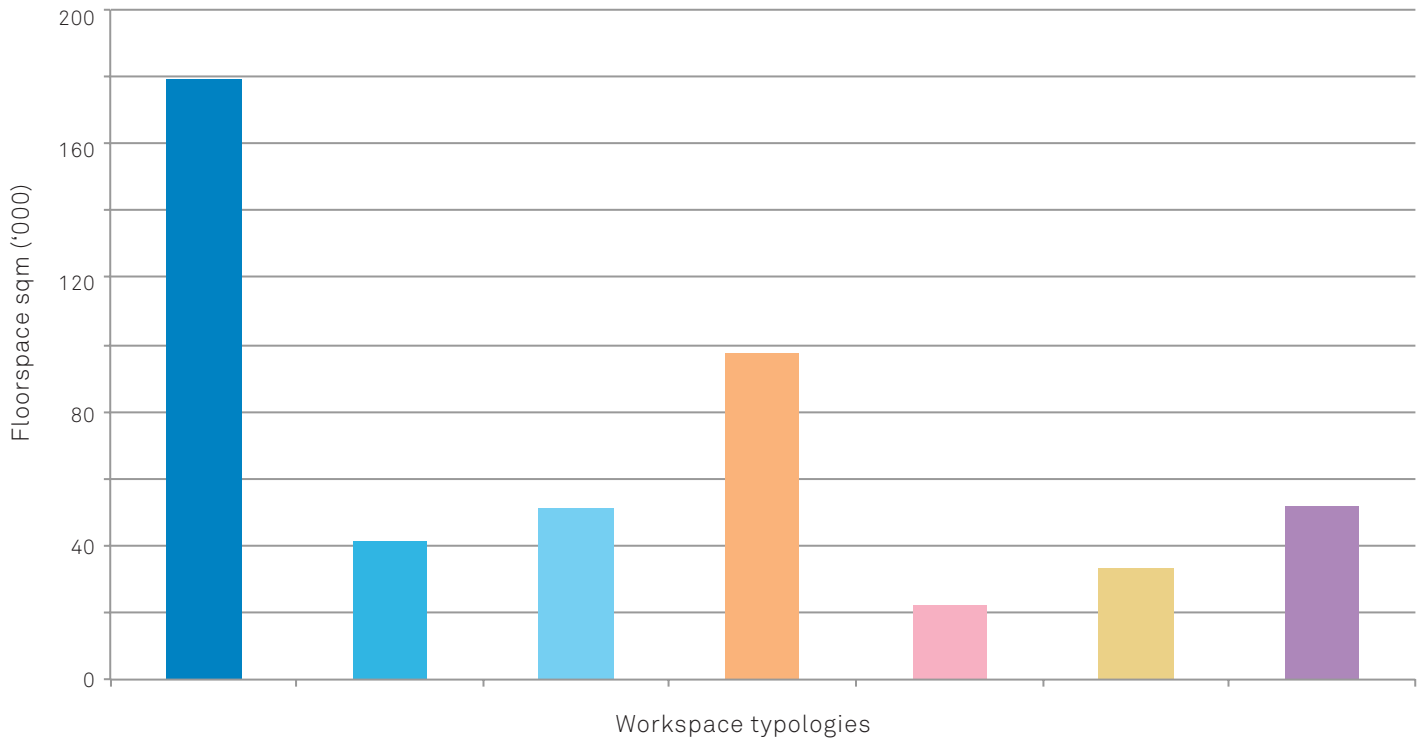
Games are open to the public every day of the week and have a relevant full-time workforce. These assembly spaces provide a significant amenity to the area. Industrial spaces provide assembly space in the form of nightclubs and event spaces. Here businesses build their offer on an informal aesthetic that would not be replicable anywhere else in the area.

Vacancy

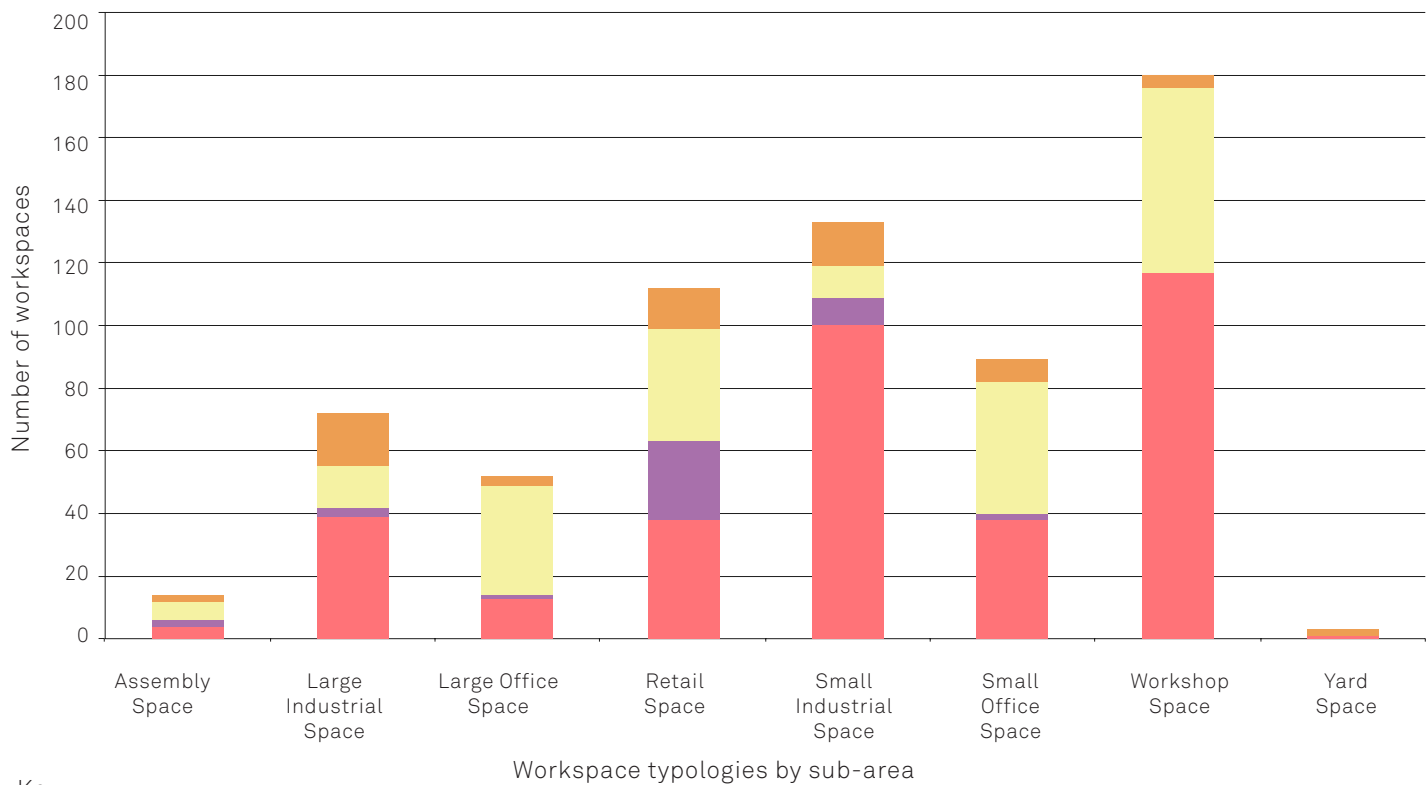
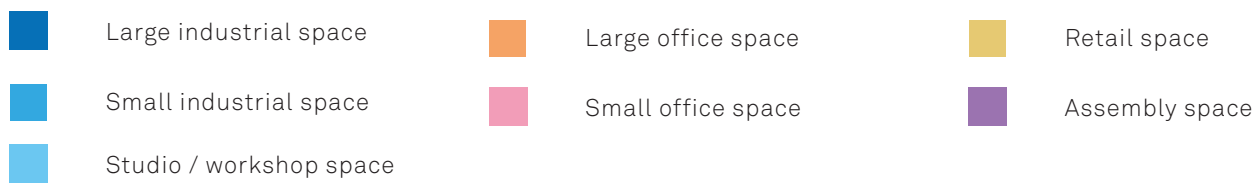
Vacancy of workspace is minimal across the LLDC area. Of all those premises surveyed, only 5% were recorded as vacant. There is little evidence of workspaces not being able to find tenants when on the market, which is reflective of the wider property market in London.

Large industrial spaces (>500m²) are the most common vacant workspace typology across the LLDC area, followed by retail spaces. Typically, the reasons for vacancy are split along these lines - industrial spaces are vacant, but not available to let, in anticipation of redevelopment, while retail spaces are vacant and available to let. Vacancy of retail units can be understood both in relation to how new some of these units are to the market, having recently been completed, as well as in relation to the suitability of some of the spaces which have not appealed to potential tenants (e.g. size, fit out, relationship to the high street). This distinction can be well observed in Sub Area 4. Industrial premises in Marshgate Lane Business Park and Cook's Lane are currently vacant in anticipation of forthcoming Bellway and Workspace Group schemes. The area also hosts vacant A1 units delivered on the ground floor of new residential developments (along Hancock Road and at several sites along the High Street, for example). In Sub Area 1, a cluster of small industrial units along Wallis Road are currently vacant. While some of these are available to rent, others have been recently vacated by tenants under landlord orders in anticipation of development.

There is very little recorded vacancy of either workshop or large office spaces. This is reflective of the fact that workshop spaces are well-used and in



Key



Key



demand in the area, and that large office spaces are typically pre-let or purpose-built for occupiers. A consideration of workspace typologies used by different activity sectors, shown opposite, illustrates the suitability of different types of workspace and provides some indication of the types of workspace that should be delivered to support these sectors growing in the LLDC area.

Typically, manufacturing, transport and utility activities are operating from industrial units. The survey work also illustrates how workshop spaces are important workspace types for textile and publishing activities, as well as sound and video activities. The specification of these workshop spaces (typically a light industrial space with higher ceilings up to 3.5m) allow for a wider range of activities than office spaces do - including the use and storage of filming, photographic, sewing and printing equipment.

Most food and drink businesses are currently operating from 'retail-type' spaces. These spaces are typically street-facing, typically on the ground floor and have minimal servicing requirements beyond spaces for deliveries. Additionally, there is an important sub-set of food and drink businesses operating from small industrial units, typically in the Hackney Wick & Fish Island area. These units typically have floor plate of less than 500m², higher ceilings (4.5m - 8m) and loading bays.

Some food and drink businesses are operating from workshop and small office-type spaces. Typically these businesses are using these spaces for office or ancillary functions like storage, while delivering their offer elsewhere (e.g. street food businesses serving Shoreditch street food markets)

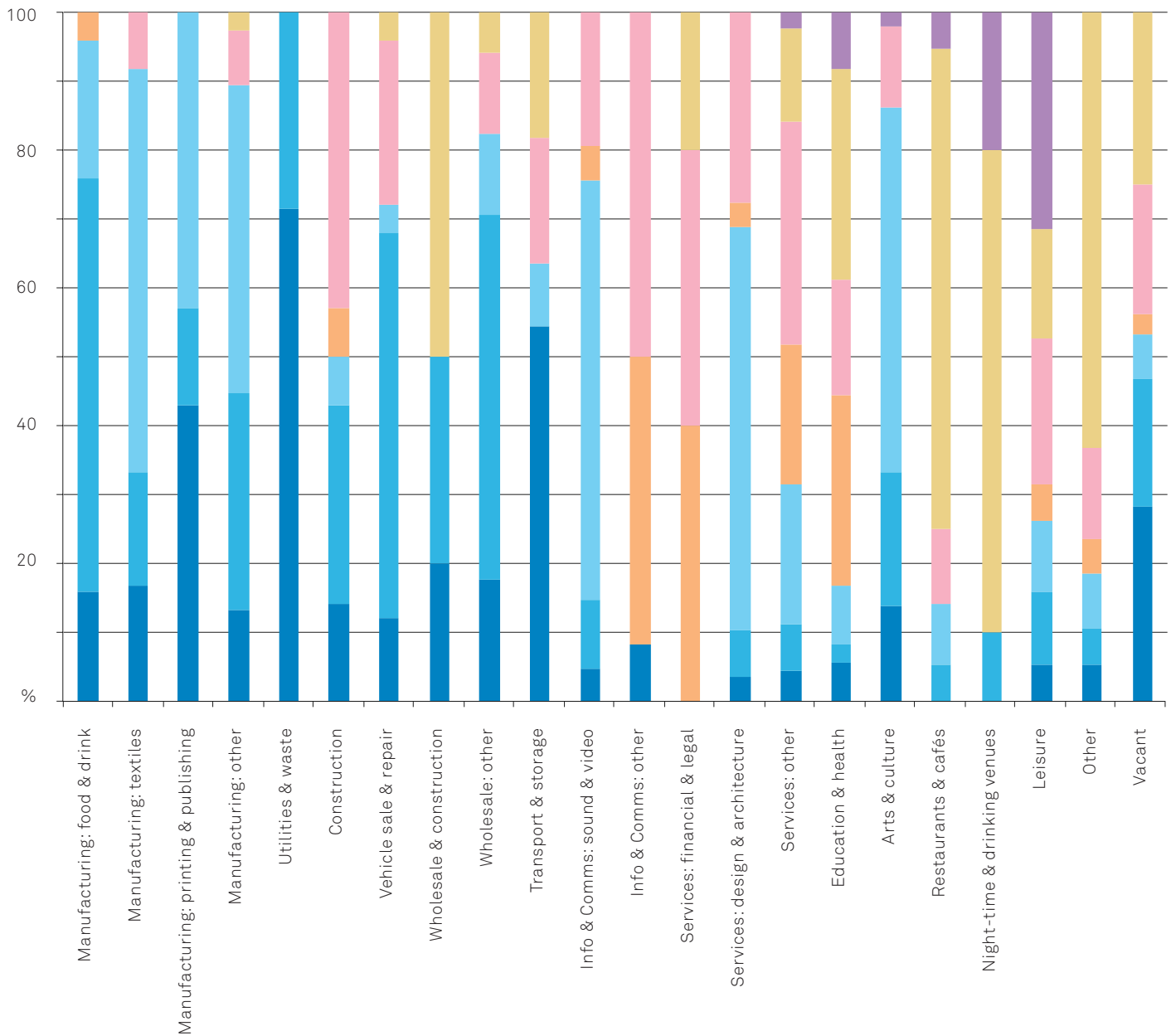
Most leisure activities are operating from assembly spaces. These spaces are typically purpose-built to accommodate leisure activities and generic workspace guidance is limited in this regard. There are, however, some examples of industrial and workshop spaces being used for leisure activities, including 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 units footprints (with longer building spans) are some of spatial features which have allowed these spaces to be re-purposed for leisure activities.

There are also leisure-related businesses who have their office and operational functions in the area. These businesses are 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.

Almost half of night-time activities are currently taking place in retail-type spaces (street-facing, ground floor units) 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 manufacturing, construction, wholesale and public services (e.g. Royal Mail). Improved street lighting, signage, way-finding measures and night-time transport options 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 which do not conflict with their night-time operations (in terms of noise and servicing) as residential units might. Noise mitigation measures and licensing agreements will be increasingly important as the LLDC area delivers more residential and employment space through masterplans and site-specific developments.



Key

- Large industrial space
- Small industrial space
- Studio / workshop space
- Large office space
- Small office space
- Retail space
- Assembly space

Employment densities

The extensive geography of the LLDC area, in combination with the scale of ongoing construction, makes for a varying landscape of employment densities. Employment figures based on the surveying work illustrate exactly how different employment spaces are being occupied. The density mapping included in this report is illustrative of how different workspaces and sectors are delivering employment density, and in particular illustrates the value of managed workspace, workshop units and artists' studios in delivering dense sites of employment.

The density mapping provided in the following pages serves as a useful guide in understanding exactly how certain locations, workspace typologies and existing workspace providers are delivering employment to the LLDC area. Buildings have been mapped in categories comparable to HCA guidance, which allows for a degree of comparability when considering the assumed density of a site based on its use class, against the density of the current occupier as recorded in this work.

Relevant HCA employment categories include:

- B1a offices <15sqm / employee
- B1b & B1c: 40-60 sqm / employee
- B8: 70 - 90 sqm / employee
- Studio spaces: 20-40 sqm / employee
- Co-working: 10-15 sqm / employee
- Managed workspace: 12-47 sqm / employee

Based on the surveyed employment data and associated employment estimates, the LLDC's designated industrial sites are operating at varying levels of employment density in comparison to the London-wide employment density average (69 employees / ha). The Here East (Hackney Wick) SIL site, is estimated to be operating at a density of 280 employees / ha, well above the London average for industrial land. This is reflective of the re-purposing of the built stock for a range of employment activities which extend beyond industrial activities, including educational, broadcasting and food and drink businesses. Similarly, the Fish Island South (including Bow Midland West Rail Site) SIL site is

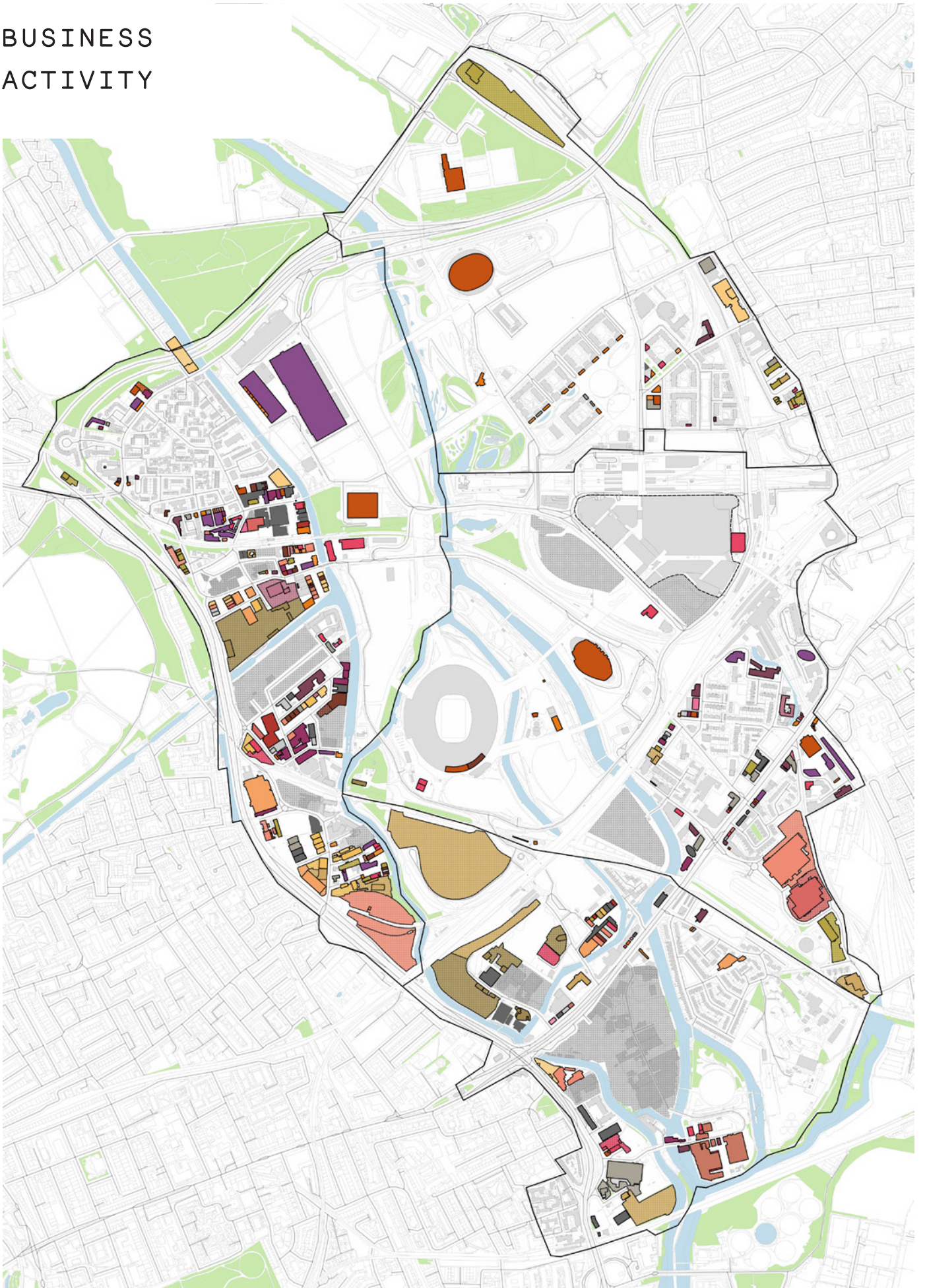
currently operating at around 95 employees / ha. Rather than being delivered through a strategic, single workspace provider as at Here East, density in this Fish Island site is being delivered through multiple managed workspace sites, a concentration of workshop spaces and service and creative sector-based activities which are correlated with higher employment densities.

The Bow Goods Yard East SIL site, however, is operating at a density of less than ten employees/ ha, well below the London-wide average. All of the LLDC area's LSIS sites, apart from the EGC site on Eastway, are also currently operating at densities lower than the London-wide average.


























This indicates that there is capacity for increasing employment densities on these sites through industrial intensification schemes. Similarly, the area's OIL sites are currently operating a low employment densities (30 employees /ha on the Wick Lane OIL site and only 7 employees / ha on the Cook's Road OIL site). Delivery of new residential and workspace schemes are currently on site in both OIL locations, expected to increase both area's employment totals.

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BUSINESS ACTIVITY

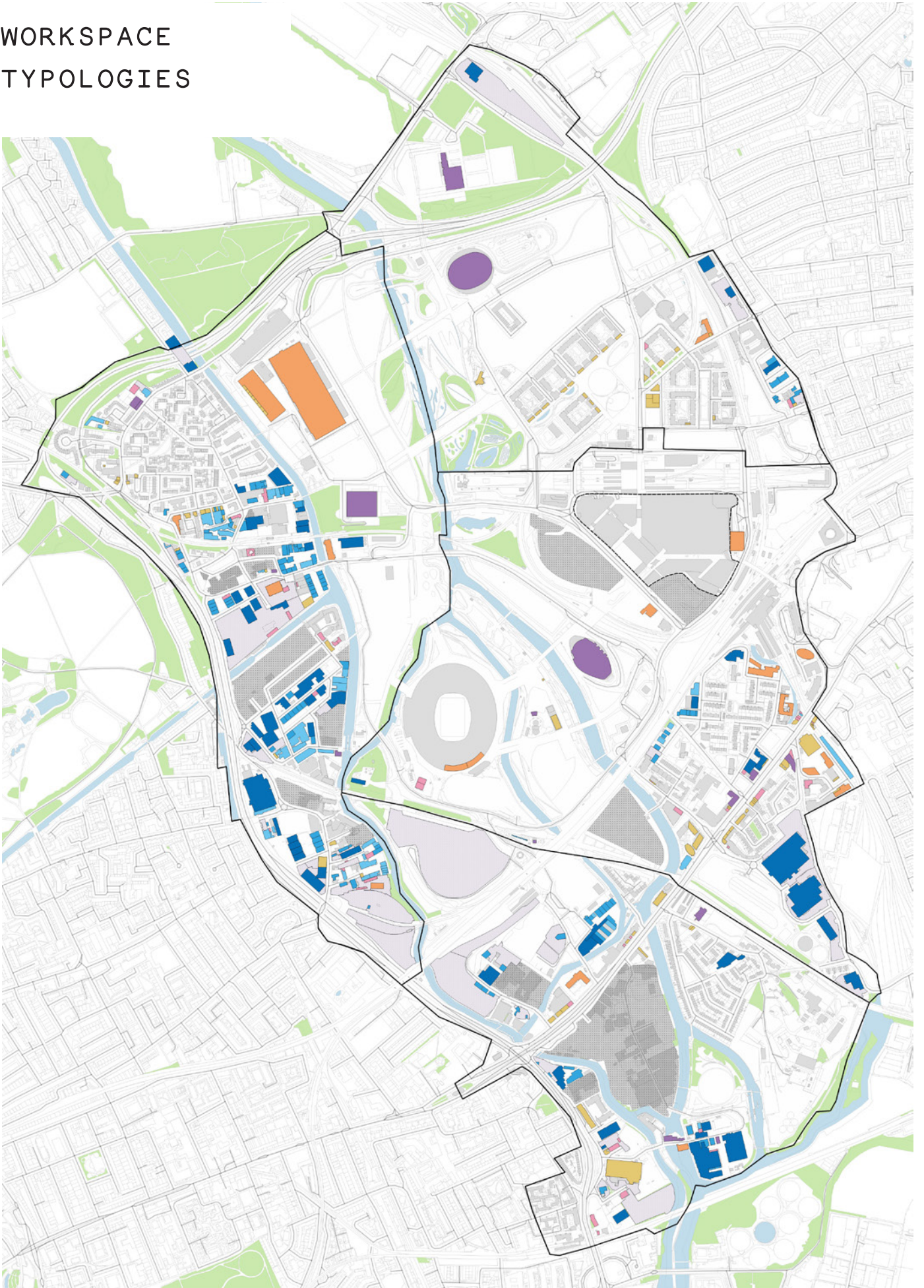


Key










	Manufacturing: food & drink		Vehicle sale & repair		Services: design & architecture		Mixed tenants
	Manufacturing: textiles		Wholesale: construction		Services: other		Other
	Manufacturing: printing & publishing		Wholesale: other		Education & health		Vacant
	Manufacturing: other		Transport & storage		Arts & culture		Unknown
	Utilities & waste		Info & Comms: sound & video		Restaurants & cafés		Not considered as part of this study
	Construction		Info & Comms: other		Night-time & drinking venues		
			Services: financial & legal		Leisure		

--- Westfield Stratford City not included in the scope of this study.

WORKSPACE TYPOLOGIES

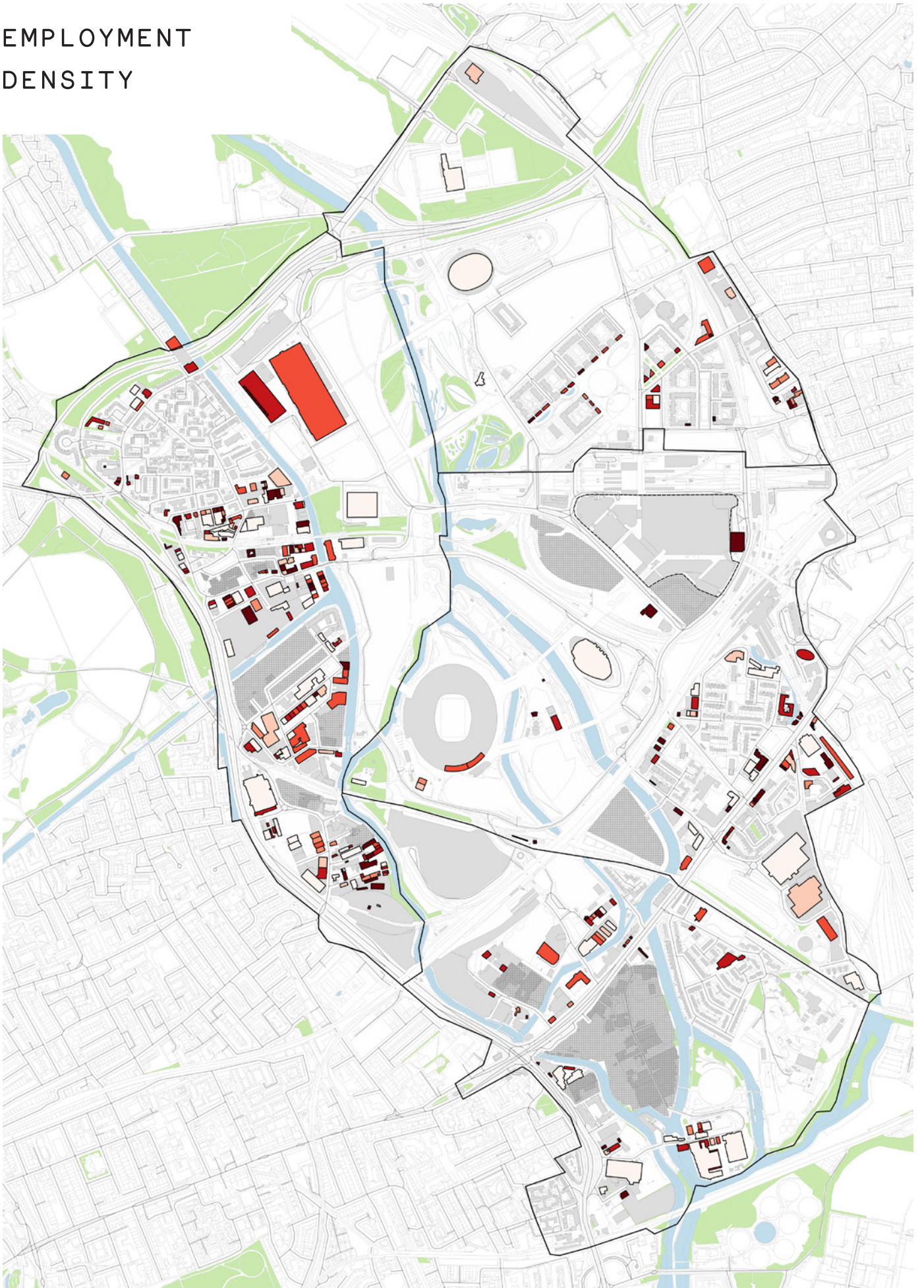


Key

	Large industrial space		Large office space		Assembly space
	Small industrial space		Small office space		Yard space
	Studio / workshop space		Retail space		Under construction







--- Westfield Stratford City not included in the scope of this study.

EMPLOYMENT DENSITY



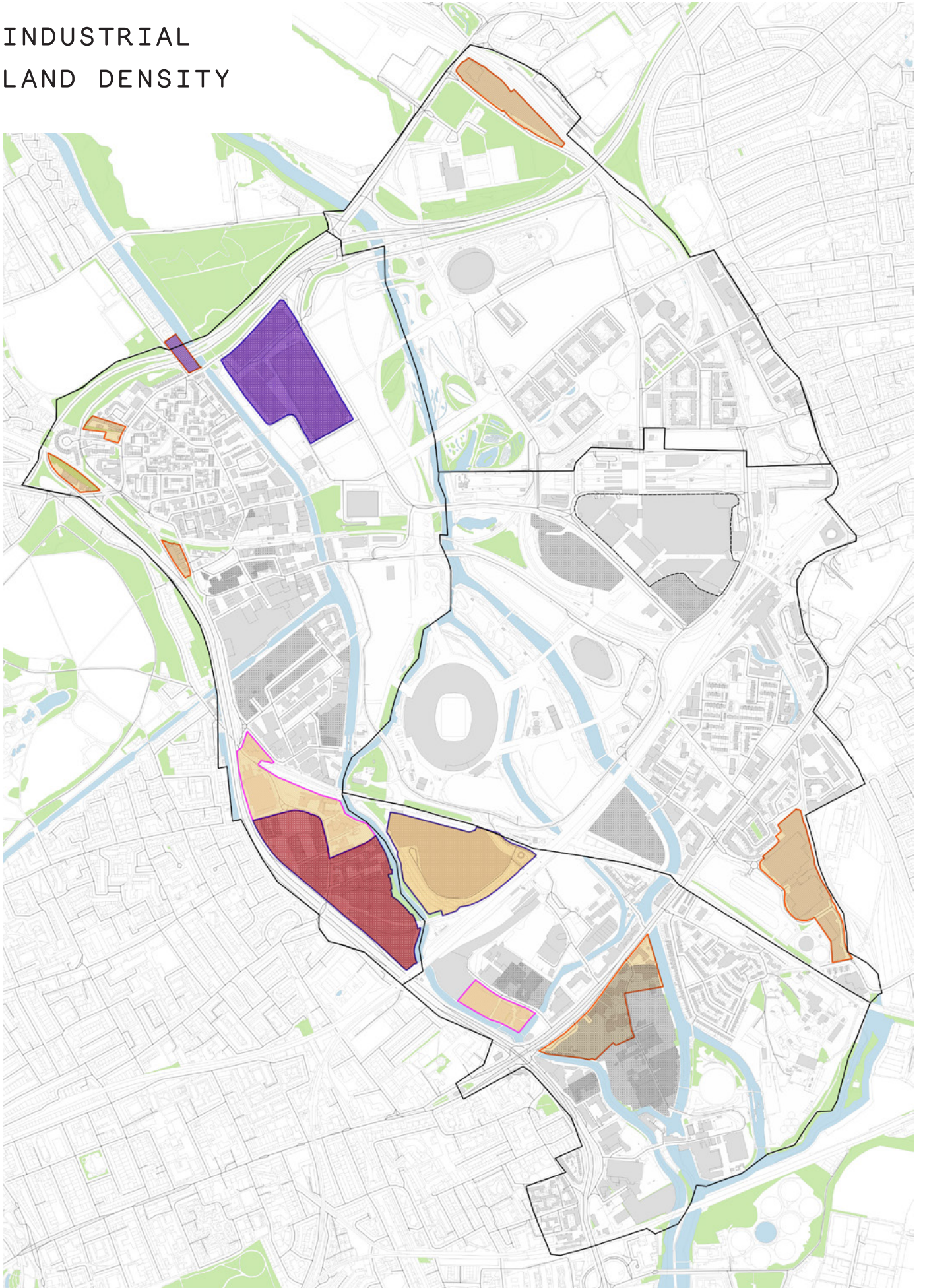
Key

Building density






	<20sqm / employee
	20 - 40 sqm / employee
	40 - 60 sqm / employee
	60 - 80 sqm / employee
	80 - 100 sqm / employee
	100 + sqm / employee

--- Westfield Stratford City not included in the scope of this study.

INDUSTRIAL LAND DENSITY



Key

	0 - 69 employees / ha (lower than London-wide average)		Strategic Industrial Location (SIL)
	69 - 138 employees / ha		Locally Significant Industrial Site (LSIS)
	138 + employees / ha		Other Industrial Land (OIL)
	Sites under construction		

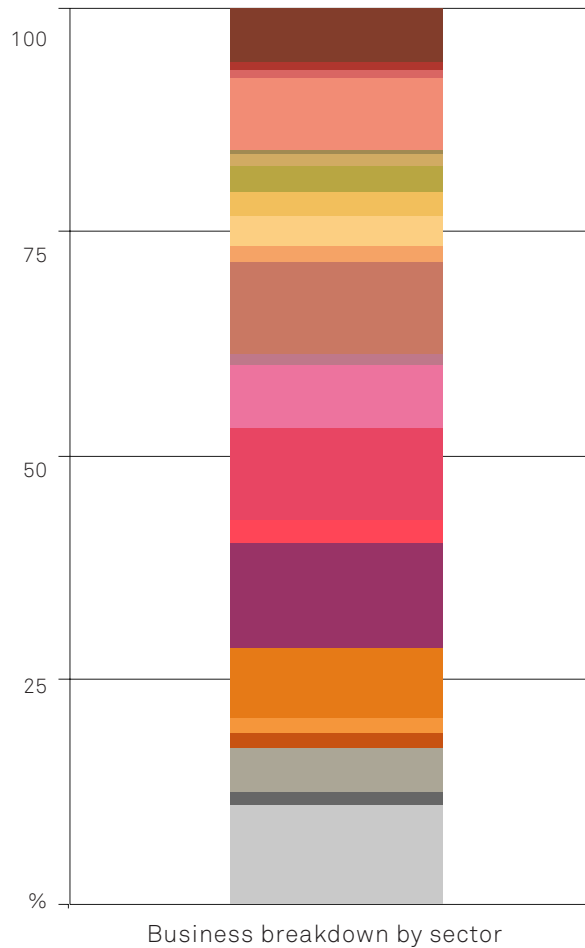
--- Westfield Stratford City not included in the scope of this study.

1: Hackney Wick & Fish Island

Business activity

The Hackney Wick and Fish Island sub-area continues to host the highest concentration businesses in the LLDC area. The 350 businesses identified make up just over half of all businesses resident in the LLDC area at 53%. The sub-area has the greatest diversity of businesses. Every sector is represented, with the sole exception of financial and legal services. No one sector is disproportionately represented, however there are particular concentrations of businesses in arts and culture sector (12%) and in sound and video production (10%). Sound and video production services appear to have grown in their prominence in the area since 2014, surpassing the number of design and architecture service businesses which were previously more prominent. All type of manufacturing sub-sectors are still operational in the area, with the food & drink and 'other', manufacturing sub-sectors, including furniture, framers and set builders, particularly notable.

The area continues to host the largest number and proportion of businesses engaged in creative activity, with 110 active businesses - 90 more than any other sub-area.



Key

- | | | | |
|--|---|---|--|
| Manufacturing: food & drink | Construction | Info & Comms: other | Restaurants & cafés |
| Manufacturing: textiles | Vehicle sale & repair | Services: financial & legal | Night-time & drinking venues |
| Manufacturing: printing & publishing | Wholesale: construction | Services: design & architecture | Leisure |
| Manufacturing: other | Wholesale: other | Services: other | Other |
| Utilities & waste | Transport & storage | Education & health | Vacant |
| | Info & Comms: sound & video | Arts & culture | Unknown |
| | | | Mixed tenants |



While Hackney Wick and Fish Island has the largest number of business operating during the night-time economy, it has the lowest proportion of all the sub-areas at 14%. Across the sub-area, this is made up of both social night-time economy activities such as bars and restaurants, as well as manufacturing and logistics operations that operate through the night. As discussed in further detail later in this report, the mixture of night-time economy activity is exemplified in food and beverage production businesses that offer restaurant, bar and event activities from the same or nearby locations.

Employment

Over 5,400 individuals are estimated to be working across this sub-area, with the average business employing 12 people. It continues to have the highest average employment density across the LLDC area, including the Here East (Hackney Wick) SIL area which is operating at an employment density well beyond the London average for industrial land. Most businesses reported few problems in recruiting skilled people. The diversity of activity in Hackney Wick and Fish Island and the proximity to the wider area of central-east London was often highlighted as what was seen as attractors to people working in the area. Only older traditional trades, such as vehicle repair and maintenance reported problems recruiting. Where reported, the average business in this sub-area has been at their current location for 5.7 years. This appears to be reflective of a dichotomy of businesses, where older established manufacturing businesses have been able to retain their place, and smaller start-ups and creative industries make use of smaller shorter-term accommodation. This sub-area also has a large proportion of the shared/managed workspace and artists' studios present in the LLDC area.

Workspace

Nearly two thirds of the workspace in Hackney Wick and Fish Island is either workshop or small industrial space. Historic large industrial space across the sub-area has typically been subdivided into smaller units. This trend has found

a contemporary interpretation with the Here East development which has re-purposed large-scale industrial space into a mix of office, workshop and studio spaces. This large building which acted as the media centre during the 2012 Games has been subdivided into retail, assembly, office and industrial space and both the large and small scale, reflective of the wider sub-area.

Ongoing construction and redevelopment across this sub-area is reported by businesses to be putting pressure on both occupancy and operation. For businesses that predict leaving the area within the year, around a third report the loss of their workspace as the cause. Disruption and pollution from construction was cited as being the biggest problem to businesses. Large blocks of space are left devoid of productive activity during construction periods, to the detriment of neighbouring businesses. Consented planning applications and recent LLDC workspace policies suggest that workspaces that are forthcoming will be of a similar scale to the current mix of workspaces typologies in the area. While LLDC policies and workspace guidance, like the 2015 LLDC Employment Space Study, do aim to enable existing businesses to remain in the area by re-providing employment floorspace in flexible and similar formats (particularly workshop / studio and small industrial spaces), existing occupants are sceptical.

Creative Industries

The 110 active business engaged in creative activity in this area operate across multiple sectors. Around a third are in sound and video activity, with another third being arts and culture lead. Information, communication, design, architecture and creative services are also present. Formal artists' studio provision provided by multiple operators including Space, Cell Projects, Arbeit/Arbyte and Stour Space provide 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. 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.



International start-up platform F6S operates out of a units in Queens Yard, alongside glass fitters, brewers, vehicle repair services, furniture makers, artists studios and a ceramics workshop.



New food and drink amenities on the canal front of the Here East building.



Photography studio space for hire, above recording studios and small coffee shop.

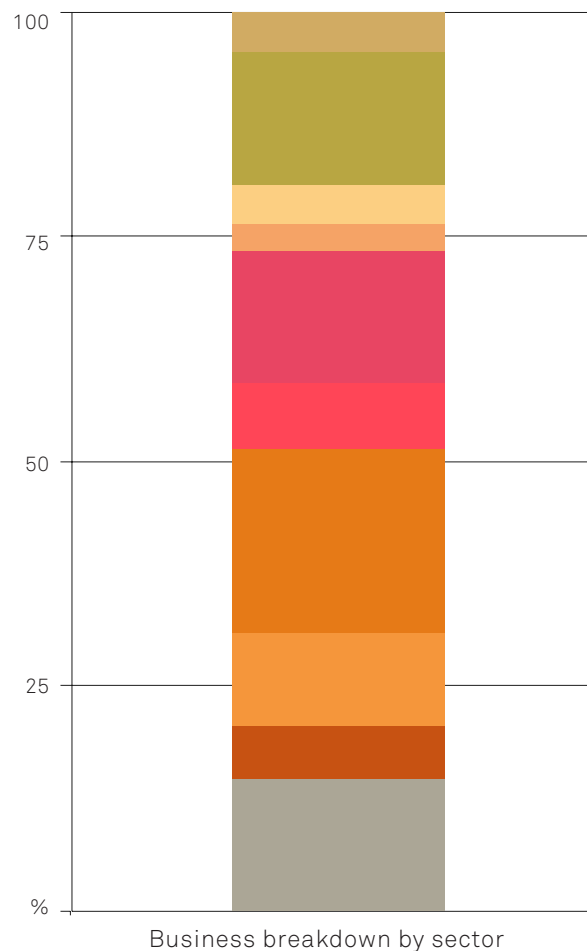
2: North Stratford & Eton Manor

Business activity

The 42 businesses identified in North Stratford and Eton Manor make up only 6% of businesses resident in the LLDC area. This is primarily made up of construction and vehicle repair businesses along the Leyton Road to the east of the sub-area, and restaurant, bar and event businesses now open within the East Village neighbourhood. No businesses were identified as engaged in creative activity.

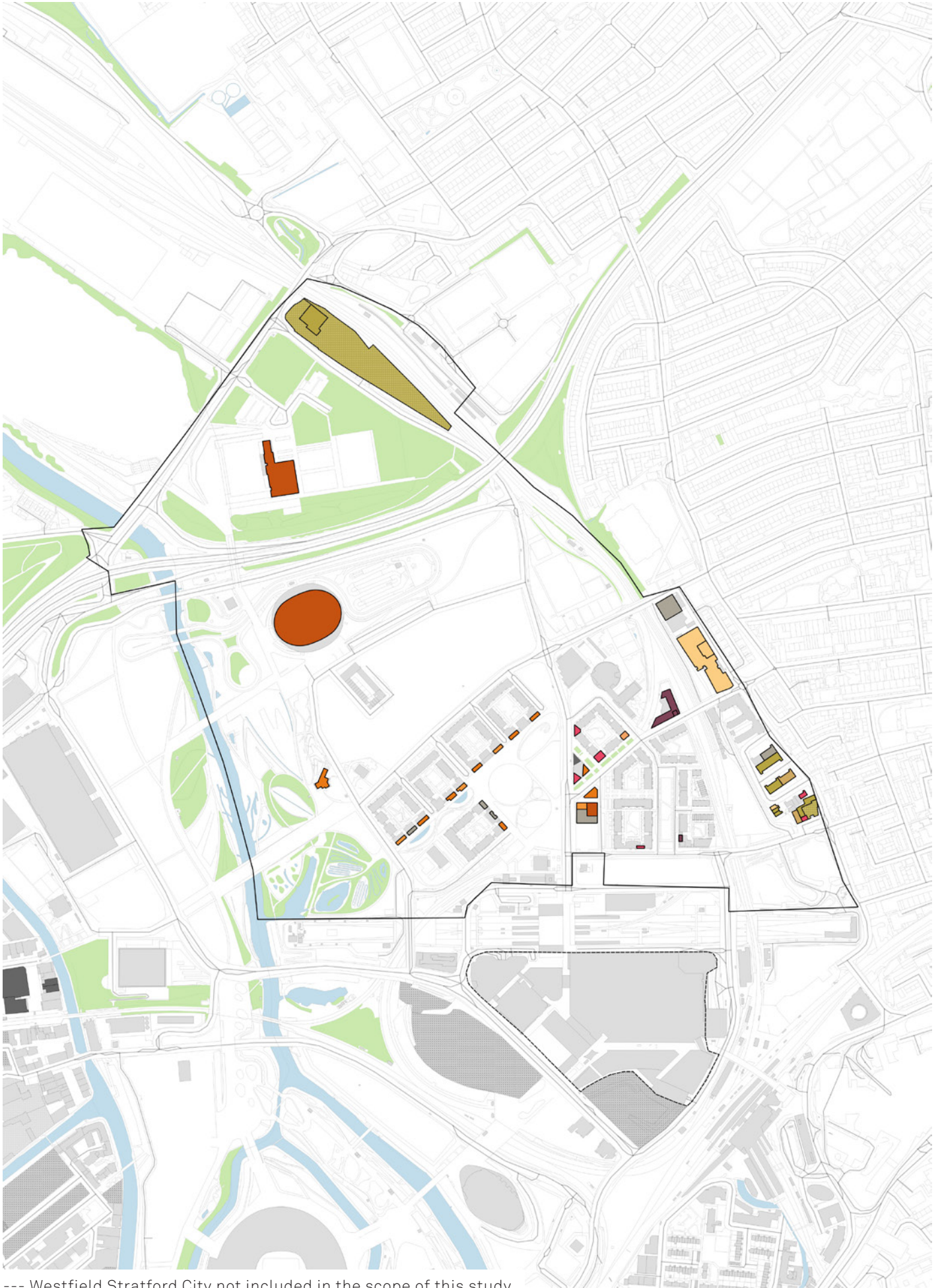
While still proportionally small in its business count, this sub-area has seen a considerable increase in the number of businesses operating in the area since 2014. New workspaces have typically been delivered as part of larger residential-led development projects or in associated amenity spaces.

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 leads to the sub-area having the largest proportion of business operating during the night-time economy, at 43%. In addition, the sporting facilities at the Velo Park and Hockey Centre operate into the evening and provide an additional amenity to the growing neighbourhood.



Key

 Manufacturing: food & drink	 Construction	 Info & Comms: other	 Restaurants & cafés
 Manufacturing: textiles	 Vehicle sale & repair	 Services: financial & legal	 Night-time & drinking venues
 Manufacturing: printing & publishing	 Wholesale: construction	 Services: design & architecture	 Leisure
 Manufacturing: other	 Wholesale: other	 Services: other	 Other
 Utilities & waste	 Transport & storage	 Education & health	 Vacant
	 Info & Comms: sound & video	 Arts & culture	 Unknown
			 Mixed tenants



--- Westfield Stratford City not included in the scope of this study.

Employment

Just under 500 (490) individuals are estimated to be working across the North Stratford and Eton Manor sub-area, with the average business employing 12 people. It has the lowest employment density across the LLDC area.

Where reported, the average business in this sub-area has been at their current location for 3.6 years. This is the shortest average period across the LLDC area, reflective of the number of new businesses that have opened in the East Village neighbourhood.

Workspace

The majority of businesses (60%) across the sub-area are occupying workspace classed as retail space. These are spaces that make up the street-frontage to residential developments. The workspaces along the Leyton Road site are mainly small industrial spaces.

The continuing construction and residential growth of this sub-area is facilitating the growth of businesses. Many businesses are dependent on the continued increase in local residents to patronise their business. Surveyed businesses report risks present in this progression not happening fast enough.

Creative Industries

No businesses were identified as engaged in creative activity. The type of workspace present does not appear to preclude this use in future.



Recently established amenity, health and leisure provisions around the new E20 neighbourhood.



Vehicle repair garages along Leyton Road.



Timbre Lodge cafe and community space in QEOP.

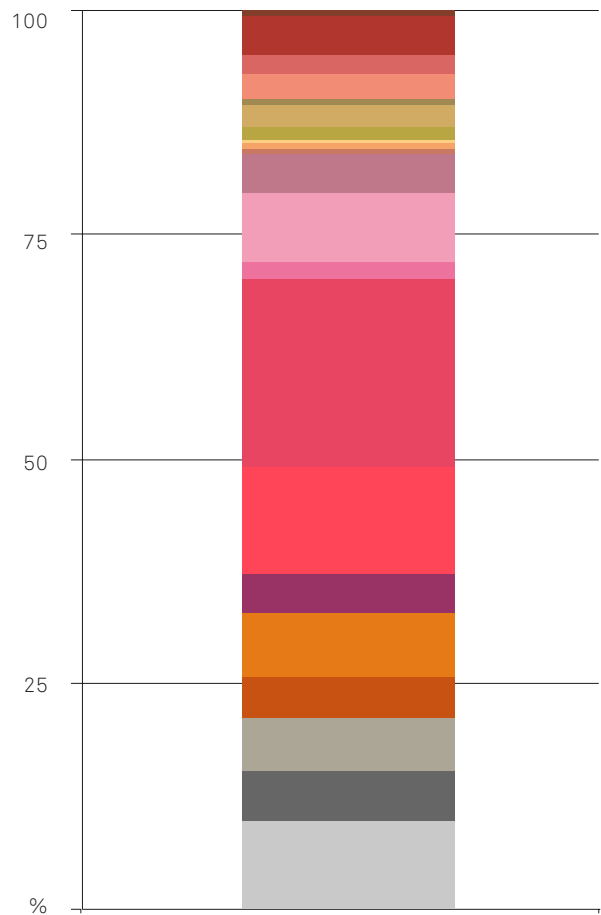
3: Central Stratford & Southern Queen Elizabeth Olympic Park

Business activity

The Central Stratford and Southern Queen Elizabeth Olympic Park sub-area provides the second significant area of employment in the LLDC area alongside Hackney Wick and Fish Island. The sub-area is now home to new large-scale office provision, with buildings along Stratford High Street and the International Quarter London (IQL) development gradually coming online, with over a million sq.ft of floorspace still to be delivered in the coming years.

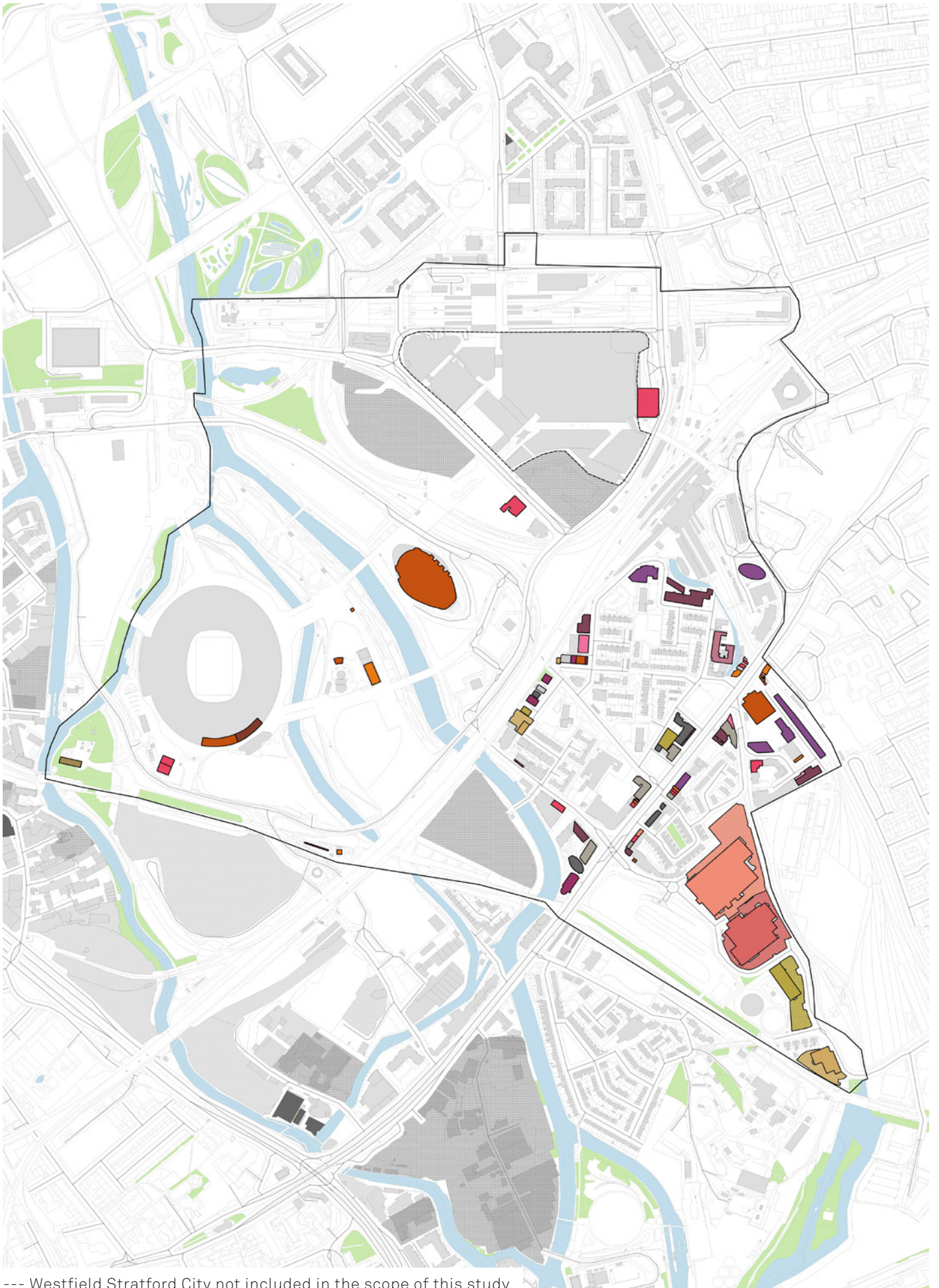
The 201 businesses identified make up 31% of businesses resident in the LLDC area. The single largest sector in the sub-area is service activities, at 21% of businesses in the sub-area. 20 businesses are engaged in creative activity, primarily working out of the Stratford Workshops site and the northern edge of the Carpenters estate.

As in 2014, service-based businesses form strong clusters in this area, with financial & legal and 'other' services most well-represented. 15% of businesses, primarily cafe, restaurant, hotel and retail businesses, operate during the night-time economy. This matches the average across the LLDC area.



Key

- | | | | |
|---|--|--|---|
| Manufacturing: food & drink | Construction | Info & Comms: other | Restaurants & cafés |
| Manufacturing: textiles | Vehicle sale & repair | Services: financial & legal | Night-time & drinking venues |
| Manufacturing: printing & publishing | Wholesale: construction | Services: design & architecture | Leisure |
| Manufacturing: other | Wholesale: other | Services: other | Other |
| Utilities & waste | Transport & storage | Education & health | Vacant |
| | Info & Comms: sound & video | Arts & culture | Unknown |
| | | | Mixed tenants |



--- Westfield Stratford City not included in the scope of this study.

Employment

Just under 4400 (4399) individuals are estimated to be working across the Central Stratford and Southern Queen Elizabeth Olympic Park sub-area, with the average business employing 26 people. This is the largest estimate and average across the LLDC area. This large number is undergoing a lot of change currently as large employers, such as TfL move into the IQL development, and the Guardian Printworks shuts-down in 2018.

Where reported, the average business in this sub-area has been at their current location for 5.9 years, closely matching the average across the LLDC area. This could be reflective of the stability provided by the Stratford Workshops site and Stratford High Street properties. This average will likely change over coming years as IQL continues to grow and tenants at Stratford Workshops look to move in the context of the possible redevelopment or service charge increases change the occupation of the LB Newham-managed property.

Workspace

Businesses in the Central Stratford and Southern Queen Elizabeth Olympic Park sub-area mainly occupy a mix of small and large office spaces, retail spaces and workshops. The Guardian Print Works and the Kessler factory occupy some of the largest single footprint industrial spaces across the LLDC area. The IQL development will eventually provide around four million sq ft of Grade A office space and will be the largest amount of non-retail workspace in the LLDC area.

The retail spaces that make up the street-frontage of buildings along Stratford High Street also provide small office spaces and examples can be seen of creative industries utilising these spaces.

Creative Industries

20 businesses are engaged in creative activity across the sub-area, primarily working out of the Stratford Workshops site and the northern edge of the Carpenters estate. Creative activity is present in

manufacturing, information, communication, design, architecture, sound, video and other services. 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.



Artist and maker studio units managed by V22 on the edge of the Queen Elizabeth Olympic Park, alongside a cafe space and property management offices.



Business units on the ground-floor of new residential schemes along the high street.



Sports facilities and associated services offered in industrial units neighbouring central Stratford.

4: Bromley-by-Bow, Three Mills & Pudding Mill

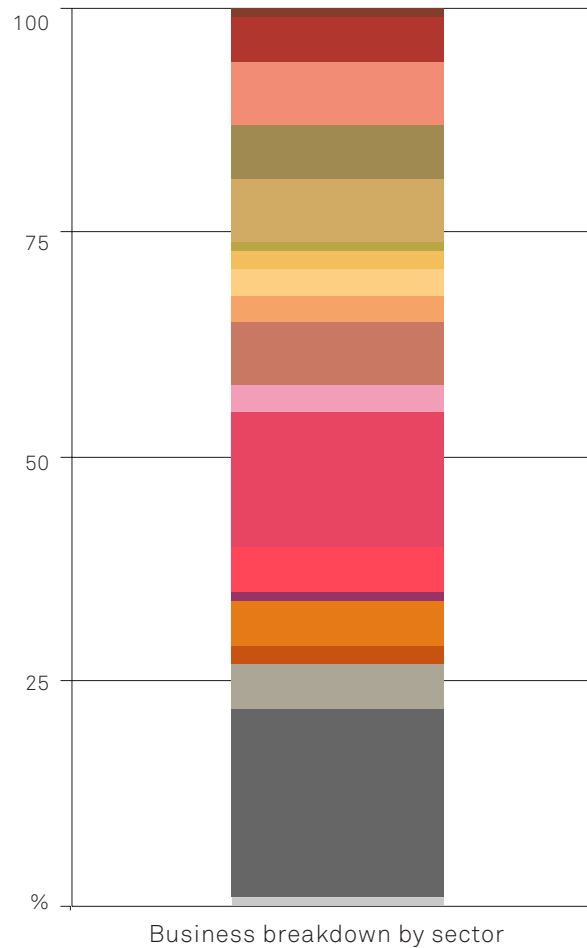
Business activity

Various large-scale redevelopment projects and the Crossrail works mean that large parts of this sub-area remain economically inactive. The Three Mills Studio site remains an international centre for film and television production.

























The 62 businesses identified in Bromley-by-bow, Three Mills and Pudding Mill make up only 9% of businesses resident in the LLDC area with most sectors are represented. Only 6 businesses are identified as engaged in creative activity, including Three Mills Studios itself. Only 8 businesses operate during the night-time economy. This is the smallest number of any sub-area.

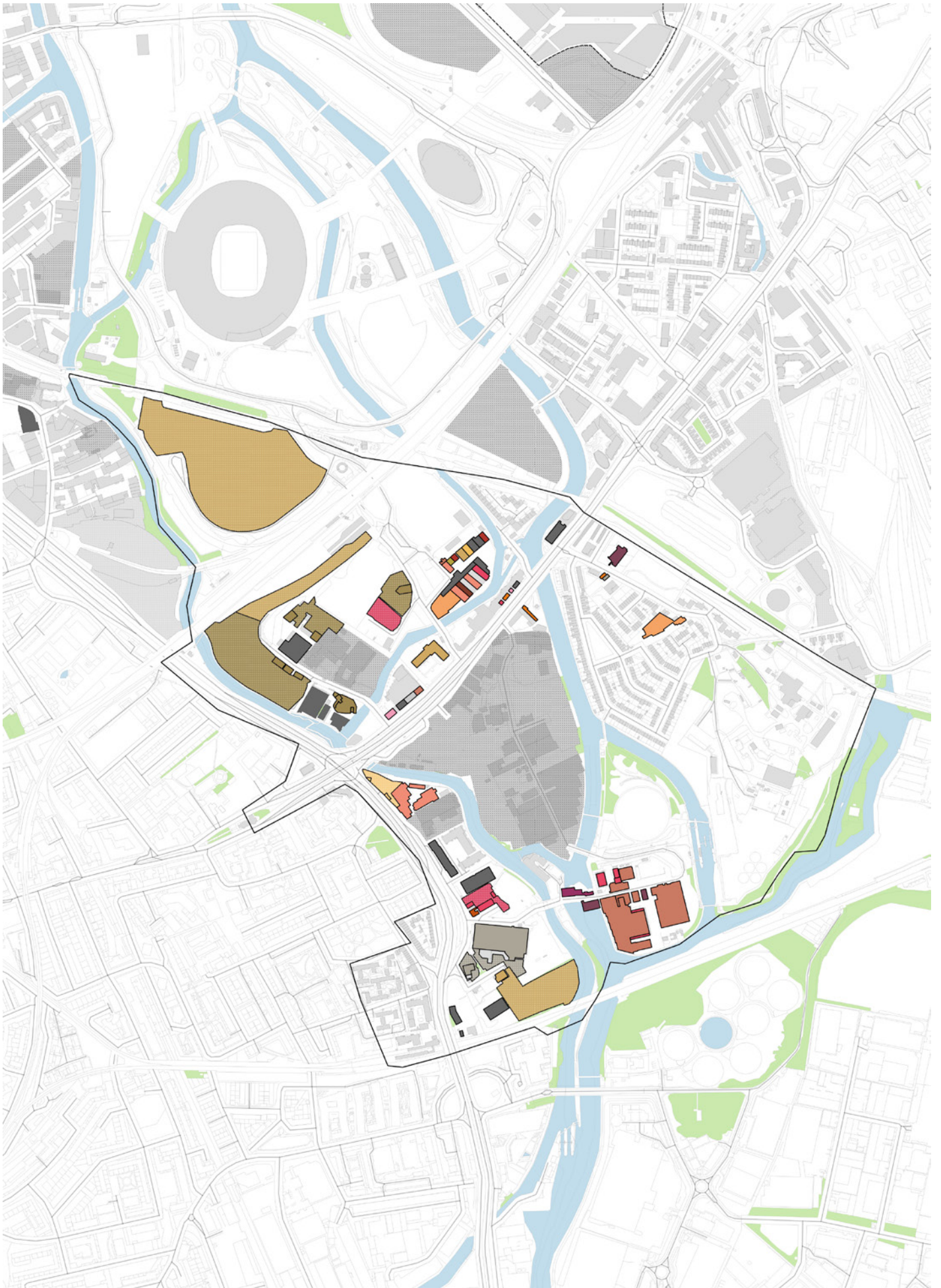
Employment

Just under 700 (679) individuals are estimated to be working across the sub-area, with the average business employing 14 people. Where reported, the average business in this sub-area has been at their current location for 9.5 years. This is the longest average period across the LLDC area. This is representative of how little turnover and new workspace has been provided in Bromley-by-Bow, Three Mills and Pudding Mill in recent years.



Key

 Manufacturing: food & drink	 Construction	 Info & Comms: other	 Restaurants & cafés
 Manufacturing: textiles	 Vehicle sale & repair	 Services: financial & legal	 Night-time & drinking venues
 Manufacturing: printing & publishing	 Wholesale: construction	 Services: design & architecture	 Leisure
 Manufacturing: other	 Wholesale: other	 Services: other	 Other
 Utilities & waste	 Transport & storage	 Education & health	 Vacant
	 Info & Comms: sound & video	 Arts & culture	 Unknown
			 Mixed tenants



Workspace

Half of the businesses in this sub-area occupy either small or large industrial spaces. This is representative of the two clusters of industrial workspace around Marshgate Lane and Three Mills Studios where older industrial sites have been adapted for different uses, including creative activity.

Creative Industries

The 6 businesses engaged in creative activity across the sub-area, all work in photography or film/television production. These are split between Three Mills Studios and Marshgate Lane. Three Mills Studios reputation has continued to grow since its role in the 2012 Games and today facilitates productions for international film projects and high-growth new media outlets such 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 of the sub-area.



Three Mills production studio complex, which includes educational and training businesses, post-production studios, equipment hire and rehearsal spaces as well as film and photography studios.



Large-scale residential-led schemes alongside older industrial building stock.



Construction-related suppliers and wholesalers based in yard spaces around Pudding Mill.

DETAILED BUSINESS INTERVIEWS

Business type

Detailed interviews were conducted with 53 businesses in the LLDC area. The sample of businesses targeted for interviews were selected as they reflect the sector make up of the LLDC area's business base. The greatest proportion of interviews are drawn from the LLDC's most prominent activity sectors - services, food & drink manufacturing, textile manufacturing, other manufacturing and vehicle repair businesses. Other key detailed interview groups include businesses working in information & communication, the arts, design services and education. The analysis below is not representative of the full LLDC economy, but rather provides particular insights into the operational, staffing and spatial needs of particular businesses, as well as more qualitative information on future growth prospects and the experience of working from the LLDC area.

Organisational structure

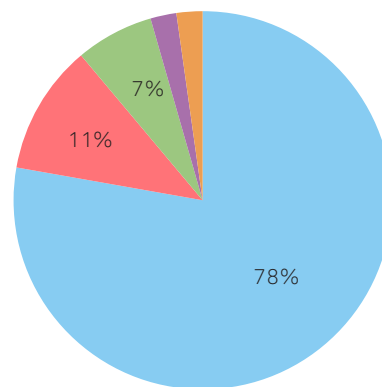
Across those businesses interviewed, independently-owned businesses are the most common form of organisational structure in the area, followed by businesses that are branches or subsidiaries of larger businesses. Service and manufacturing businesses are most strongly represented in the 'independent' business category, while wholesale, construction and vehicle repair businesses appear more likely to be part of wider commercial structures. Across these organisational structures, independent businesses are more likely to have smaller workforces (less than 10 people), while branch or subsidiary locations are more likely to be mid-scale in size (employing between 10 - 49 people).

Ownership

For the first time, demographic data has been collected to better understand the make-up of the LLDC business base ownership. Only 9% of interviewed businesses reported to be in majority female ownership, and of this only a very small proportion included BME owners. Across all interviewed businesses, majority (white) male ownership is by far the most common ownership profile (78% of businesses). Those businesses

reporting BME ownership profiles include those working in the arts sector, in manufacturing and in vehicle sale & repair. Majority female ownership is reported most commonly in textile manufacturing, and education businesses, and these are most likely to be independent businesses.

Little comparable research has been done on ownership profiles in areas similar to the LLDC, UK wide studies estimate that 20% of single-person businesses are owned and run by women and around 18% of SMEs in the UK are majority-led by women¹. Given the prevalence of SME businesses in the LLDC area, these figures do provide a degree of benchmarking which suggest that the LLDC is behind the national average in terms of diverse business ownership.

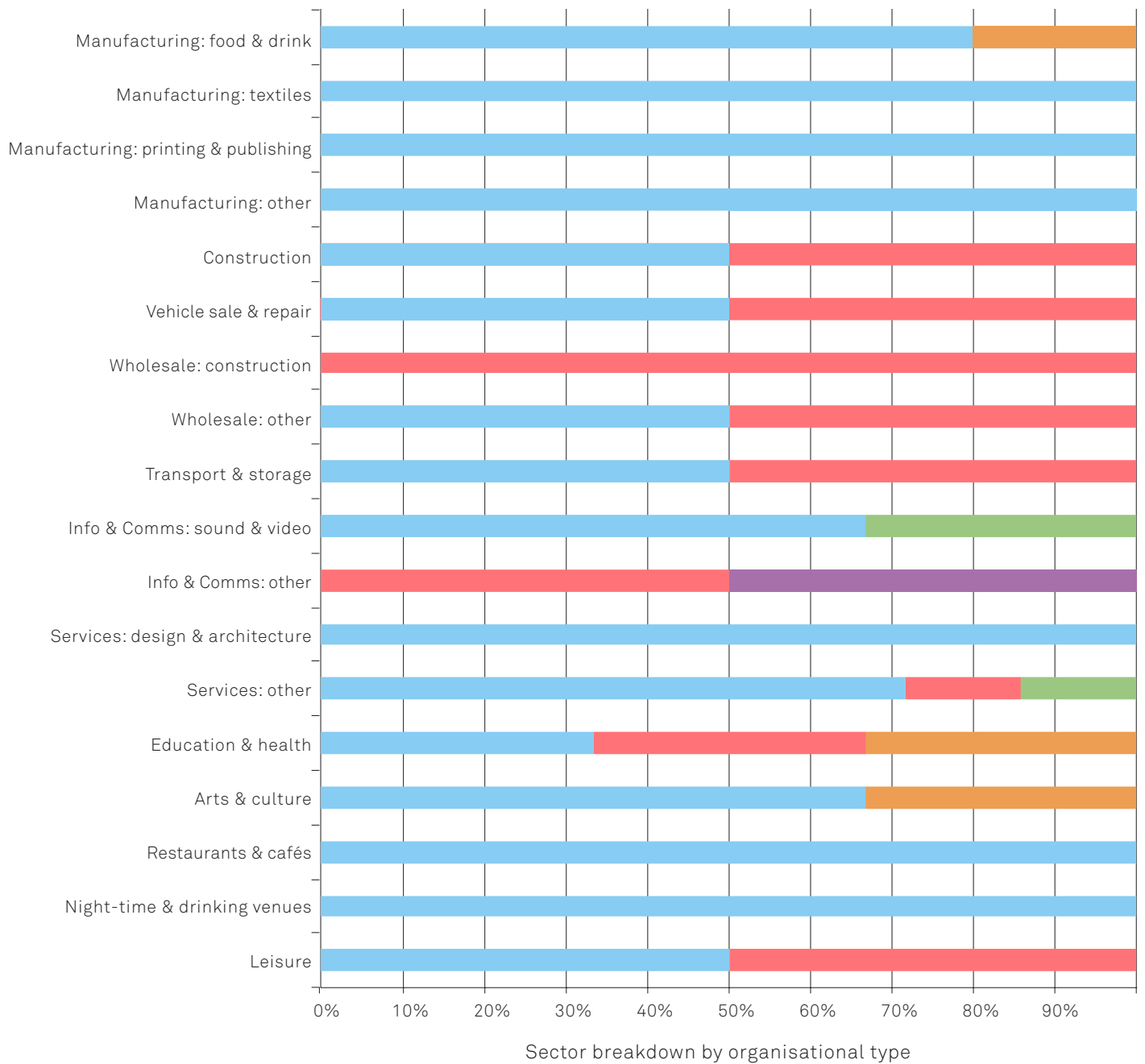


Ownership profiles

Key

- Majority male
- Majority male, BME
- Majority female
- Majority female, BME
- Majority male, majority female

¹ Department for Business, Innovation and Skills, Small Business Survey, March 2015



Key



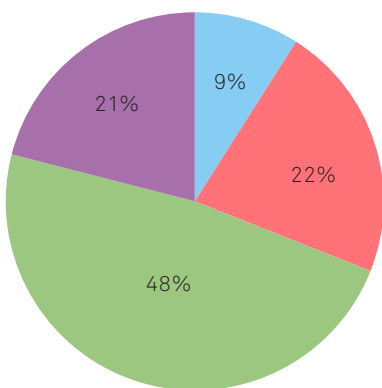
Employment & recruiting

Locality of employees

Interviewed businesses report a strong local employment base - with a 52% local workforce reported on average across all sector groups. 'Local' should be understood as the four LLDC-neighbouring boroughs: Hackney, Newham, Waltham Forest and Tower Hamlets. The other 48% of employees are based elsewhere within London. Sectors with the highest reported local workforce (80%+) include vehicle sale & repair, food & drink manufacturing, 'other' manufacturing and businesses working in the arts. 'Other' services are the most common business activity reporting no local workforce.

Commuting

The local geographies of the LLDC's workforce support a strong patterns of sustainable transport use. The vast majority of employees from interviewed businesses make use of sustainable modes of transport to get to work - with a particularly strong representation of cyclists in commuter patterns. A notable proportion of employees do, however, drive to work within the area (21%). These car-based trips occur across activity



Employee commuting modes

Key



sectors, and might be tied to working hours, the need to transport materials / stock or daily client-based travel as part of employment activities. Vehicle repair businesses are the most common sector to report high car-based commuting patterns.

Recruitment

Recruiting experiences vary across businesses, but typically those working in more industrial sectors tend to report more difficulty in finding staff suitable to their businesses. Businesses operating in manufacturing sectors report an equal mix of recruitment ease and difficulties, typically determined by the degree of specialist machinery involved in production processes. Food & drinking manufacturing businesses generally report an ease in recruitment in the area, reporting that most unskilled positions are easy to fill and that people move between local businesses. Some businesses, like brewers and caterers, do report difficulties in finding experienced staff members and staff to fill event-based positions (part-time). Textile businesses report an overall difficulty in recruiting suitable staff given the skill requirements of the industry, including machine and hand-sewing skills. One business noted that younger generations are more focused on designing clothes over the production of garments.

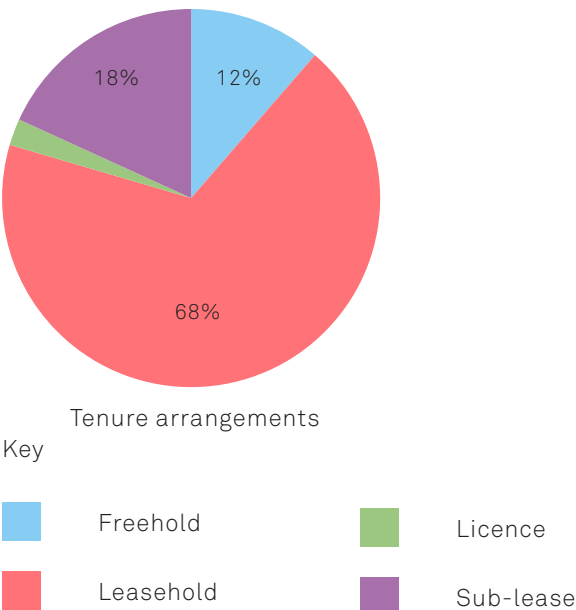
Vehicle sale & repair businesses report difficulties in securing staff given the particular knowledge needed, the salary conditions and the variety within the types of jobs within the industry. Some businesses run trial periods for new employees and one business runs an apprenticeship scheme but has struggled to find apprentices. Construction, transport and wholesale businesses report using recruitment services and labour supply businesses, so have little direct experience of recruitment. Overall, service businesses report an ease of finding staff given the LLDC's area's proximity to central London, although some do report running graduate and training to meet the needs of their particular businesses. Leisure and food & drink amenity businesses like restaurants report little difficulties in recruiting suitable staff for their businesses.

Site needs

Tenure & rent

Leasehold tenure arrangements are the most commonly reported form of tenure. A small proportion (12%) of businesses report owning the freehold of their premises, including transport & storage businesses and services businesses. The proportion of businesses operating on sub-leases (18%) is reflective of the area's flexible workspace stock and the legacy of shared workspace in the area. Businesses operating on sub-lease arrangements include smaller-scale textile businesses, arts activities and design service businesses. Given the high proportion of businesses operating on leaseholds, the nature and length of these arrangements impact the turnover and security of a large proportion of LLDC-based businesses. Businesses interviewed reported an average remaining leasehold time period of just over two years, and only one business reported a remaining leasehold period of over five years. This landscape contributes towards the expectation of change amongst businesses and is often cited as reason for plans to move within the next year.

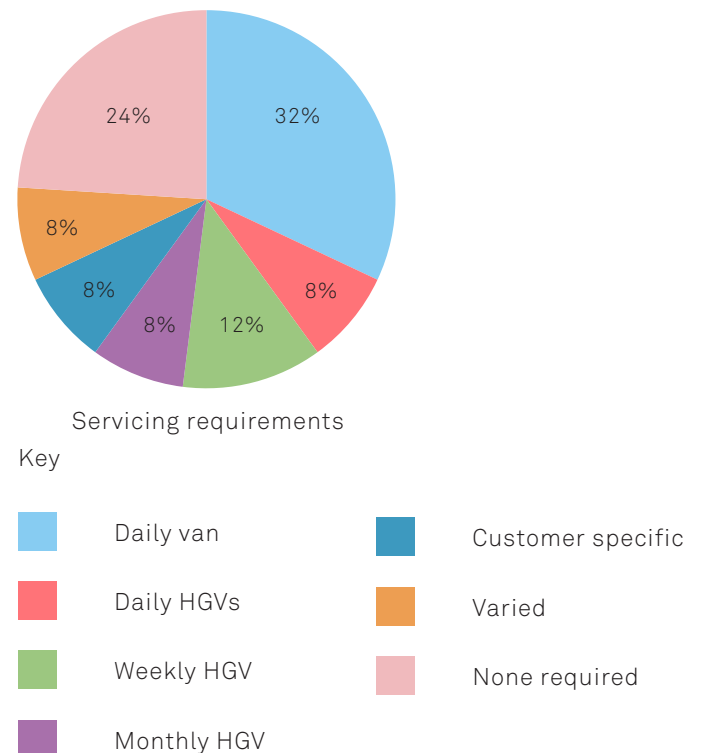
Based on the few businesses across the LLDC area who were able to report on their rental levels, businesses are paying £13.29sq.ft on average. Reported rents

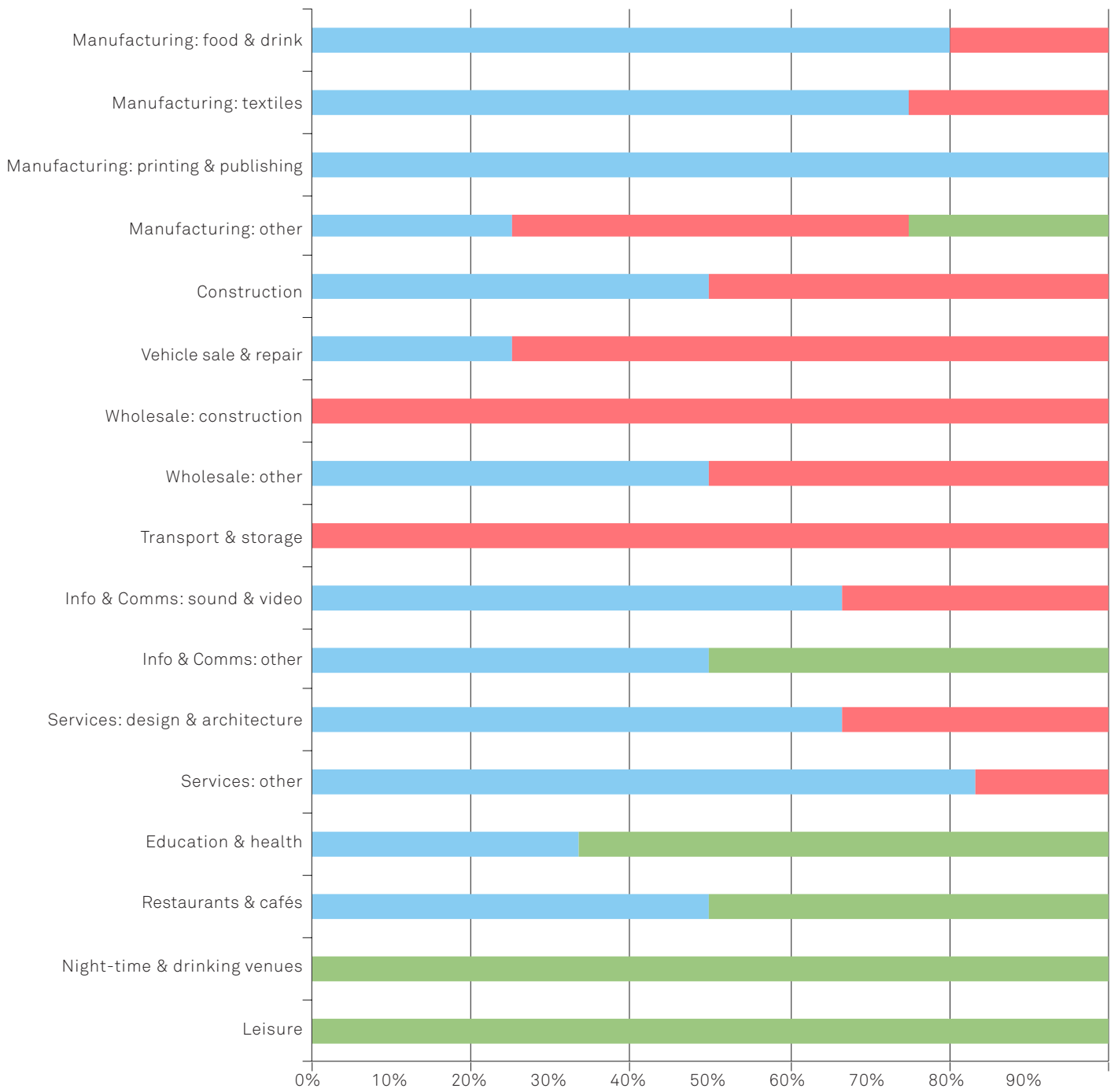


range from £8/sq.ft to £25/sq.ft, reflecting the changing landscape of workspace affordability in the area. There was no identifiable link between tenure length and rates charged within this sample.

Servicing & operating hours

Across interviewed businesses, servicing requirements appear to be weighted at two ends: no particular servicing requirements (typically service businesses) and daily servicing requirements (by van or by HGVs). Most businesses (60%) do require some form of servicing provision as part of their core operations. This includes yard space, loading bays and goods lifts. These particular spatial requirements should be considered in tandem with typically reported operating hours and days which highlight that construction, wholesale and vehicle sale & repair businesses tend to operate on six days a week, and that some services and leisure uses operate every day of the week. These operational requirements should inform the planning and design solution for mixing these sectors with other uses.





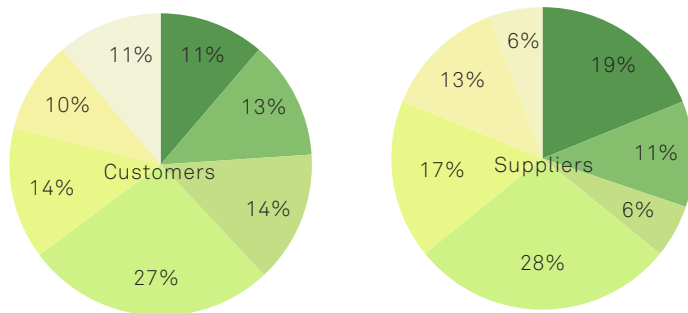
Key Days of operation across activity sectors

- Weekdays
- Weekdays, Saturday
- Weekdays, Saturday, Sunday

Geographies of operation

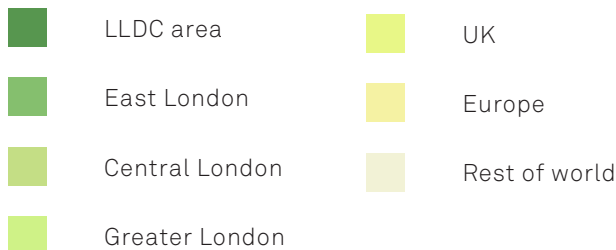
Suppliers & customers

The LLDC business base is one that is both served to and is served by London. A high proportion of business suppliers are reported to be based in East London (30%), including a notable proportion in the LLDC area itself. UK-based and European suppliers play an important role for around a third of businesses, but the Greater London area and the local LLDC economy are key supplier and customer locations for most businesses, with around 65% of businesses reporting that their core client and supplier bases are within the Greater London area. This highlights the LLDC's transport links and accessibility to into and across London as a key asset for the majority of its business base.



Geographies of operation

Key



Local links

Across the LLDC area, businesses report a variety of business and community links, from formal supply chains to information sharing and artistic collaborations. At the hyper-local level, artist studio tenants and local resident artists have collaborated with cultural venues like the Yard Theatre and Stour

Space. Food & drink manufacturing and catering businesses report supplying into event venues and local leisure and amenity outlets like the Hackney Wick Boulder Project and the Queen Elizabeth Olympic Park sports venues. Some food businesses report strong identity and branding links to the local area, having started businesses in the area and now focusing distribution of their products to stockists in the 2-mile radius of Hackney Wick, including looking to supply the area's new residential-led and amenity developments. Some manufacturing businesses in turn supply local catering businesses with associated products like paper towelling. Construction businesses report links with local trade counters and other construction supply companies, and vehicle sale & repair businesses report to trade customers in the area and carry out maintenance on the vehicles of neighbouring businesses.

Associations like Creative Wick Community Interest Group and Hackney WickED have brought some residents, businesses and creative and artistic practices together in collective planning and promotion of the Hackney Wick and Fish Island neighbourhoods. 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. Event, night-time and leisure-based businesses report to sharing event and activity information through local businesses and other venues.

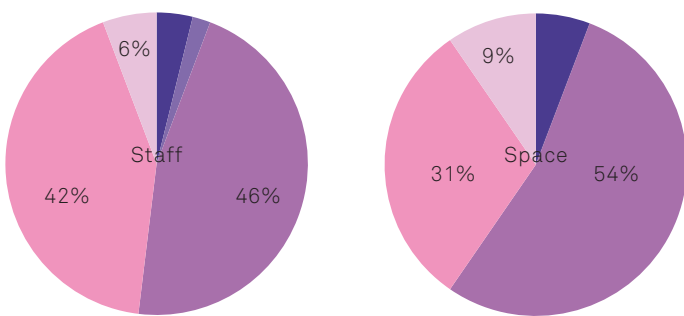
Across a wider east London geography, creative production and design service businesses report links to businesses in neighbouring boroughs and charities report links to community and educational organisations across the growth boroughs, including engagement with local school networks. Some businesses also report close links to local Hackney freelancer networks in order to staff and support project-based work and other commissions.

Anticipated growth

Anticipated staffing & workspace needs

Across the businesses interviewed, the majority of businesses expect business to remain the same or grow marginally within the next year. Demand for staff within the coming year is the priority for more businesses than the demand for more workspace, with almost 50% of businesses expecting to need more staff within the coming year, in comparison to only 40% of businesses expecting to need more space. Businesses expecting to need more staff and space within the coming year include those working in the food & drinking, textile and other manufacturing sectors as well as those working in sound production and design services. Only a small number of businesses are expecting their staff and space needs to decrease in the coming year.

Of businesses who are expecting their staffing needs to increase in the next year, most are expecting their workspace requirements to increase slightly as well - suggesting that business will need to look for additional space or re-configure existing premises to accommodate more staff. Only a handful of businesses expect their need for space



Anticipated growth within the next year

Key



to increase substantially in line with their staffing increase. Some of these businesses report actively looking for more space and a desire to stay in the LLDC area, but none have reported securing new workspace in the area.

Perceived quality of the area & impact on business

In the context of this anticipated growth, businesses reported on how the quality of the LLDC's offer (culturally, environmentally and amenity-wise) impacted on their work and their future prospects. A number of businesses point to the need for improved local business amenities and infrastructure like ATMs and postboxes in order to make it easier to do business in the area. Others highlight the lack of food offers for staff and clients in locations outside of central Stratford. Leisure and service businesses who are more reliant on client meetings and visitors highlight access and transport links as ongoing challenges to their businesses, but a number of other businesses note that transport links have improved in the local area and that there are good transport options for both clients and staff. Maker and small-scale manufacturing businesses cite the proximity to building supplies and trade counters as an attractive quality of the area.

Westfield Stratford City and central Stratford are considered to be strong assets which help to attract staff, particularly given the retail and food offer in that sub-area. A number of businesses recognise the value of the local creative community and existing support and collaboration networks in the Hackney Wick and Fish Island neighbourhoods to their businesses. Others recognise the role that local gallery spaces, artists and studio spaces play in bringing visitors to the area, and report that they feel this attraction is 'weakening' as some artists and creative businesses are seen to be leaving the area. Some businesses cite the levels of ongoing construction and redevelopment as disruptive to their business operations. The area's reputation and legacy as a place for creative businesses and artistic production is seen as 'crucial' by some businesses to their operation as it attracts both staff and its clients.

Views on the LLDC area

Why choose to locate here?

Businesses report a mix of infrastructural, spatial and geographic qualities when reporting on what drew them to the LLDC area. The proximity to transport links, particularly into central London, is commonly cited as a key attraction of the area. Proximity to clients and stockists in central London, Canary Wharf and the Docklands area are all cited as attractive feature of the LLDC area's geography.

Some businesses cite the particular typologies of workspace in the area as attractions - including businesses looking for large ground floor plate and those seeking workshop or studio units rather than office space. Others report that they chose to locate into the LLDC area because of the attractive price point of workspace in the area. Some businesses grew out of co-working or shared workspaces in the area and have remained in the area, while others were drawn to the area by the community of creative tenants in the many of the shared workshop and studio buildings. Businesses also report that the east London area is closely linked to their businesses' identity and to the geography of where their staff live. Other businesses are run by local residents who value the area's proximity to home.

A strong East London customers base, including school networks and health organisations, led some businesses to become established in the area. Food & drink and leisure-type businesses report a mix of reasons for locating into their current premises, including local customer bases, a sense that their offer ties in well with the sports and gaming narrative of the Queen Elizabeth Olympic Park, and perceived benefits from being located in proximity to local amenities like the canal and the event venues.

Overall, businesses report a mix of reasons for choosing to locate into the LLDC area. Pricing, while undoubtedly important, is not the only factor determining business location. The form of available workspaces, infrastructure provision, the make up of existing businesses and activity in the area are all factors in influencing decisions around location. This suggests that new employment space delivered in the area should be mindful of the form, function

and future tenants of the space, as well as a the price point.

Strengths of the area

Particular strengths of the area which have been identified by interviewed businesses as supporting their activities and operations include:

- A growing residential population, resulting in an increasing customer base;
- Proximity to central London (including the City & London Bridge area);
- Proximity to transport road links (A12, A13, Blackwall Tunnel);
- Public transport links (DLR, rail & Overground) for staff;
- Affordable workspace rents (for some businesses, historically, for others, currently);
- Creative community / 'community feel' of the area;
- Proximity to Westfield Stratford City & Stratford;
- Links to other businesses in the area and local trading opportunities;
- Culture of the area (considered good for start-ups and business testing);
- Links to the local artist community and industrial craft making (including skill swaps / services);
- The cultural identity and reputation of the area (to customers & to staff);
- The local building stock and size of workspaces available (i.e. unit sizes);
- The variety of neighbouring businesses
- The cultural and sports activities available in the area (e.g. football club)

Desired improvements

Workspace protections, small business support, infrastructural improvements, a wider and more localised amenity offer are amongst the most commonly reported improvements to the LLDC area that businesses would like to see. These include:

- Improved management of traffic and crowd in-flow on 'match days' (e.g. clearer marking of streets for event parking and better information for businesses in terms of event-day regulations)

- on parking and circulation);
- Improved basic amenities (ATM, post office, commercial space, food offer, particularly for lunch, covered bike parking) to improve desirability of area to staff and businesses;
 - Improvements to safety (better lighting of roads and cycle paths at night) and more security around the canal and cycle paths;
 - Better signage / way-finding for both visitors and clients;
 - More available workspace in the area for business expansion;
 - Improved parking provision (for customers) and congestion charges to ease road traffic;
 - Security of tenure / confidence of businesses to stay in the area;
 - Maintaining affordability of workspace (across both rental and business rates);
 - Improved public transport (especially Overground functionality) and increased bus routes;
 - Retention of industrial-type workspaces and prevention of the loss of the existing resident and business community;
 - Improve foot traffic for businesses in the area and reduce isolation from the rest of the borough(s);
 - Improved internet speeds
 - Affordable business rates & business support for smaller businesses;
 - Reduced pollution in the area (including noise pollution), more greening of the area
 - Parking regulations that take account of businesses needs and production activity in the area (e.g.. artwork transport, deliveries)

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EMERGING EMPLOYMENT TRENDS

New arrivals

The LLDC's current business base is one which is relatively newly established in their workspaces.

Of business profiled on their premises tenancies (263 businesses), over 70% have moved into their current premises within the last five years. Almost half these new arrivals have more into their current workspace within the last year.

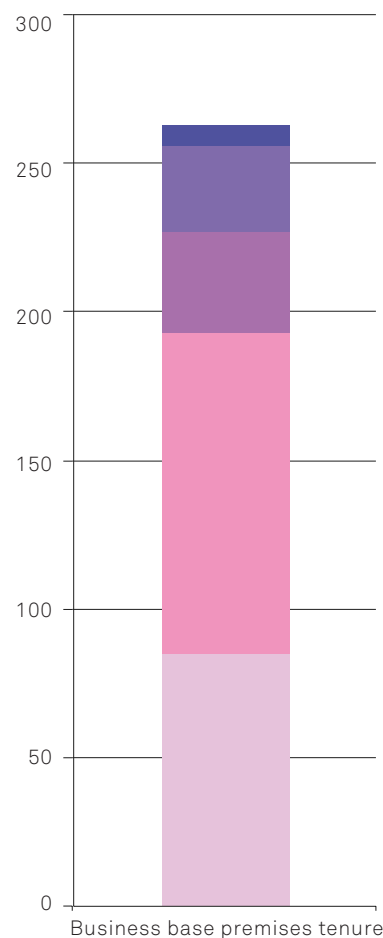
Premise tenure ranges across the LLDC area - with businesses in the North Stratford sub-area averaging 3.6 years in their current premises, while those in the Bromley-by-Bow / Pudding Mill sub-area average 9.5 years, reflective of the large-scale development in North Stratford post-games as well as the legacy of the area's industrial past.

Services and arts and culture businesses are the most common recent arrivals to the area, including design services, maker and photography activities. 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 Here East. Typically, these 'new arrival' businesses employ ten people or less.

Businesses with longer-term footholds into the area include more traditional manufacturing and light industrial uses like vehicle repair, construction activities and food, textile and other manufacturing.

When asked about previous locations of business, a third of businesses report to have moved from other East London locations, and around 15% from within the LLDC area itself. Smaller proportions have moved into the area from North London or from outside of London. This points to both the attractiveness of the LLDC area as a business location, but also to a degree of flexibility and fluidity within the LLDC area it. Some businesses who have needed to move premises (whether due to their own needs or external conditions), have been able to re-locate within the area successfully, including light industrial uses and creative sector businesses.

Notably, 16% of businesses profiled on this subject report their current LLDC premises as being their first location - highlighting the role of the area in supporting new enterprise and early-stage businesses. These include new co-working spaces like 451 Dye House Lane and Craftwork, as well as cafés and restaurant businesses like Crate, Hackney Pearl and Gaia Pulses.



Key



Expected short-term change

In the context of continuing change, redevelopment and regeneration of the LLDC area and surrounding neighbourhoods, the employment profile of the area is expected to continue to evolve within a relatively short time-frame.

Of those businesses profiled on their future plans (162 businesses), a quarter reported plans to move from their current premises within the next year and a further 10% reported uncertainty as to whether they will remain their current premises over the next year. This suggests that around 35% of the profiled business base could be expected to change within the year.

Of those businesses reporting to plans to move within the year, businesses in service, food and drink manufacturing, other manufacturing vehicle sale and repair activities are the most common. Notably, some food and drink wholesale and manufacturing businesses report plans to retain a presence in the LLDC area through a retail, restaurant or supplier offer, while moving their 'production' operations outside of the area. This ties into the LLDC's increased food and drink amenity servicing a growing residential population.

Key reasons given by businesses for their plans to move include the sale and redevelopment of workspace, business expansion and the need for more space, rising rents and business rates and the increasing challenges of moving goods into the area. Disruptions related to construction and redevelopment in the area is also cited by some businesses as reasons for uncertainty around their future in the area. Redevelopment plans for particular densely occupied sites including Queens Yard, Stratford Business Centre and Marshgate Business Centre are contributing to this flux of businesses, are pressures and uncertainties in redevelopment 'hotspot' sites in Hackney Wick, Fish Island and Pudding Mill areas. On average, these businesses expecting to move within the next year, employ between 15-20 people. Few businesses have secured new workspace to move to, but most businesses profiled report a desire to stay within the LLDC area. Other identified locations include

Rainham, Hackney and Essex and a wider look 'outside of London'. Price, transport connections are key considerations which will determine where these businesses chose to relocate to.

A large quantum of B-class floorspace is in the process of being delivered across the LLDC area. This employment space has been secured through planning conditions and will be informed by the LLDC's workspace guidance which aims to ensure new workspaces are flexible and appropriate to existing sectors in the area. This new floorspace will result in options for re-location for local businesses, but timing remains a key issue, as many businesses need to move out of their premises before new space is available. A mix of B1, B2 and B8 floorspace will be critical to retaining the current mix of employment sectors in the area. While the LLDC area clearly remains an attractive area for many businesses, their ability to access new workspace coming forward onto the market in the area will be highly dependent on the delivery timing, coordination, communication and suitability of these spaces. There is a clear role for business re-location strategies and meanwhile employment space uses in delivering this coordination.



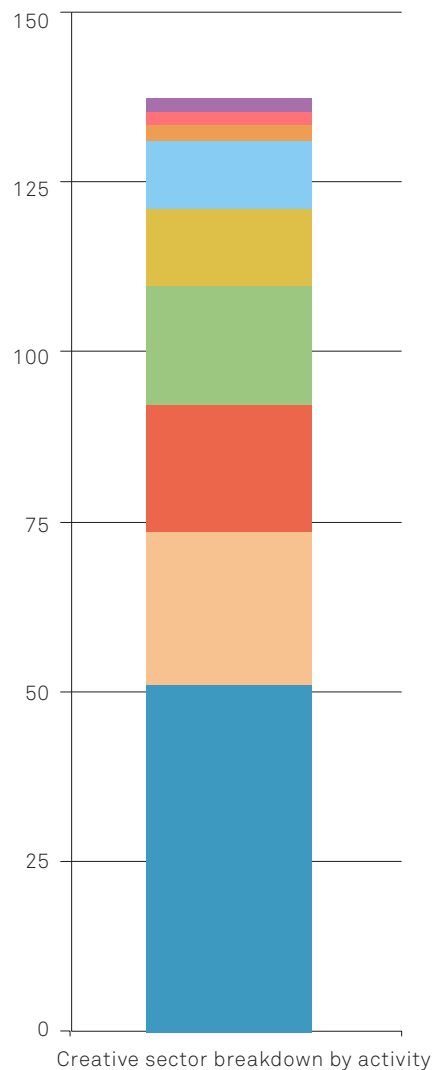
Queens Yard is home to a range of businesses who report to be moving away within the next year.

Creative industries

The LLDC area continues to support a strong concentration of creative sector businesses and associated workspaces. Around a third of the LLDC's total business base is estimated to be operating within the creative sector. Within this base, there are key sub-sectors of creative activity: fine arts and creative practice, film & television activities, sound and audio-related activity, specialised design services, photography and architecture-related services.

In addition, the area continues to host one of the largest concentrations of artists' studios in London, with over 300 studios within the LLDC area. This provision is delivered by long-standing artists' workspace providers like Cell, SPACE and ACME who manage studios across London, as well as by newcomers and local providers like MotherX Studios and Arbeit. The dynamics around employment and individual businesses operating out of these sites is complex. These sites support both commercial and non-commercial artists and other creatives. How these individuals choose to manage their practice as a business also varies. On-the-ground research also suggests that the area's co-working spaces, including 451 Dye House, 90 Main Yard and Plexal are host to creative sector businesses, primarily service-based in their activities. Collectively, this illustrates that the LLDC's creative economy is substantial and wide-ranging.

Observational research suggests that the dynamics within the creative sector (rather than a move towards or away from the sector) are taking place within the LLDC area. As the profile of the area has improved and the workspace in the area becomes more coveted, a new 'wave' of creative sector tenants has moved into the area. These tenants are typically more established, have some London-wide or international connections and are able to afford higher rental and business rates than the LLDC's historic business base. These businesses include visualisation and information design services, post-production services, recording studios, photography services and fashion design brands.



Key

- | | |
|--|---|
| ■ Creative & arts | ■ Photography |
| ■ Motion picture, video & television | ■ Architecture |
| ■ Sound recording & music publishing | ■ Publishing |
| ■ Specialised design activities | ■ Software publishing |
| | ■ Creative managed workspace activities |

This echoes trends across the wider context of artists' workspace in London, with providers suggesting that although demand and occupancy rates continue to be high, the profile of those artists who are able to afford and sustain studio space in their buildings has shifted towards mid-career and career-change artists, and away from graduate or early-stage career artists. Recently delivered and pipeline delivery of artists' workspace also suggest an emerging shift to more dispersed provision outside of the traditional East London geography, due to pressures of site redevelopment and rising costs.

The LLDC area is not immune from these changes, and recent thinking and anecdotal evidence suggests that the LLDC area has lost more artists' workspace than has been re-provided in recent years. In addition to this, wider affordable workspace pressures, not just in the arts sector, mean that some artists' workspace providers welcome other commercial tenants to take up what has traditionally been considered artists' workspace. The overall impact is that less space is available for those occupiers engaged in artistic activity only. Large new artists' workspace sites currently in the pipeline in Greenwich, Silvertown, Deptford and Southwark further stand to challenge the LLDC area's reputation as a place for artistic creation.

However, the LLDC area has a long-standing reputation as a home for creative industries and artists working from studio and industrial-type workspaces and forthcoming employment space seeks to build on this strength. The spatial characteristics and requirements of these creative workspace typologies, in particular workshop / studio type spaces and small industrial spaces, are detailed in the in the 2015 LLDC Employment Space Study.

Typically, these creative workspaces are housed in B1c or B2 use classed space. As identified in the Economy and Employment Land Review, the majority (76%) of pipeline B-class floorspace consented in the LLDC area (at the time of the study) is B1a



Arbeit Studios / Arebyte Gallery operating from a refurbished industrial unit on Wallis Road.

office space. However, there is also a considerable quantum (c. 90,500sq.m) of B1c and flexible B1 space consented across the LLDC area, particularly in the Hackney Wick Central area, with these spaces are intended to be flexible in function to support the needs of a variety of occupiers.

Food & drink: production & amenity

The LLDC area has experienced a notable growth in businesses working in food & drink-related sectors over the past three years. Since 2014, the number of food & drink manufacturing businesses has almost doubled. While only a handful of larger-scale food manufacturing businesses remain in the area, these new arrivals are typically smaller-scale drink manufacturers and catering companies.

Food & drink-related businesses make up around 12% of all businesses in the area. Of all the food & drink businesses in the area, over half operate in restaurant, hot food and mobile food activities (61%), a third in manufacturing activities and a smaller proportion are drinking establishments like bars and pubs (12%).

Just under half of these businesses are active during night-time hours (beyond 8pm), acting as core anchors for the area's night-time economy, including in event spaces like Bloc and Swan Wharf. Of the restaurants / hot food offerings, 50% are open into night-time hours, while the majority of food & drink production businesses only operate during work-day hours.

Small workshop and industrial units are home to a growing number of street food and event catering businesses. These businesses are typically based in the Fish Island area and serve a wider East London geography, with a particular focus on street-food markets in the Shoreditch area. These businesses typically need some industrial and/or yard space for food preparation or ingredients storage, as well as ancillary office space for management activities.

Within food & drink manufacturing, breweries and other specialist drink producers constitute a particularly strong offer. These include long-standing businesses in the area like Crate and Truman's Brewery, as well as new arrivals like Howling Hops. Specialist drink manufacturers include small batch coffee roasters and cold brew businesses like Minor Figures. Of these businesses, most have moved into the area from other East London locations, including Homerton, Stoke Newington and Hackney Central. Furthermore,

there is a growing presence of businesses involved in the online resale of craft beverages, including craft cider and craft spirits. Again, although these businesses are primarily retail services, they require storage space and accessible delivery points for their products.

The area has also seen growth in the number of catering businesses operating in the area - including three deli and event catering businesses who all operate from one industrial unit in Hackney Wick, sharing storage and delivery space. Many of the catering businesses report links to the sport and events economy of the area - with businesses supplying some of the LLDC's sports venues.

Since 2014, the LLDC area has also seen strong growth in the number of restaurants and hot food offerings in the area. This growth is primarily tied to the growth of the residential population around the Queen Elizabeth Olympic Park, with new openings clustered in the E20 neighbourhood and in Here East. These new openings can be seen as primarily visitor-focused, with businesses operating from Hackney Wick and Fish Island still report that there are not enough localised day-time food offers for their staff and clients.

These food & drink businesses present a clear opportunity to seed more localised amenity and night-time offerings in the area. Food & drink manufacturing businesses often support associated retail spaces which contribute to amenity offer of particular neighbourhoods. Small-scale coffee stalls, bars and deli spaces all sell the products made on-site and contribute to the place-making of a given area.

With local food and drink producers on it's doorstep, the LLDC's amenity offer stands to benefit from these businesses if they continue to be supported through the availability of affordable workspace and through partnerships with new markets and customers in the area.

Models of workspace provision

Since 2014, two distinct strands of managed workspace provision have become further established within the LLDC area: Grade A office space and workshop/studio units in sub-divided industrial units.

The LLDC's particular mix of industrial building stock - multi-storey, large floor plate buildings - have proven suitable to multiple forms of re-use. A number of these buildings are now occupied by a diverse mix of creative sector and service SMEs, typically in small units (less than 100sqm) delivered through the sub-division of larger industrial building. The service infrastructure (good lifts, large passageways and loading yard space) of the previous industrial uses support the particular mix of artistic production, making, light industrial and online retail activities now happening in these buildings.

Workspace provider Bloc, for example, has taken over the management of four separate industrial buildings in the Fish Island south area which now offer a mix of studio, workshop and office spaces to over 80 SME businesses. Creative workspace provider V22 manages 60 studios in a previously disused industrial warehouse building, which now accommodates a mix of artists, creative services businesses and social enterprises, and Pearl and Coutts manage a mix of light industrial, studio and office space across multiple floors in Queens Yard, providing workspace to around 30 different businesses. This workspace provision typically sees the replacement of single, larger industrial businesses with multiple small-scale start up and SME businesses within the same building footprint.

In and around central Stratford, a series of high-spec office buildings have been completed or are in the process of completion. These handful of new buildings accommodate thousands of employees, typically working in the public sector, health, property and other service activities. Buildings are typically multi-storey, large floor plate buildings with high-spec fit outs and shared staff parking. The type of workspace provision is typified by the Unex Tower, 4 Cam Road and 1 Stratford Place and will

be cemented by the completion of the International Quarter London, which upon completion will host approximately 25,000 jobs on site.

Although different in their spatial set up, investment requirements and tenant profile, both these managed workspace models result in increasingly dense sites of employment, bringing new business and employees to their respective neighbourhoods.



Managed workspace models across the area; V22 at Crown Close (top) and Unex Tower (below)

APPENDIX:
BUSINESS CASE STUDIES



Carhartt

Address: Hackney Wick Warehouse,
Wallis Road
Business: Clothing brand
(office & showroom)
Workspace: Small industrial space
Employees: 6

New to the LLDC area, international clothing brand Carhartt recently moved into a refurbished industrial building in Hackney

Wick. The building - branded Hackney Wick Warehouse- is shared with other businesses across different floors, including a visual design & branding agency, an outdoor clothing brand and a cafe / bar space soon to be opened on the ground floor. Carhartt is a subsidiary of a larger apparel company which was founded in 1889. The business's customer base is international and the business has stores and stockists across London including locations in Shoreditch and Kings Cross.

The office and showroom operations moved to the area from their previous East London location. The rental rates of the space attracted the business to the area, but the business reports that there are still some transport and way-finding improvements that will improve the appeal of the area to visiting clients.

The staff is around 50% local to the area and the business operates on typical weekday working hours. The business receives daily small-scale deliveries, but this expands to larger HGVs deliveries of clothing stock during busy periods throughout the year.



F6S

Address: Queens Yard, White Post Lane
Business: Start-up platform
Workspace: Small industrial space
Employees: 25

F6S is an internationally-acclaimed independent business that supports a community of 800k individual start-ups and more than 10,000 start-up programs globally.

The business's 25 employees work from an industrial unit in Queens Yard which has been converted to suit their more desk-based operations.

F6S, founded in 2011 successfully moved out of a workspace at 90 Main Yard early in 2017. They grew too big for the shared workspace and actively sought to stay in the Hackney Wick area. The business recruits successfully through word-of-mouth and finds the LLDC area ideal to attract talent. 70% of their employees reside in the growth boroughs and everyone commutes either by bike or public transport.

F6S expects to expand slightly over coming years as their Hackney Wick site continues to grow as their HQ. The space they have found allows them to do so with relative ease.



Hackney Wick Boulder Project

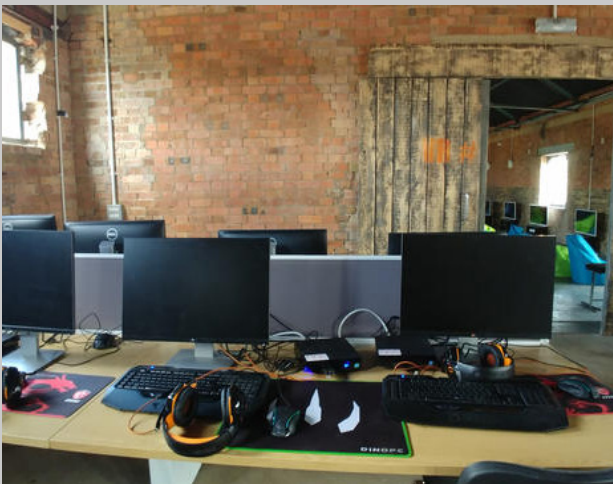
Address: Wallis Road
 Business: Climbing space & cafe
 Workspace: Small industrial space
 Employees: 3

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 cafe space, which is supplied by a number of local food & drink manufacturers. The climbing space includes commissioned artworks from well-known local artist 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.



Exp Leisure

Address: Swan Wharf, Dace Road
 Business: Gaming & events space
 Workspace: Small industrial space
 Employees: 20

Billed as 'the biggest gaming venue in London', Exp Leisure was founded in 2015 by a local resident. The business has been operating from its current premises for less than a year. The founder reports that the business's

offer fits in well with the narrative of the Queen Elizabeth Olympic Park and other leisure uses in the area.

At present the business is operating on a short-term lease the Swan Wharf building, which is shared with a number of artists and SME businesses in small workshop and office spaces across different floors. 80% of Exp Leisure's employees are locally-based and most take public transport to work. The space is open seven days a week and is typically operational up until 11pm. Customers (gamers and other event attendees) come from across London as well as from the UK and even Europe.

The pricing and available workspace was a key draw for the founder, allowing him to test out the viability of this new business. The business is expecting both its staffing and space needs to increase over the next year. The business is considering its next move and is looking to Hackney or Stratford for its next location. Ideally the business would like to be near a transport interchange as it has found access and transport links to their current location to be their biggest challenge.



Chewy Moon

Address: Atlas Wharf, Berkshire Road
 Business: Snack boxes for children
 Workspace: Small industrial space
 Employees: 7

Chewy Moon moved to the LLDC in late 2017 and have been operating from their current premises for just one month. The business moved from North-west London where the independent business was first established

in 2015. The business currently produce 300 boxes of healthy snacks for children in a given week. The company works from a small industrial space which has been delivered through the sub-division of a larger industrial unit in Atlas Wharf. Their location enables them to take daily deliveries by van and large monthly deliveries by truck. The larger industrial unit is shared by brewers, a photo-booth manufacturing workshop and an organic wine company.

Chewy Moon currently employ seven people across both production and administrative functions and are already looking to expand locally, seeking both administration and production space as they grow. The business is considering how it might grow its production and office functions into separate, but preferably nearby, workspaces.

Along with accessibility, Chewy Moon has found the affordability of space and start-up culture in the areas has been key to their business success. Basic amenities, like more lunch options for staff, are considered to be one of the key strengths missing from the area.



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 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 Here East development.

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



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 8000 people engage with Stour Space in any given month.

95% of people working on the site live locally (within the 5 growth boroughs) and the board of directors is majority female and includes BME representation.

Stour Space is currently without a secure long-term leasehold, leaving the multiple businesses operating from and supported by the site vulnerable to change. In the context of redevelopment across Fish Island, partnership working with the local authority, with respect to licensing and business support measures, is highlighted as important.



Newham Music Trust

Address: Stratford Business Centre, Burford Road
 Business: Community music charity
 Workspace: Small office space
 Employees: 8

A registered charity established in 1960 and supported by funding from the Department of Education and Arts Council England, Newham Music Trusts worked with over 15,000 young

people in 2017. Partners have included London Symphony Orchestra, Academy of St Martin in the Fields, The Barbican Centre, Guildhall and Spitalfields Music.

Their small office space in Stratford Business Centre has provided space for eight supporting staff over the last two years and serves as a hub for the 40 teachers they support in schools across the local borough of Newham.

The available transport links are ideal for travelling to local schools. The trust has aspirations for a building of their own locally, as the organisation has moved around a lot over its life, and used to be in East Ham for over 20 years. They expect to have to move again from this leasehold site as they have been told the building is being redeveloped.



Here East

Address: Queen Elizabeth Olympic Park
 Business: Workspace provider
 Workspace: Mixed
 Employees: 2,200 (estimated)

Here East 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 Here East across the 1.2 million sq. ft. of workspace, with secure long-term leases.

Both Loughborough University and UCL have established satellite campuses at Here East. 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 Here East. Studio Wayne McGregor, with around 20 full-time staff, provides 1,600m² of creative arts space. This includes three dance studios, two of which are the largest in London. 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. The BT studios provide production services for all BT Sport content and creative media enterprises have grown up around it.



SPACE Studios - Britannia Works

Address: 43-45 Dace Road
 Business: Artists' Studios
 Workspace: Workshops
 Employees: 74 Artists

SPACE is a leading visual arts organisation providing creative workspace, advocacy, support and promoting innovation. Established by artists in 1968, SPACE runs 19 artist studio buildings across London

and beyond. They supply creative workspace as well as support programmes for artists, such as exhibitions, residencies, bursaries and training opportunities. SPACE also delivers Learning projects for schools, young people and neighbouring communities.

The Britannia Works building is one of SPACE's oldest sites, having been run by them for 37 years. The building hosts 74 artists in 62 distinct workspaces and provides a home for the London Centre for Book Arts. SPACE hold the building on a leasehold agreement that is due to expire over the next decade and charge artists an average of £300 per month for a studio.

Across the road is Bridget Riley Studios, also managed by SPACE, hosts another 49 artists. Behind Britannia Works is the Peanut Factory, a complex of live-work units which host a range of creative sector tenants and SMEs. In each case, the old industrial building stock has been successfully re-purposed over time to accommodate creative activities, thanks to features like large windows, high ceiling heights and yard spaces that have been brought back into productive use.



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 by 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.

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