

Lewisham Creative & Digital Industries Study

Baseline Report



November 2017

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Developed by:



REGENERIS

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 WE MADE THAT
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tom fleming / creative consultancy

Overview

Regeneris Consulting, We Made That and Tom Fleming Consultancy have supported LB Lewisham to produce a study which provides the borough with a better understanding of creative and digital activity in the borough. This includes an assessment of emerging opportunities and areas of interest, as well as an action plan for supporting the sector in the future.

This evidence base is the first part of this study, providing detailed insight into Lewisham's existing CDI economy and which neighbourhoods within the borough have the most potential for growth in the future.

Methodology

The evidence base has been developed in the following way:

1. Background information has been reviewed to ensure that this research builds upon existing Lewisham and London evidence.
2. Statistical mapping and analysis has been undertaken to gain a granular understanding of CDIs across Lewisham, with key clusters of activity identified and examined.
3. Building upon the statistical analysis, a review of the Lewisham property market was undertaken, to understand if this is impacting on the development of the sector.
4. To provide a more 'real time' view, 'ground level' research has been undertaken in the key clusters of activity, to investigate the health of the sector and to understand the conditions which support sector operation.
5. To supplement baseline statistics, engagement has been undertaken with CDI businesses, to develop a richer understanding of current activity in Lewisham.

Methodology

The mix of creative and digital activity in Lewisham provides a unique ecosystem, with both sectors often complementing each other.

- **Creative:** includes a range of creative activities including publishing, broadcasting, architecture, design and performing arts. The DCMS definition has been used to define this, with the addition of fashion manufacturing, which better reflects the type of creative activity taking place in Lewisham based on observational research.
- **Digital:** includes components such as e-commerce/e-business and supporting infrastructure (including hardware, software and telecoms) . Increasingly the sector is blending into other sectors of the economy, and so businesses may not be described as digital (in the data), but may employ staff in a role that would be considered as digital, and vice versa . It tends to be that official statistics underrepresent the size of this sector, however for the purposes of this study, we have chosen the DCMS definition of the creative (and digital) sector.
- **Creative and digital overlap:** this ‘grey’ area of the sector is becoming increasingly common as digital innovation infiltrates traditionally creative activities, and leads to new ideas. Emerging trends include graphic design, and augmented & virtual reality.

This analysis covers both sectors together, with sub-sector specialisms of the creative and digital sectors also analysed in the full version of the evidence base.

The London Context

This Creative and Digital Industries Growth Strategy comes at an important time for the sector in London. The Mayor of London has recently confirmed that the sector is one of his top priorities in the emerging Economic Strategy. Other key policy aspirations of the Mayor within Creative and Digital Industries includes:

- The Cultural Infrastructure Plan identifies what London needs to sustain and develop creative and cultural industries, through a better understanding of what is happening in London and where the value lies.
- The Mayor has also pledged to increase access to affordable space for artists and creatives and made a manifesto commitment to establish defined geographical areas in London as Creative Enterprise Zones. These will offer a tailored package of incentives to secure the future of artists and creative workspace and cultural facilities and enable artists and creatives to put down roots in their communities.
- The Mayor has launched plans to develop a Smart London Plan, which will set out the Mayor's ambitions to harness new technologies being pioneered in the capital to transform London into one of the world's leading smart cities.

Why Lewisham, Why Now?

Lewisham is home to one of London's emerging clusters of Creative and Digital activity, which is starting to shape the economic development of the borough. The presence of Goldsmiths University (specializing in arts and design) at New Cross provides a source of highly talented creative graduates, some of whom provide the basis of the Creative sector in the borough. With an increasing focus on digital activities it is hoped that Goldsmiths can play a fuller role in supporting CDI activities in Lewisham and London in the future.

Other developments within Lewisham also present a significant opportunity for the development of the Creative and Digital sector. Improvements in transport (East London Line, and Bakerloo Line Extension) and housing (North Deptford) alongside strong education and networks will all help to create the right set of conditions for the sector's future development.

There is however, a time limited opportunity in a competitive market. To capitalize, Lewisham needs a strong partnership response.



Creative & Digital Activity in Lewisham Today

What Creative & Digital Activity is currently taking place in Lewisham?

Defining Creative & Digital Industries in Lewisham

The Creative and Digital sector encompasses a diverse range of industries, with activities occurring across a wide range of businesses. This has traditionally made the sector very difficult to define, with a lack of reliable and universally understood data¹.

The most widely used definition of the Creative and Digital economy is published by the Department for Culture, Media and Sport (DCMS). This defines 13 sub-sectors including performing arts, film, advertising and software². Although this captures a most relevant activities, a number of other 'Creative & Digital' occupations are not captured within the data, particularly, where they are employed within a 'non-creative/digital' firm (e.g. graphic designer employed by a financial firm). However, this is the most widely recognised definition, and so has been used for the purposes of this study.

Our initial analysis of the sector using the DCMS definition did however observe that certain sub-sectors which primary research uncovered as being prominent within Lewisham were also not included in the definition. 'Fashion Manufacturing' specifically is not included in the DCMS definition, so for the purposes of this study this was added to better reflect Creative & Digital activity within Lewisham.

¹ British Council, *New and changing dynamics; What is the Creative Economy*

² See Page 14 for a list of all sub-sectors

Summary: What the Statistics Tell Us

Lewisham's Creative and Digital Industries



3,800 people employed



2,360 active businesses



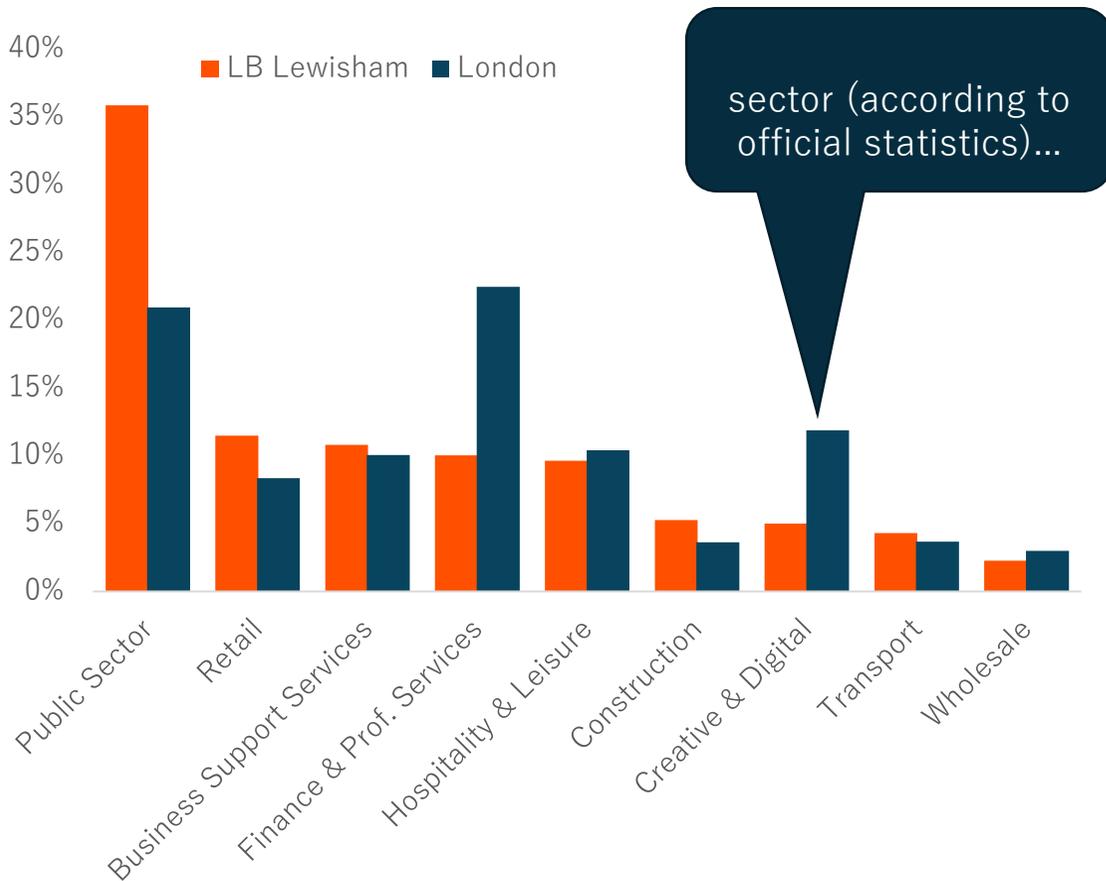
21% of all businesses in creative and digital activities.



+71% (+1,580 jobs) employment growth in last 5 years

Sector Size

Proportion of total employment by sector (largest sectors shown), 2016



sector (according to official statistics)...

Statistics suggests that the sector is still relatively small in Lewisham. Compared to other sectors, the proportion of employment in CDIs appears low, particularly when compared to other sectors and London.

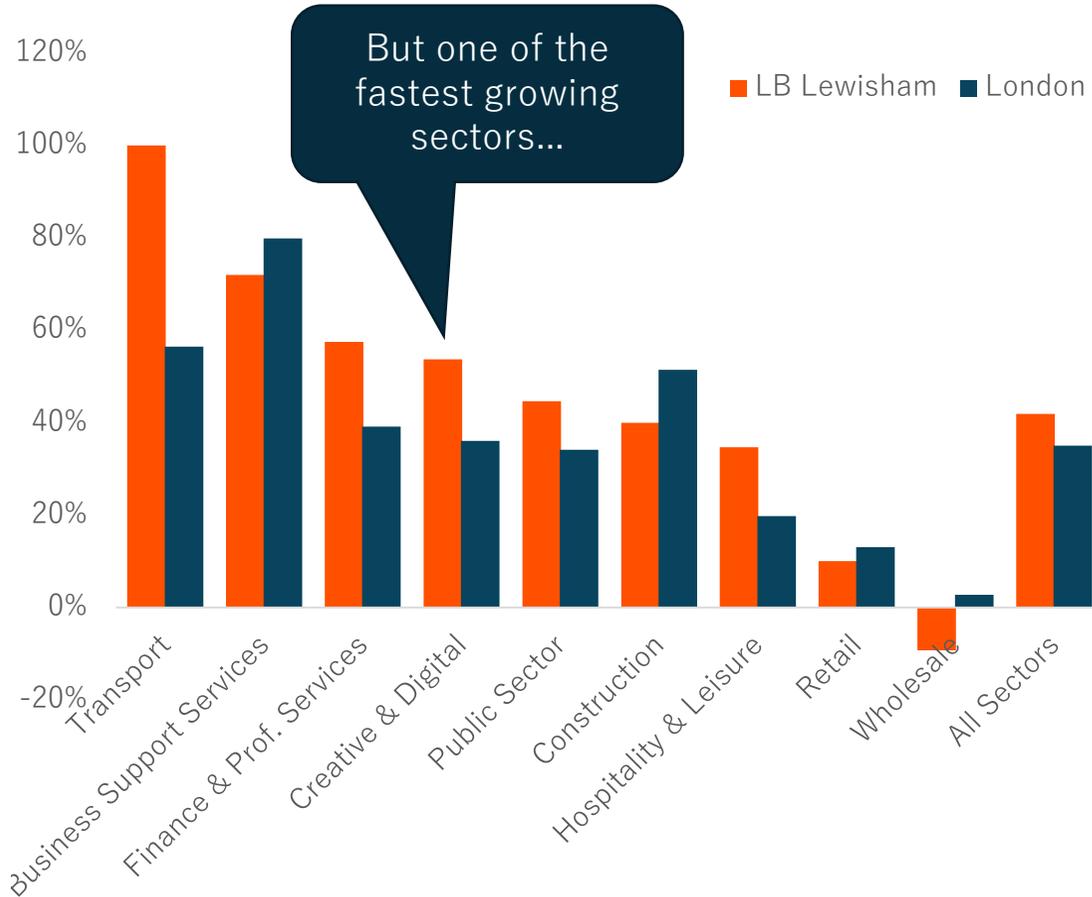
The sector is currently the seventh largest in Lewisham, with the **public sector** and **retail** the largest.

Based on previous studies and observations, it is important to note that government statistics often **underestimate the size of the CDI sector** by a considerable margin. Official statistics do not capture the smallest businesses with lower turnover or those which are more transient (which it is reasonable to assume includes a number of CDI businesses in Lewisham).

Source: BRES, ONS, 2016

Recent Business Growth

% Change in Number of Businesses (largest sectors shown), 2012-17



Lewisham’s CDI sector is **growing at a rapid rate, outpacing growth** in the sector across London.

It is Lewisham’s **fourth fastest growing sector** over the last five years, with a 54% increase.

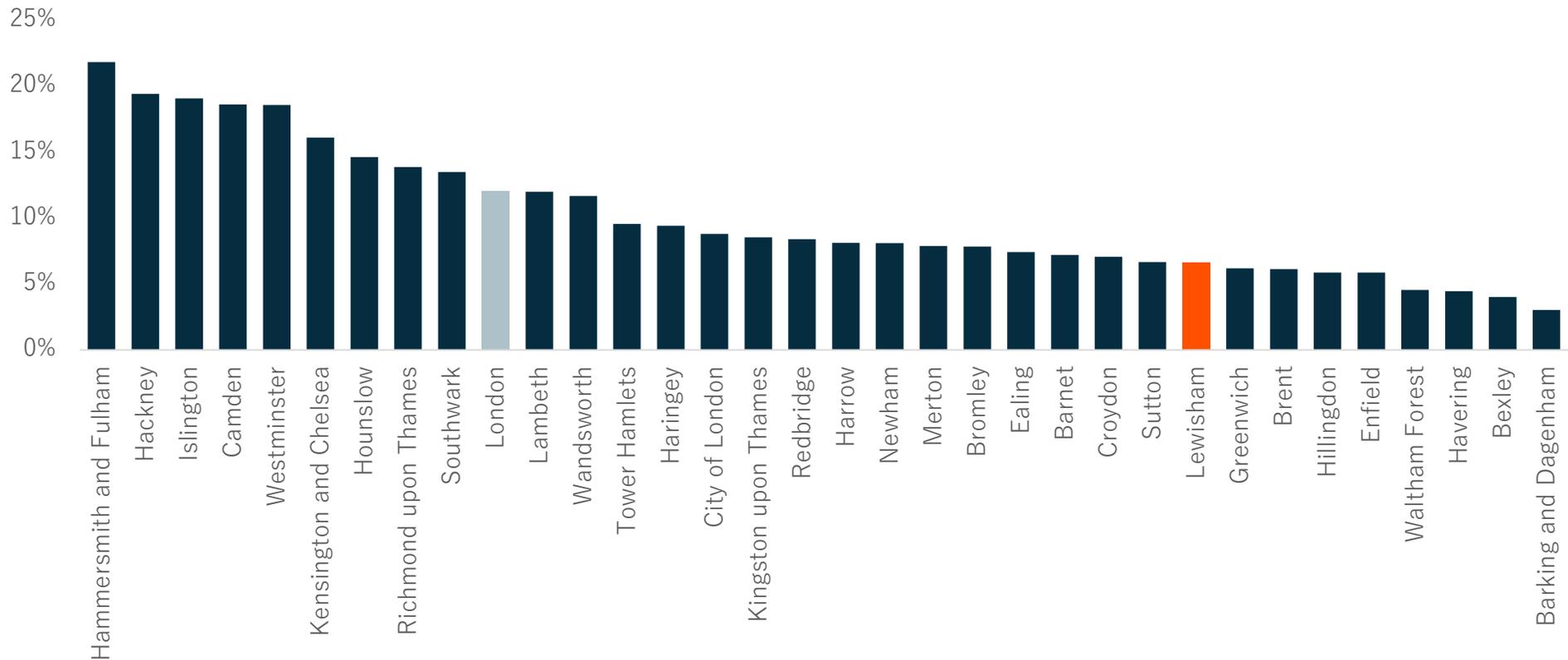
Many of the fastest growing sectors within Lewisham are among the **most productive**, including CDI (£100,000 GVA per FTE worker), finance & professional services (£178,000) and construction (£112,000).

Source: UK Business Count, ONS, 2017

Lewisham vs. Competitor Areas

Compared to other borough's the proportion of CDIs in the economy is **low** (25th in London).

% Employment in Creative & Digital Activities, 2016

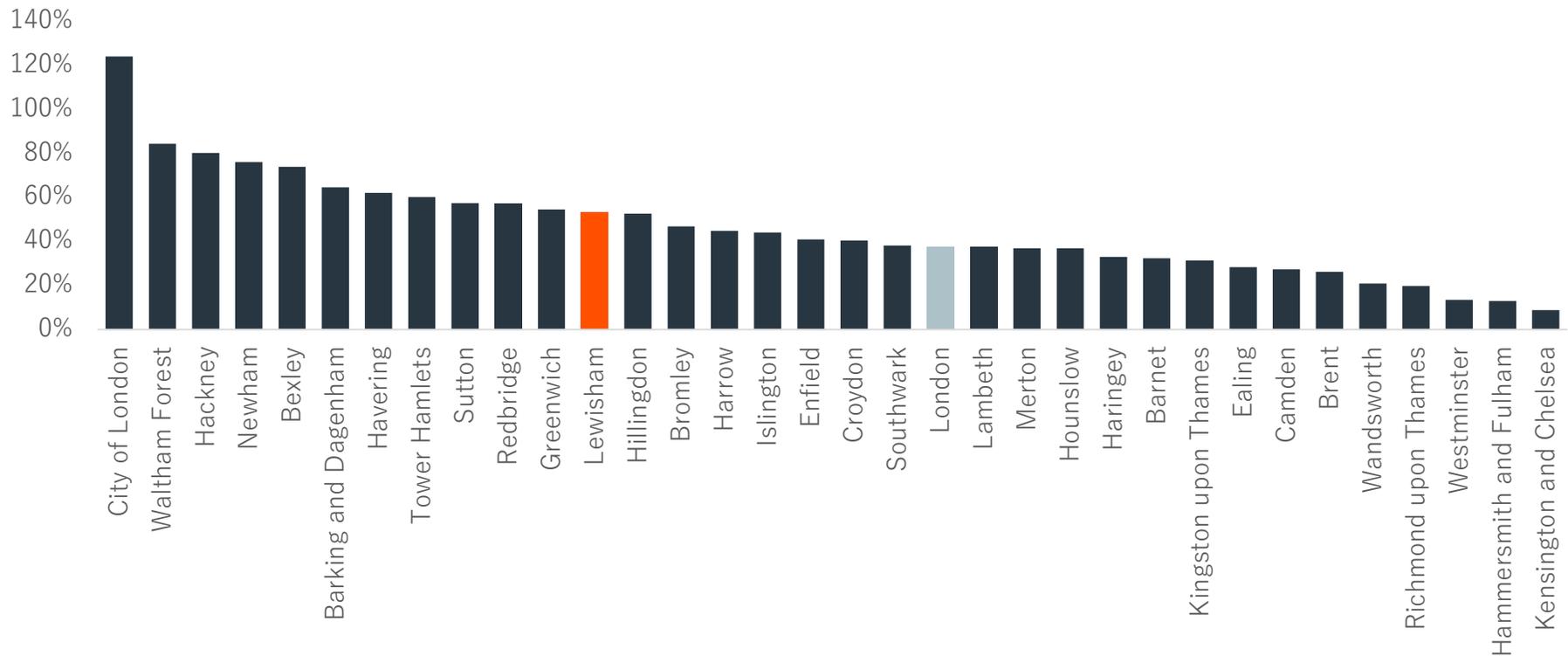


Source: BRES, ONS, 2016

Lewisham vs. Competitor Areas

Lewisham's Creative and Digital economy is **growing faster than London as a whole**. Recent business growth is greater than boroughs with noted Creative & Digital economies, including Southwark and Islington.

% Change in Creative & Digital Businesses, 2012-17



Source: UK Business Count, ONS, 2017

Sub-Sectors

Creative and Digital Sub-sector	Duedil, 2017		UK Business Count, 2017	
	Businesses	% Total	Businesses	% Total
IT, software & computer services	760	33%	990	42%
Music, performing & visual arts	540	24%	400	17%
Film, TV, video, radio & photography	350	15%	390	16%
Advertising & Marketing	200	9%	150	6%
Publishing	150	6%	90	4%
Design	120	5%	210	9%
Architecture	80	4%	90	4%
Fashion Manufacturing	80	4%	30	1%
Crafts	10	0%	10	0%
Museums, galleries & libraries	10	1%	20	1%
CDI Total	2,300	100%	2,360	100%

Analysis of Lewisham's CDIs reveals a **number of specialisms**, which have created a **unique sector** within the borough.

To enable more accurate coverage, two different sources of business data have been used to understand the number of CDI businesses in Lewisham

- **Duedil** data, draws on Companies House data, which tracks business registrations across Lewisham (and usually provides a more comprehensive view of activity)
- **UK Business Count** uses information on VAT traders and PAYE employers to estimate the number of businesses. This data often fails to capture the smallest businesses, who aren't VAT or PAYE registered.

Source: UK Business Count, ONS, 2017 & Duedil, 2017

Digital Sub-Sectors

Digital Sub-Sector Specialisms in Lewisham

Sector	Detail	Employment			Business
		No	LQ*	Change 2011-16	No.
Digital Services	Operation of websites and search engines	20	0.1	0%	20
Digital Consulting	Planning & design of computer systems	1,300	1.3	+30%	870
Digital Publishing	Publishing of computer games & software	30	0.8	+25%	10
Hardware Manufacturing	Manufacture, repair and assembly of computers	60	1.4	+38%	30
Software Development	Development, production of software	310	0.9	+22%	200
Tele-communications	Operating, maintaining or providing access for telecommunications	140	0.5	-31%	40
Digital TOTAL		1,840	1.0	+21%	1,150

A wider interpretation of the Digital sector (as defined by the ONS), finds that there are around **1,800 people** working in Lewisham's Digital sector.

Digital consulting accounts for around 70% of Lewisham's employment in the Digital sector, and is more concentrated in Lewisham than across London.

Software development and telecommunications are also large sub-sectors within Lewisham's digital economy, however they are all less specialized in Lewisham relative to London as a whole.

Source: UK Business Count, ONS, 2017 & BRES, ONS, 2016

*=LQ = specialisation relative to London's Digital Sector

Using TechNation Definition for Digital Sector



Geography of Creative & Digital Activity in Lewisham

Where is Creative & Digital Activity currently taking place in Lewisham?

Creative & Digital Employment in Wards

% Creative & Digital Employment & Businesses by Lewisham's Wards

	Employment (2016)	Businesses (2017)	Business Growth (11-16)	Employ. LQ vs London
			Absolute	
Bellingham	150	65	+50	0.3
Blackheath	225	175	+50	0.4
Brockley	350	205	+140	0.7
Catford South	150	100	+75	0.4
Crofton Park	225	210	+100	0.8
Downham	50	45	+6	0.2
Evelyn	150	100	+50	0.5
Forest Hill	225	195	+54	0.9
Grove Park	100	65	+75	0.6
Ladywell	150	140	+75	0.9
Lee Green	225	155	+75	0.8
Lewisham Central	200	190	+29	0.2
New Cross	200	130	+80	0.3
Perry Vale	175	165	+100	1.0
Rushley Green	75	70	+15	0.1
Sydenham	200	130	+75	0.8
Telegraph Hill	200	165	+125	0.7
Whitefoot	40	35	+15	0.3



Source: BRES, ONS, 2016 & UK Business Count, ONS, 2017

Employment in Key Centres

Advertising and Marketing



Architecture

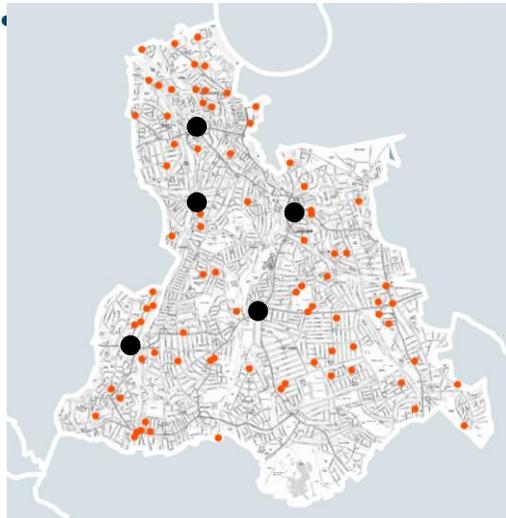


Crafts

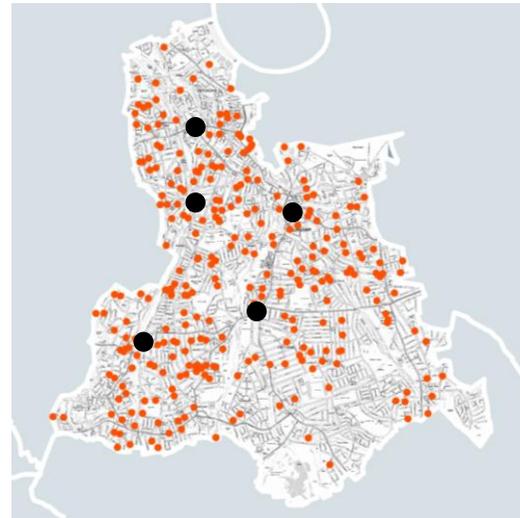


- Town Centre
 - New/Cross Deptford
 - Brockley
 - Lewisham TC
 - Catford
 - Forest Hill
- (From top to bottom)

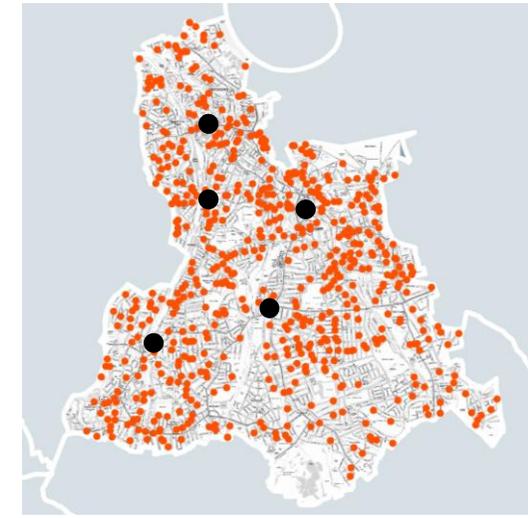
Fashion Manufacturing



Film, TV, Video, Radio & Photography



IT, Software & computer services

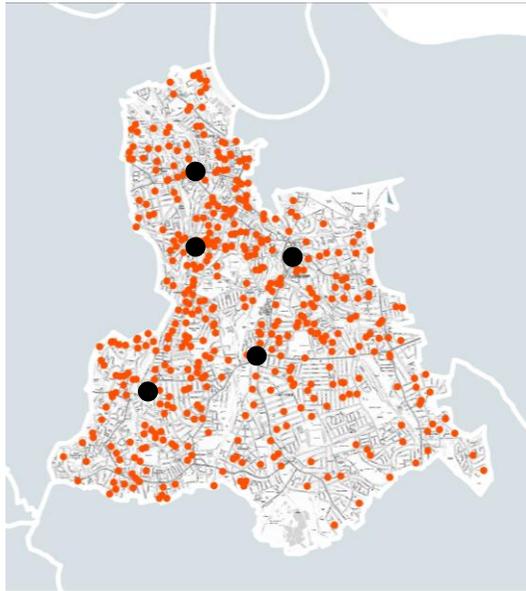


Each orange dot represents one business

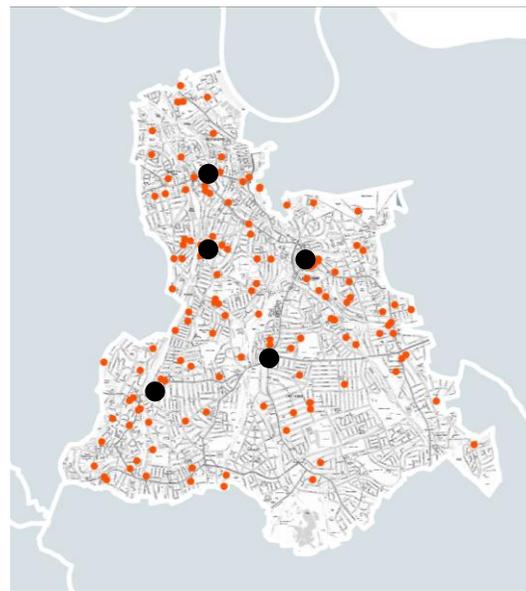
Source: Duedil, 2017

Employment in Key Centres

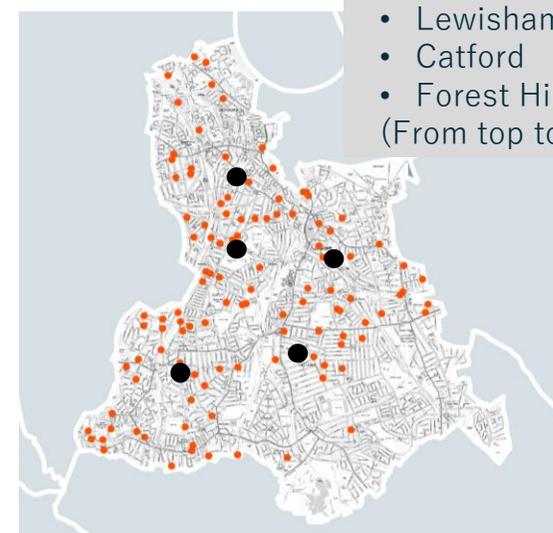
Music, performing and visual arts



Publishing



Design



- Town Centre
 - New/Cross Deptford
 - Brockley
 - Lewisham TC
 - Catford
 - Forest Hill
- (From top to bottom)

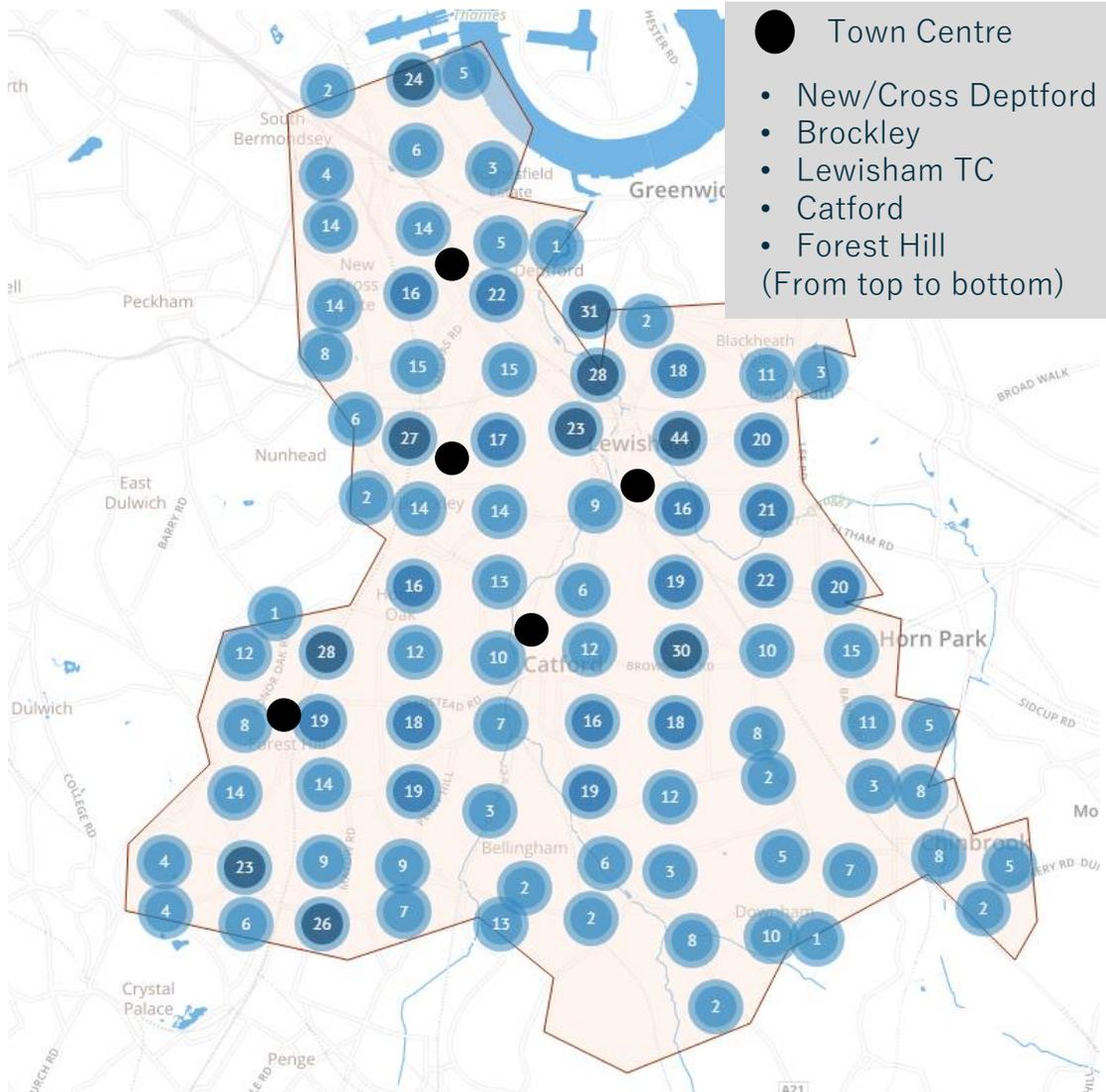
Each orange dot represents one business

Activity within the CDI sector is **relatively well spread across Lewisham**, with concentrations of activity around the **main town centres** (New Cross, Deptford, Lewisham, Catford and Forest Hill) and **towards the north of the borough**.

Source: Duedil, 2017

Employment in Key Centres

Location of Digital Technologies Businesses



Data from Tech Map London (supported by the Mayor of London and London Enterprise Panel), shows the location of ‘Digital Technologies’ businesses in Lewisham.

This shows a **strong clustering of activity** around **Forest Hill, Lewisham Town Centre and Deptford**.

Lewisham has fewer ‘Digital Technologies’ businesses than several neighbouring and comparator boroughs.

Borough	Number of Digital Technologies Businesses
Lewisham	1,400
Greenwich	1,570
Hackney	2,560
Southwark	2,780
London	90,900

Growth in Key Centres

Town Centre	Employment (2016)	Businesses (2017)	Employment Growth (2011-16)	Business Growth (2012-17)
New Cross & Deptford	770	270	+164%	+125%
Brockley	370	250	+118%	+81%
Lewisham Town Centre	315	190	+50%	+58%
Forest Hill	650	450	+53%	+73%
Catford	100	55	+150%	+120%
Lewisham	2,900	1,850	+71%	+62%
<i>London</i>	<i>476,000</i>	<i>96,000</i>	<i>+34%</i>	<i>+40%</i>

Consultations with council officers and local stakeholders shortlisted a number of town centres, which were believed to have larger amounts of Creative & Digital activity. Of these, the **four largest CDI town centres** were **New Cross & Deptford, Brockley, Lewisham Town Centre and Forest Hill**.

Each of these has been interrogated further in later sections of this report, to get a fuller understanding of the specific nature of CDI activity taking place.

Source: BRES, ONS, 2016 & UK Business Count, ONS, 2017

Observing Creative & Digital Enterprise in Lewisham

GROUND-LEVEL ANALYSIS

Identified clusters of creative & digital activity

Identified clusters for analysis

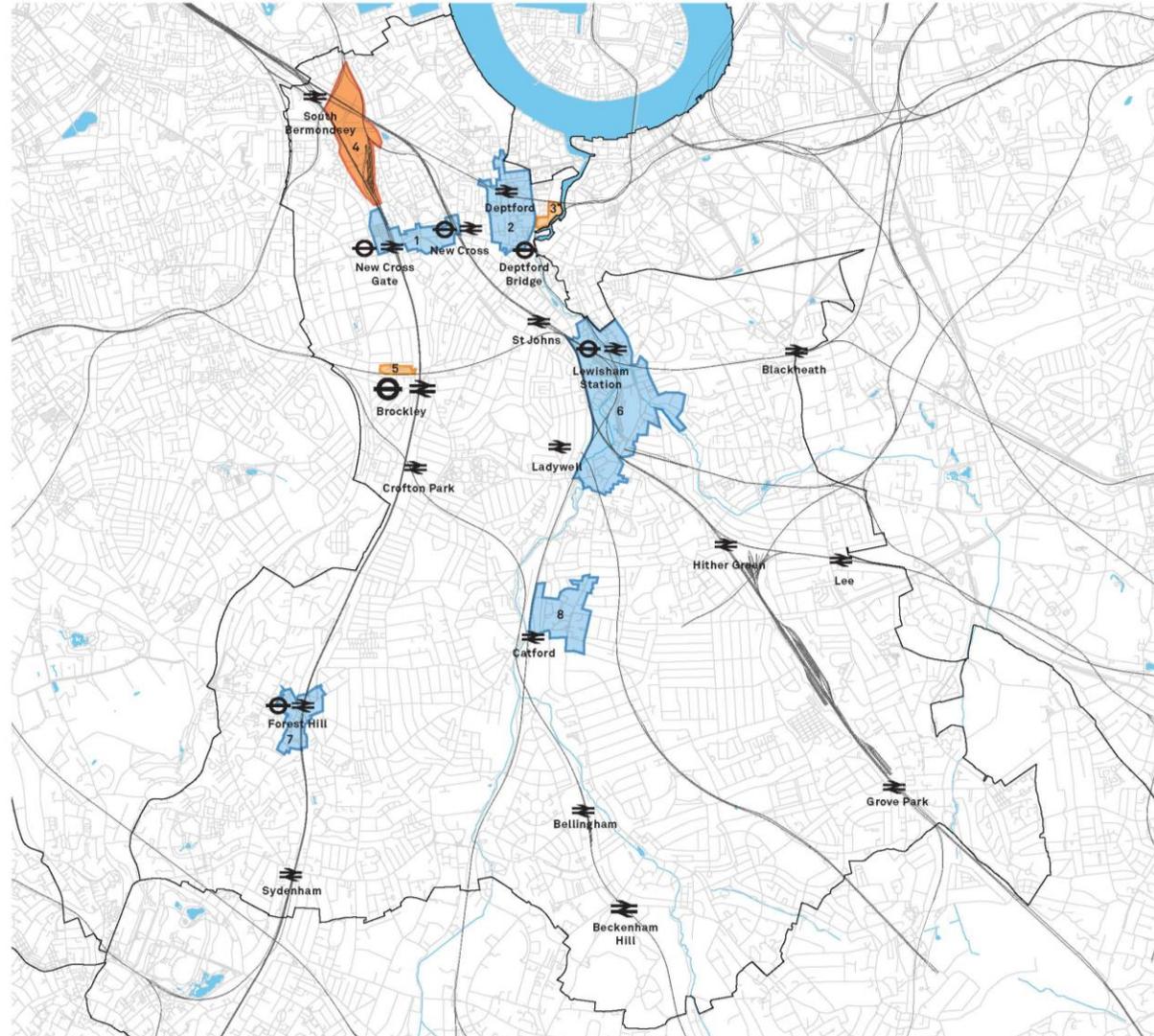
1. New Cross Gate
2. Deptford High Street
3. Creekside
4. Surrey Canal
5. Brockley
6. Lewisham Town Centre
7. Forest Hill

Additional identified clusters

8. Catford

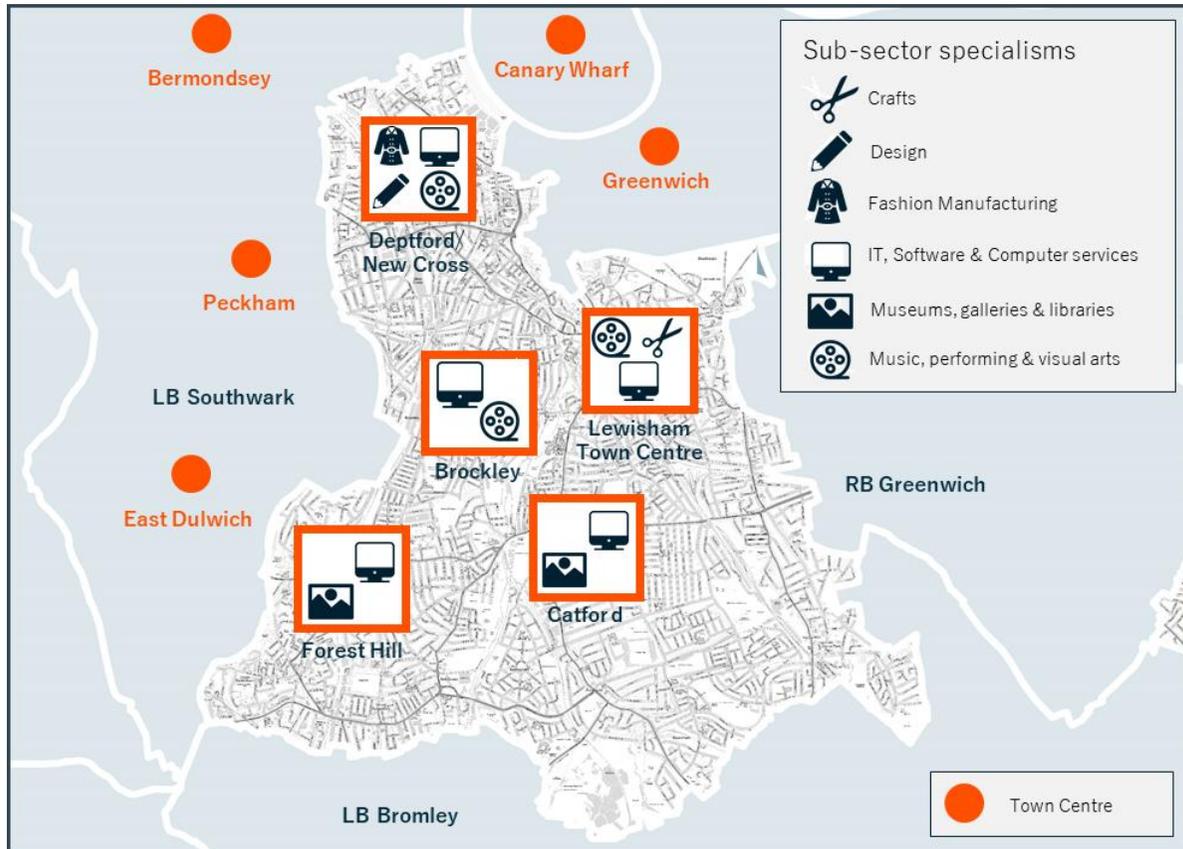
Policy designations relevant to clusters

- Strategic industrial land (SIL)
- Local Employment Area
- District and Major Town Centres
- LB Lewisham borough boundary



Creative & Digital Sub-Sectors

Town Centre Sub-Sector Specialisms



Each of the four town centres which has been analysed in more detail to understand the key sub-sector strengths within each one. These have been determined by either a strong concentration of business and employment activity.

Each town centre has a very different dynamic,

- **Deptford/New Cross:** arts and fashion; design; film & music; and IT.
- **Lewisham:** crafts and galleries; design; and IT.
- **Brockley:** film & music; and IT.
- **Forest Hill:** IT, and museums.
- **Catford:** museums and galleries; and IT.



Foundations for Creative & Digital Growth

Does Lewisham have the infrastructure to support the development of Creative & Digital Industries?

Potential of Digital Sector

The Digital Sector in Lewisham is currently **small**. Key to its future growth will be its **ability to adapt and play a bigger part of London’s Digital economy**. There are a number of emerging sub-sectors within the digital sector, for which Lewisham’s current position and future potential has been examined.

Sub-Sectors	Description	Current Lewisham Position
Medical Technology (MedTech)	The convergence of health care, digital media and mobile devices can massively improve the way health and social care are delivered. Interconnected health systems can be developed to aid health care professionals and empower patients to manage illnesses and health risks, as well as promoting health and wellbeing.	There is no evidence of a significant cluster in Lewisham at the moment, although there are a few firms operating (e.g. Cytosight Ltd). The presence of a large hospital (University Hospital Lewisham). This provides a platform for the development of the sector in the future.
Digital Marketing	Digital marketing is fast becoming one of the largest marketing industries, and is the marketing of products or services using digital technologies (e.g. the internet, mobile phones and display advertising). Innovations include search engine optimisation, social media marketing, online marketing and data-driven marketing.	There is some evidence of this sector already existing in Lewisham, with examples including Studio Raw. This evolution of design and media courses offered at Goldsmiths University, will strengthen this in the future, potentially supporting future growth.
FinTech	Fintech is a new financial industry that applies technology to improve financial activities. The use of smartphones for mobile banking are examples of making finance more accessible to the public.	There is no evidence of significant activity within this sector in Lewisham, although its good transport connections to Canary Wharf (especially from Lewisham Town Centre). There could be opportunities to connect to these markets.

Entrepreneurial Environment

Entrepreneurial Environment in Lewisham

Indicator	Value	Decile Rank <i>(1st = best, 10th = worst)</i>
% Working Age Population working in SMEs	18.4%	10 th
Productivity of SME businesses	£79,900	9 th
Number of Scale-Ups (businesses with 20% employment growth over 3-year period)	35	6 th
Number of New Businesses Started, 2016	2,600	2 nd
Venture Capital Investment	£6.33m	3 rd
Total Early-Stage Entrepreneurial Activity (TEA) (% of Working Age Population about to start/have already started an entrepreneurial activity)	6.9%	4 th
5 Year Business Survival Rate	39.6%	6 th

Source: Nesta, *The State of Small Business, 2017*

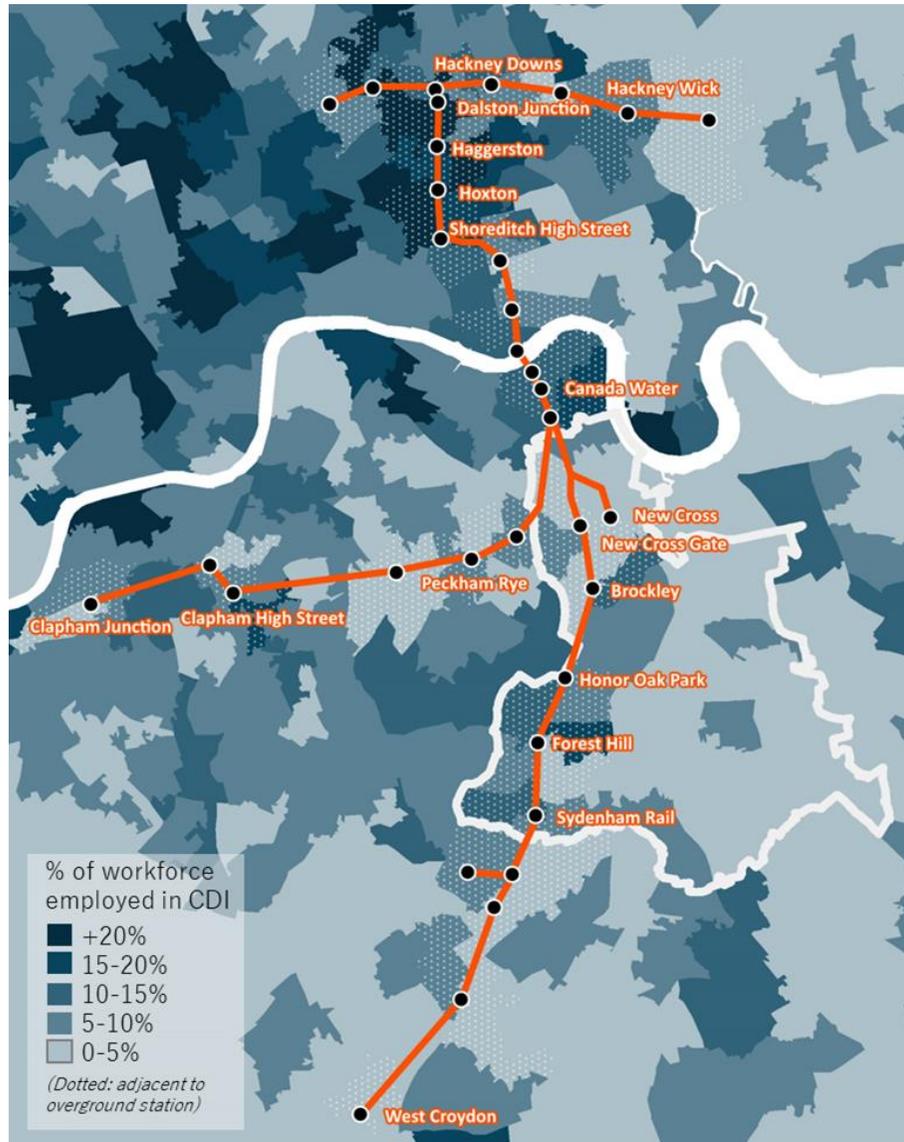
Note: Decile has been estimated from scale rank

Analysis from Nesta on ‘The State of Small Business in the UK’ found that Lewisham’s current entrepreneurial environment is **not as welcoming as others in London**.

SMEs within Lewisham typically have relatively **low productivity** compared to other local authorities nationally, and there is a very **low proportion of the working age population currently working for SME businesses**.

However there is **good access to venture capital investment** in the area, and Lewisham has one of the **highest number of businesses started** in the last 12 months.

Transport Connections



One of the fundamental factors for enabling the development for the CDI sector is **good transport connections**. This enables Lewisham to link to the markets and workforce which drives the London sector.

This is particularly true of the **East London Line/ London Overground**. Analysis of CDI activity line, shows established and emerging concentrations of activity on the route to Shoreditch (Tech City), Hackney and Dalston.

These connections (alongside future connections to the West End as a result of the Bakerloo Line Extension), will help to **fuel growth in the CDI sector in Lewisham in the future**.

Commercial Property

Lewisham has relatively **cheap rental values** compared to London, although these have been increasing over the last five years at a faster rate than in London as a whole.

One constraining factor for the development of the CDI sector is the **lack of vacant units** in Lewisham, with only 3% of industrial and 5% of office currently vacant. This poses a challenge in providing space for CDI businesses at all stages of their development (start-up to mature), and is something which needs to be addressed to support future development of the CDI sector.

Average Rental Values and Vacancy Rates, 2016

		Rental Values		Vacancy	
		Average Rent (£/sqft)	% Change (2011-16)	% vacant units	% Change (2011-16)
Lewisham	Office	£18	+63%	5%	-21%
	Industrial	£8	+34%	3%	+48%
London	Office	£48	+44%	6%	-22%
	Industrial	£10	+34%	3%	-54%

Note: All values rounded to nearest whole number

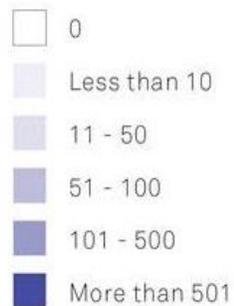
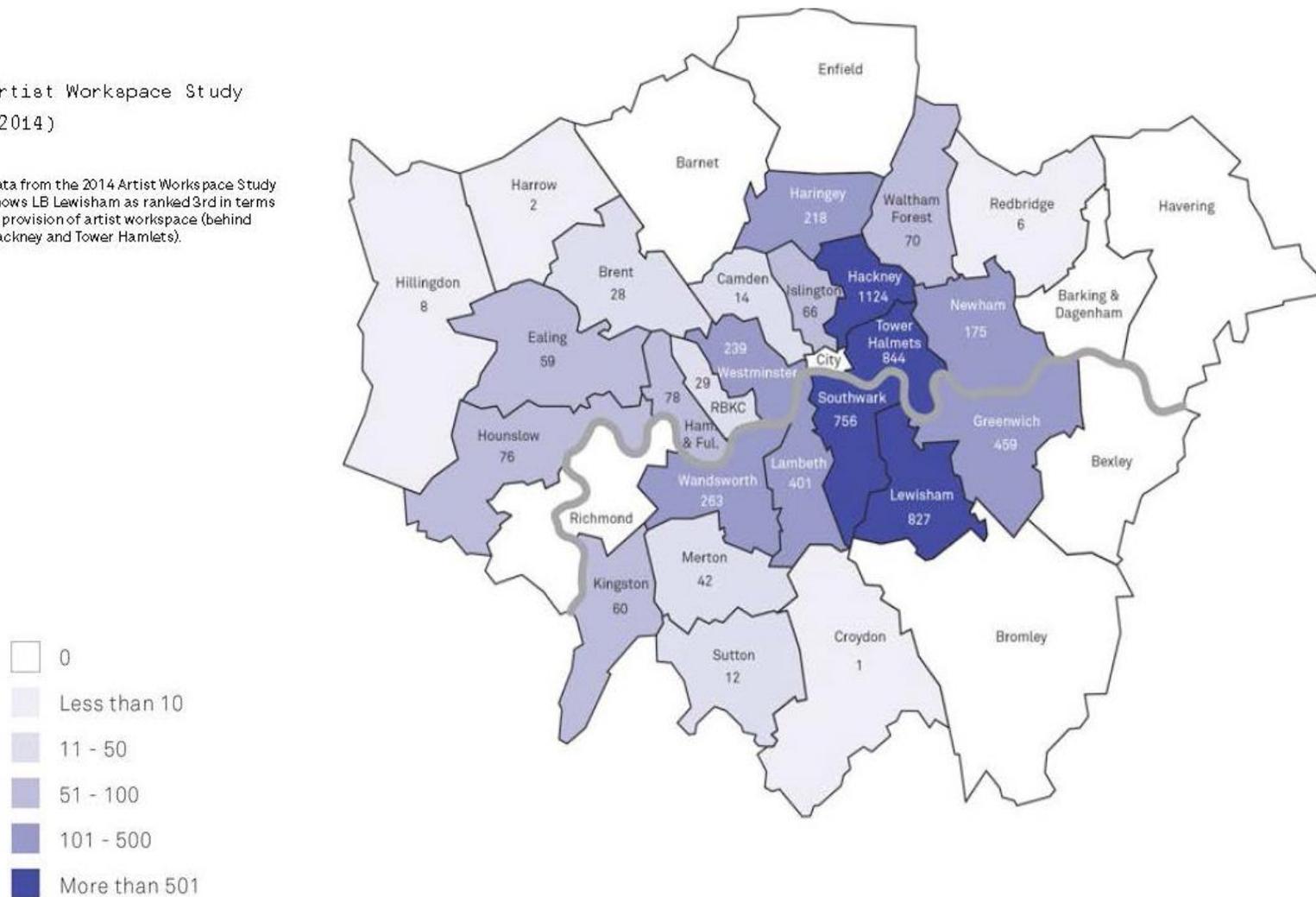
Source: CoStar, 2017

Artists Workspace

Lewisham does have one of the **highest number of artist workspaces** in London.

Artist Workspace Study
(2014)

Data from the 2014 Artist Workspace Study shows LB Lewisham as ranked 3rd in terms of provision of artist workspace (behind Hackney and Tower Hamlets).



Skills

Lewisham has established a **good spread of provision** focused on creative and digital sectors, covering a range of qualifications and skill levels. These include:

Institution	Courses Offered
Goldsmiths University	Art Computing Dance & Performance Design Institute for Creative and Cultural Entrepreneurship Media & Communication Music & Theatre
Lewisham Southwark College	Art & Design IT & Computing Media Music Theatre
Christ the King College, Lewisham	Art & Design ICT & Graphic Communication Media
Informal and Formal Networks	Various provision of education and taster courses

Creative & Digital Skills

To support the development of the Creative & Digital sector, there needs to be the **right mix of Creative & Digital skills available** in the local labour market.

The latest national evidence on the types of skills required by Creative & Digital businesses (Nesta, 2017) has analysed online job advertisements for jobs in the creative sector to uncover the specific skills requirements for creative jobs. The table opposite shows the top 10 skills required within skill clusters.

Lewisham Southwark College and Goldsmiths University already provide a range of courses matching these skills requirements, although there is scope for increasing the supply of these in the borough (e.g. Lewisham Southwark College provide Digital Media courses on their Southwark campus).

Key Skills Requirements with the Creative & Digital Sector (Nationally)

	Tech Skills	Support Skills	Marketing Skills	Creating & Design Skills
1	Microsoft C#	Building Relationships	Social Media	Adobe Photoshop
2	Microsoft Windows	Project Management	Marketing	Graphic Design
3	.NET Programming	Business Management	Marketing Sales	Website Production
4	Software Engineering	Microsoft Excel	Campaign Management	Concept Development
5	Software Development	Business Development	Marketing Communication	Adobe Indesign
6	ASP	Customer Service	Brand Management	Video Production
7	Web Site Development	Microsoft Office	Market Strategy	Adobe Acrobat
8	Extensible Markup La...	Contract Management	Strategic Marketing	Packaging
9	jQuery	Product Sales	Copy Writing	Photography
10	Oracle	Sales	Product Marketing	Brand Design

Source: Nesta, A closer look at Creatives, 2017

Digital Skills

A review of the apprenticeships being offered within the ICT sector provides a good proxy for some of the skills being obtained by Lewisham’s residents at the moment.

According to data from the Department for Education, there were **70 ICT apprenticeship starts in Lewisham** in the 2015-16 academic year, representing a 133% increase on the take up in the 2009-10 academic year. This is a stronger rate of growth than experienced across the rest of London

	Lewisham		London	
	No.	% Change 2009-16	No.	% Change 2009-16
ICT Apprenticeships	70	133%	2,020	53%
All Apprenticeships	1,850	168%	46,280	127%

Business Support

There is a **range of business support provision** available to companies in Lewisham. The table below provides a summary of this, much of which is relevant to the CDI sector:

Reach	Name	Summary of Offer
Lewisham Specific	DEKs	Dek Catford, Dek Ladywell and Dek Deptford (new co-working business spaces) opened in September 2016. The DEKs spaces create high quality, fully furnished and serviced co-working spaces alongside a programme of business support and bespoke consultancy to meet the needs of high-growth potential businesses in the CDI sector.
	Workspace Based support	Offer linked to managed workspace
	Peer to Peer/ Informal Networks	Evidence of large numbers of these taking place in workspaces
Wider Reach	Federation of Small Businesses	Offering small business advice, financial expertise and support
	South East London Chamber of Commerce	Offers advice, information and networking opportunities to North London businesses
	Enterprise for London	Provide business advice, business training and access to finance across London
	Small Business Network	Business networking opportunities in North London
	National Enterprise Network	Membership body representing those in the enterprise support sector across England
	Accountants and Lawyers	Provide business advice and finance support

Evidence so far...

Creative & Digital Activity in Lewisham Today

- Lewisham is home to a **fast-growing Creative & Digital economy**, with its recent development focused around **four distinct locations**: Deptford / New Cross, Lewisham town centre, Forest Hill and Brockley.
- Sub-sectors which are a strength in Lewisham include IT, music & performing arts, film & TV, and advertising & marketing.

Foundations for Growth

- The current provision of CDI skills and business support within Lewisham is good, especially with the recently established DEKs providing sector-specific support to the CDI sector.
- Transport connections (especially along the East London Line) provide good access to existing creative and digital markets
- Lewisham has relatively cheap rental levels compared to London, although there is a lack of available units across many town centres to attract and support CDI businesses. There is already a large amount of artist workspace available in Lewisham – one of the highest in London.

The four distinct locations we have identified will now be examined in more detail to understand the key characteristics that make up each location, and how they contribute towards the creative & digital identity of the borough.



Focus on our Town Centres

What activities are taking place in our town centres?



Focus on...Deptford & New Cross

Business Sectors

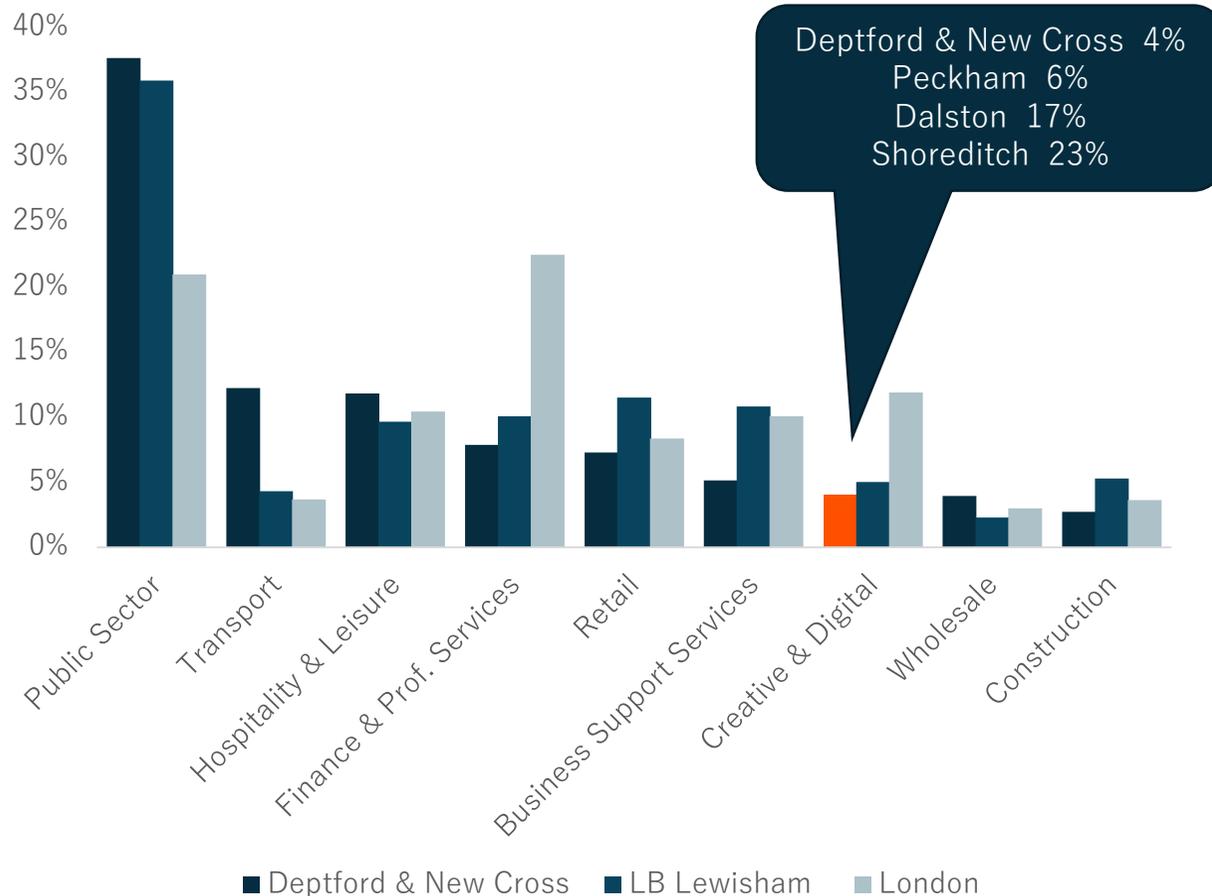
Creative and Digital Sub-sector	Deptford & New Cross		Lewisham
	Total Businesses	% Total	% Total
IT, software & computer services	90	33%	42%
Music, performing & visual arts	65	24%	15%
Film, TV, video, radio & photography	50	19%	16%
Design	40	15%	8%
Advertising & Marketing	15	10%	9%
Architecture	10	4%	0%
Publishing	-	0%	3%
Fashion Manufacturing	-	0%	2%
Museums, galleries & libraries	-	0%	1%
Crafts	-	0%	0%
Total	270	100%	100%

Note: Number of businesses rounded to nearest 5

Source: UK Business Count, ONS, 2017

Employment (by sector)

Proportion of total employment by sector (largest sectors shown), 2016



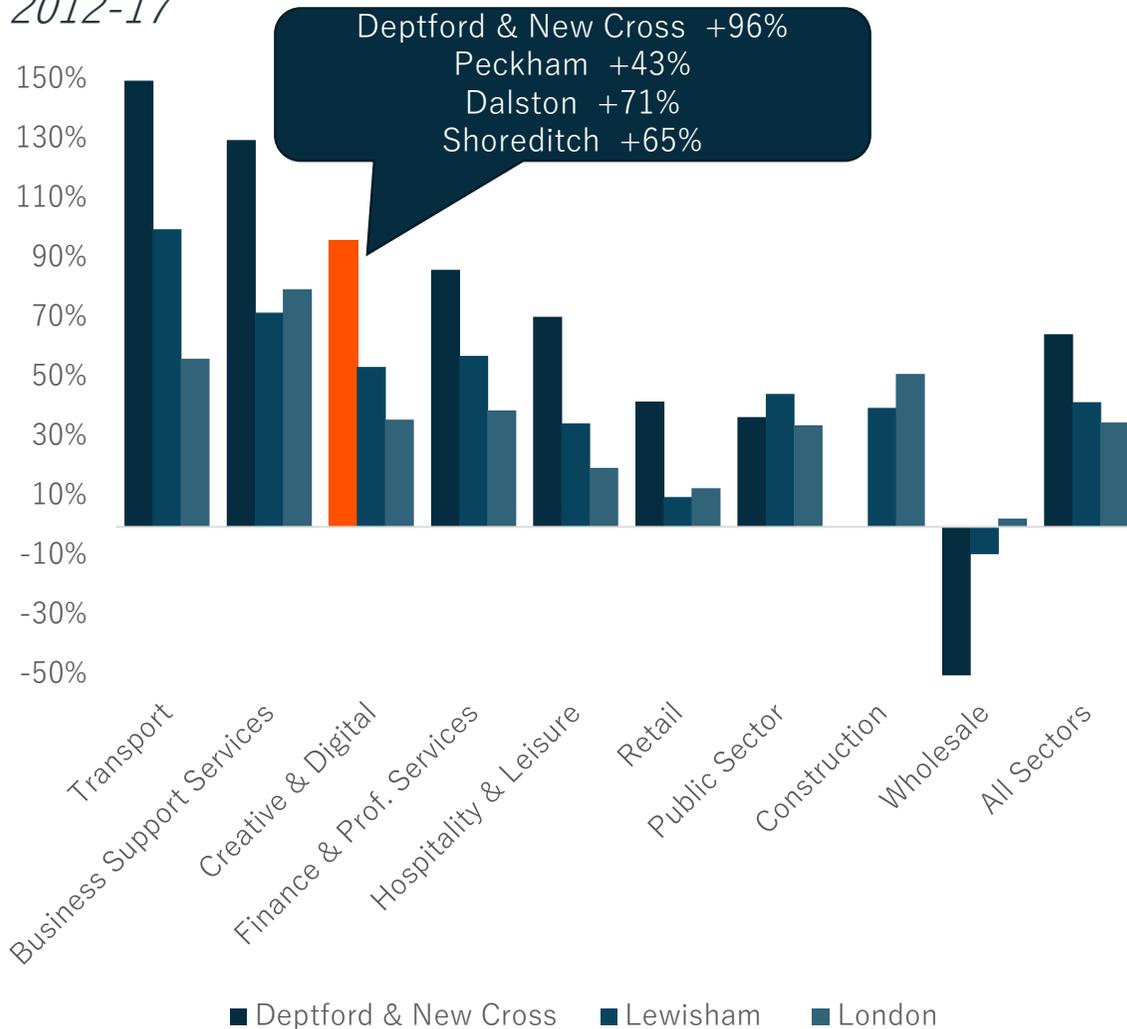
According to official statistics, the CDI sector within Deptford & New Cross accounts for a relatively small proportion of employment, compared to similar areas (e.g. Peckham).

However, given the nature of Deptford & New Cross' CDI sector (with specialism in art and design influence by Goldsmith's proximity), we expect that the sector is **significantly underestimated in official statistics**. This hypothesis is based on observational research (as shown later).

Source: BRES, ONS, 2016

Recent Business Growth

% Change in Number of Businesses (largest sectors shown), 2012-17

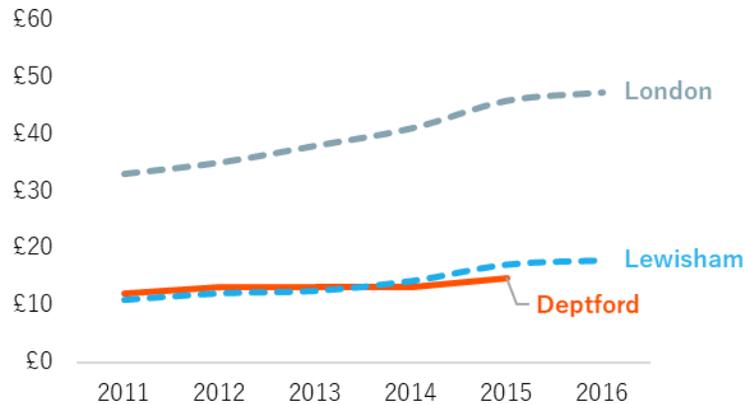


Deptford & New Cross has a **rapidly growing** CDI sector, with the sector **nearly doubling** over the last five years. The sector was the second fastest growing in the area, and has grown at a faster rate than Peckham, Dalston and Shoreditch.

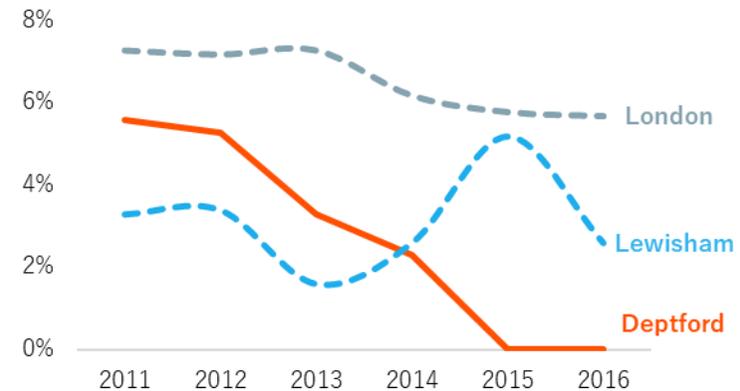
Source: UK Business Count, ONS, 2017

Commercial Property Market Performance

Office Rents (average / sqft)



Office Vacancy Rate (%)

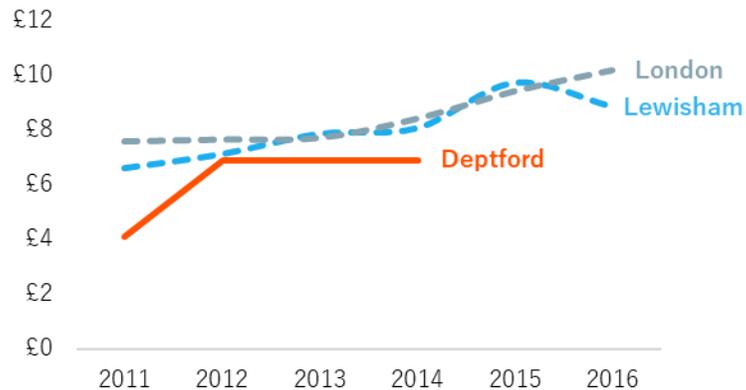


Deptford & New Cross currently has relatively **low office rentals**, although the **availability of office space is an issue**, with minimal units currently available to buy/let. There is clearly a barrier to relocation to and growth in the area and will **constrain the ability** to retain university spin-outs and to secure CDI growth.

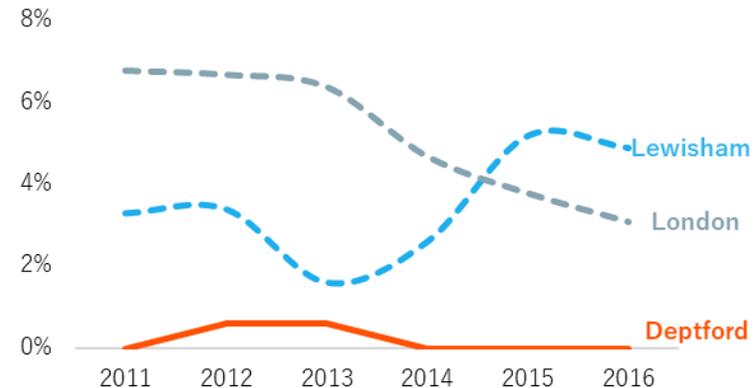
Source: CoStar, 2017 No office rental data available for 2016

Commercial Property Market Performance

Industrial Rents (average / sqft)



Industrial Vacancy Rate (%)



Industrial rental values in Deptford / New Cross are again below those experienced in Lewisham and London, making it a potentially affordable destination for CDI businesses.

However, there is also **currently very little availability** of industrial space in Deptford / New Cross.

Source: CoStar, 2017 No office rental data available for 2015-16

Observational Mapping – New Cross Gate

Core creative & digital businesses

- Advertising & Marketing
 - 1. Media research
 - 2. i2 media research
- Design: Product, graphic & fashion design
 - 3. Lockwood Building
- IT, software and computer services
 - 4. Goldsmiths digital
- Publishing
 - 5. Goldsmiths Press
- Museums, galleries & libraries
 - 6. MMX Gallery
 - 7. Lewisham Arthouse (gallery)
 - 8. The Old Police Station (gallery)
 - 9. Rutherford building, Goldsmiths library
- Music, performing & visual arts
 - 10. Goldsmiths Contemporary Arts Centre (upcoming)
 - 11. Goldsmiths Music Studios
 - 12. The London Theatre
 - 13. The Venue
 - 14. Lewisham Arthouse studios
 - 15. Old Police Station studios
 - 16. Laban Centre

Planning policy

- Strategic Industrial Land (SIL)
- Mixed Use Employment Location
- District Town Centre
- LB Lewisham borough boundary



Observational Mapping – New Cross Gate

Creative & digital activity in the area is strongly tied to Goldsmiths University in terms of the infrastructure and activities it supports and through its academic staff and student population.

Workspace provision

- **Goldsmiths University:** The university's facilities support creative and digital activity by providing both workspace and equipment. Facilities include: Music Studio, Design Studio, Goldsmiths Digital Studio, Games Lab.
- **Lewisham Art House:** Provides workspaces and exhibition spaces. Resident artists commit 5-hours per month in support of the organisation's wider programmes.
- **Old Police Station:** Creative studio provision in Grade II listed building on Amersham Vale managed by providers temporary contemporary.

Notable activity

Goldsmiths hosts a number of highly specialised businesses within the digital field with strong industry ties. It includes notably Goldsmiths Digital, a research consultancy and prototyping service for a range of sectors such as media, design, audio and medical health.

Placemaking

Goldsmiths University plays an active role in promoting and showcasing creative and digital activity in the area, allowing for interaction between students, creative & digital businesses as well as the wider public. Activity along the high street, such as the food & beverage offer also contributes to the area's identity of place.

Current & forthcoming development

Batavia Road to provide 114 residential units along with 1768sqm of Class B1. In the longer term, the potential extension of the Bakerloo line will have a major impact on the area.



Creative and digital activity in New Cross Gate is strongly tied to the presence of Goldsmiths University.



New residential units and work studios on Pagnell Street.



The Goldsmiths Centre for Contemporary Art will provide 8 exhibition spaces and 1000sqm of education space.



Goldsmiths Music Studios are available for student use as well as commercial hire.



Lewisham Art House on Lewisham Way provides workspace and specialist facilities to support artists.



New development along Batavia Road & Goodwood Road to provide residential and commercial space, including artist studios.

Observational Mapping – Deptford High Street

Core creative & digital businesses

■ Design: Product, graphic & fashion design

1. Studio Raw

■ Film, TV, video, radio and photography

2. Studio 101

3. Overdrive Studios

■ IT, software and computer services

4. Deptford Dek

■ Museums, galleries & libraries

5. Enclave Lab

6. Castor Projects

7. Res

8. new of the world

9. Could be good

10. Third text

11. Castor

12. Call & responses

13. Assembly

14. Bearspace

15. SE8

16. Deptford X

■ Music, performing & visual arts

17. The Albany

18. Heart n Soul

19. Apples & Snakes

20. Entelechy Arts

21. Kali Theatre Company

22. Montage Theatre Arts

23. Poetry London

Planning policy

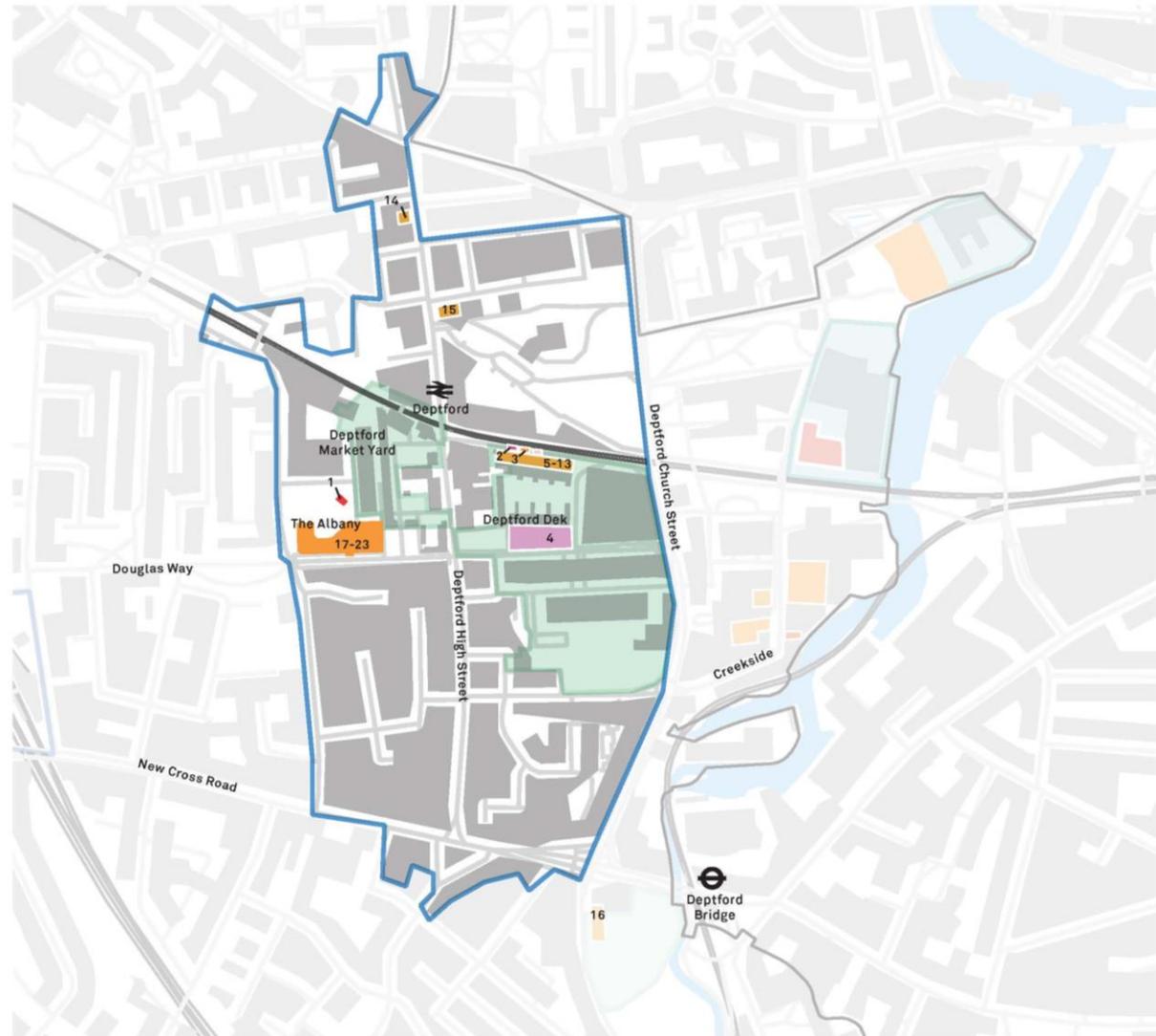
■ Local Employment Area

■ Mixed Use Employment Location

■ Site Allocation: Mixed Use Housing/Retail/Community

 District Town Centre

 LB Lewisham borough boundary



Observational Mapping – Deptford High Street

Creative & digital activity in and around Deptford High Street is highly outward-facing, with cultural venues and many gallery spaces. The area also features a notable overlap between creative & digital activity and social enterprises, sustaining strong ties to the local community through a range of engagement initiatives, activities and events.

Workspace provision

Significant amount of incubator space provided through council initiatives, and educational and/or cultural organisations:

- **The Albany:** Hosts performance, rehearsal and meeting space as well as 24 resident companies.
- **Enclave:** Hosts 8 incubator spaces for artists and curators.
- **Deptford Lounge & DEK:** Provides access to an ICT lounge as well to rehearsal studios and music studios.

The area also features a number of railway arches, which host a range of uses, from retail to light industrial.

Notable activity

Strong clustering of gallery and performance-space, a high proportion of which make use of digital technology both in the work they feature and to engage with the local community.

'Could be Good' gallery has worked in partnership with Heart n' Soul (charity dedicated to the promotion of creative talent of people with disabilities) to create 3D printed sculptures of the participants to display within the gallery.

Placemaking

Deptford X is London's longest running contemporary visual arts festival, presenting site-specific work in Deptford.



The Albany offers performance and rehearsal space as well as hosts 24 resident companies.



The Enclave hosts and supports 8 rolling independent spaces in an incubator set-up for artists and curators.



The railway arches along Resolution Way host a number of small creative businesses.



Deptford Market Yard hosts a range of small businesses in a succession of arches, notably a strong food and beverage offer.



Bearspace, an art gallery located along Deptford High Street.



Building on Griffin Street revamped by Heart n Soul; an organisation celebrating the creative talent of people with learning disabilities, located in The Albany.

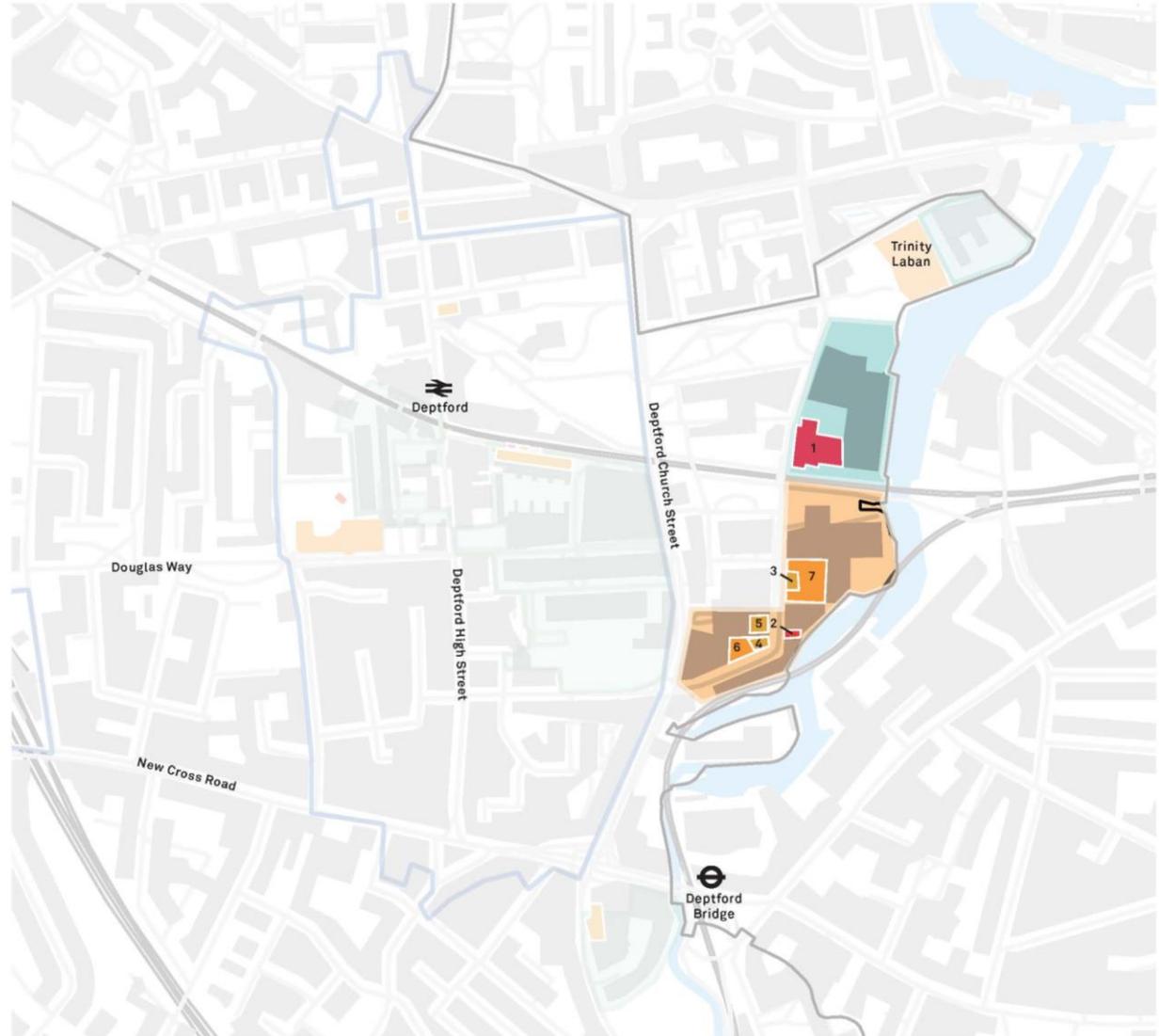
Observational Mapping – Creekside

Core creative & digital businesses

- Crafts
 1. Cockpit Arts: accomodates over 50 makers
- Design: Product, graphic & fashion design
 2. Happenstance studio
- Museums, galleries & libraries
 3. Art in Perpetuity Trust (Gallery)
 4. Art Hub (Gallery)
 5. The Artistry of Arabic Script
- Music, performing & visual arts
 6. Art Hub: 30 studios accomodating 50 artists
 7. Art In Perpetuity Trust: 42 workspaces for artists

Planning policy

- Local Employment Area
- Mixed Use Employment Location
- Site Allocation: Mixed Use Housing/Retail/Community facilities
- District Town Centre
- LB Lewisham borough boundary



Observational Mapping – Creekside

Creekside is defined by a substantial provision of artist studios and other creative workspaces. The area also features a number of upcoming large-scale mixed-use developments.

Workspace provision

- Cockpit Arts: Accommodating over 50 makers in an incubator set-up.
- Art Hub: features 30 studios accommodating 50 artists as well as in-house gallery space .
- Art in Perpetuity Trust (A.P.T.) provides 42 studio space for resident artists and features an in-house gallery space.
- The Artworks (upcoming): creative studios & gallery space.

Notable activity

Most of the activity on site currently falls within design, visual arts & crafts.

Placemaking

A number of studio providers in the area have in-house gallery space which provides a showcasing opportunity for resident artists and draws visitors onto the site.

The presence of Trinity Laban in the area has had a strong impact on the locality, drawing an accrued number of students and visitors to the site.

Current & forthcoming development

- The Faircharm Creative Quarter development includes the conversion of industrial space to 6,000sqm of studio and B1 workspace & 148 homes. Creekside Artists (artist studios) previously housed within the Faircharm Trading Estate will return to the site once the redevelopment is completed.
- Kent Wharf development will deliver 1375 sqm of commercial floorspace.



The former Faircharm Industrial Estate will host the new Faircharm Creative Quarter development by L&Q.



The A.P.T. hosts a number of resident artists as well as dedicated gallery space.



The Kent Wharf mixed-use development will deliver new residential units as well as commercial floorspace.



Art Hub features 30 studios accommodating 50 artists as well as a gallery space that features the work of resident artists.



Trinity Laban (Deptford) is the largest purpose-built contemporary dance centre in the world.



Cockpit Arts provides incubator space for craftspeople, offering business coaching and selling and promotional opportunities.

Observational Mapping – Surrey Canal Rd

Core creative & digital businesses

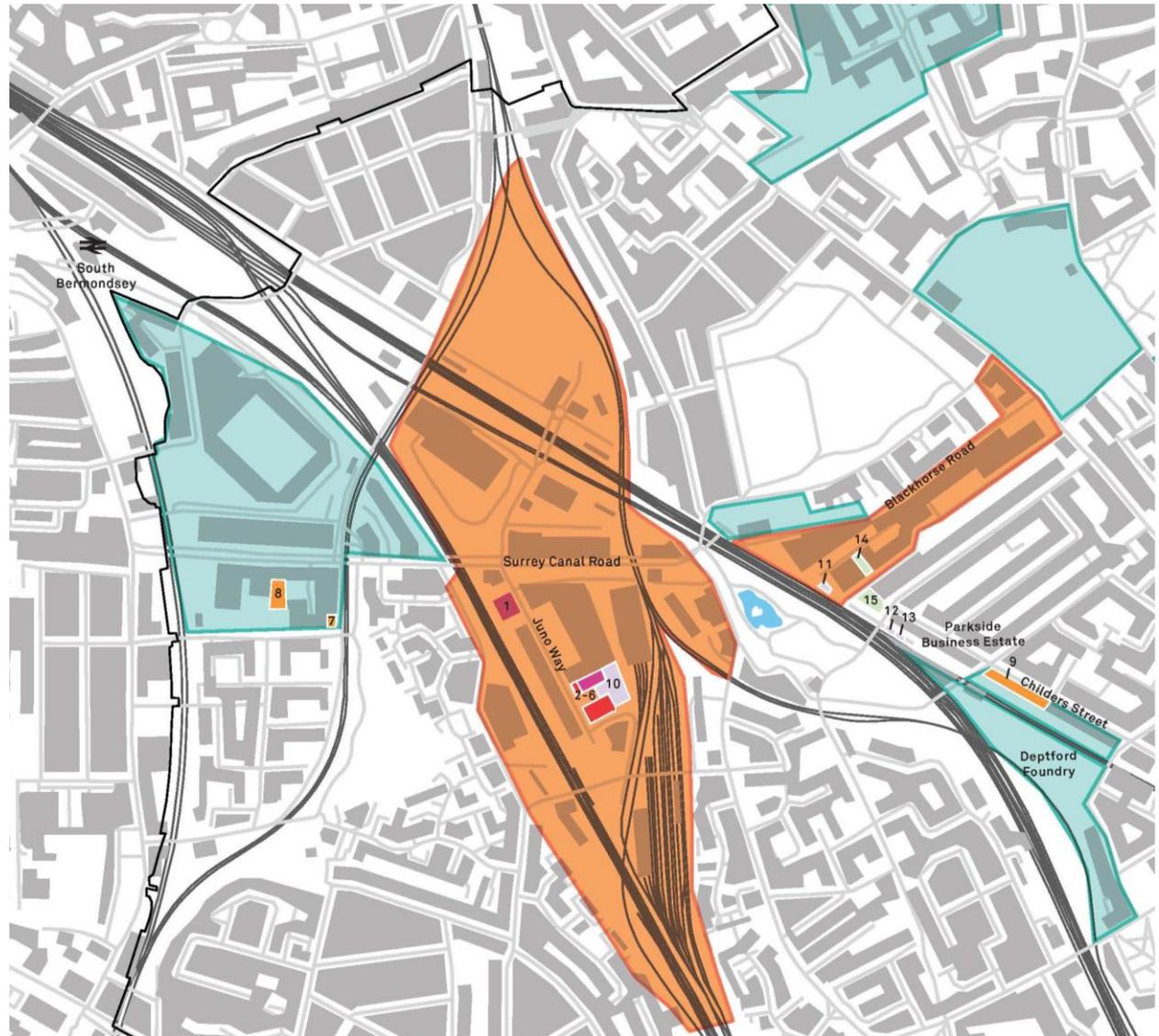
- Crafts
 1. Ceramic Studios Workshops
- Design: Product, graphic & fashion design
 2. Artistic Spaces: Matter Design
- Film, TV, video, radio and photography
 3. Artistic Spaces: Bubblegum Studio
 4. Artistic Spaces: Wandering Bears Studio
 5. Artistic Spaces: Studio Erameri
 6. Artistic Spaces: The Digital Holdings
- Museums, galleries & libraries
 7. Jupiter Woods
- Music, performing & visual arts
 8. Cell Studios: 32 self-contained studios
 9. Acme Studios: 112 self-contained studios

Supporting creative & digital businesses

- Manufacturing
 10. Illusion set design
 11. DFT printing services
 12. Insley & Nash bespoke textiles
 13. Aldworth James & Bond bespoke furniture
- Services
 14. Media services
 15. Resonics acoustics

Planning policy

- Strategic industrial land (SIL)
- Mixed Use Employment Location
- LB Lewisham borough boundary



Observational Mapping – Surrey Canal Rd

Industrial locations and typologies clustered in and around the Surrey Canal (SIL) host a range of creative & digital activity. The area also hosts a range of businesses that fall outside of the traditional DCMS definition of creative & digital industries, but that support creative & digital activity nonetheless.

Workspace provision

- ACME studios (Childers Street): 112 self-contained and 20 partitioned studios.
- Artistic Spaces (Juno Way): 46 studios distributed across 2 large-scale industrial units along Juno Way.
- Cell Studios (Rollins Street): provide 32 individual studios to 60+ fine artists.
- The Vive Living development along Childers Street provides dedicated co-working space for residents.

Notable sectors and businesses

Strong presence of design, film & photography and visual arts. The area also a strong clustering of:

- supporting creative & digital businesses within the manufacturing sector including: bespoke furniture manufacturing, textiles manufacturing, scenery and props manufacturing, and printing.
- supporting creative & digital businesses such as AV equipment hire, design for acoustics and instrument repair and restoration.

Current & forthcoming developments

- The Anthology Deptford Foundry development along Arklow road will deliver 276 new homes as well as workspaces targeted at artists, designers and makers.
- The Surrey Canal/New Bermondsey site is designated as a future mixed-use employment site.



ACME studios on Childers Street hosts 112 self-contained and 20 partitioned studios.



The Vive Living development along Childers Street provides dedicated co-working space.



The Anthology Deptford Foundry development along Arklow road will deliver 276 new homes as well as workspaces targeted at artists, designers and makers.



Parkside Business Estate features a number of light industrial space in railway arches, which accommodate creative manufacturing activities.



The Juno Enterprise Centre along Juno Way hosts the Ceramics Studio Co-op, providing co-working studio spaces to ceramics artists and designer makers.



Unit 10, along Juno Way, managed by Artistic spaces, contains 35 studios. It is located alongside Illusion, a scenery and props manufacturing business.

Key Findings from Observational Research

Observational analysis does suggest that the official statistics underestimate the sector. New Cross & Deptford features 4 clusters of creative & digital activity each of which has its own distinct creative ecosystems. These are summarised here:

Creekside

- Strong clustering of artists and makers workspace along Creekside Road.
- Prevailing workspace typology is creative studios and small industrial spaces (including makerspace).
- Affordability of workspace is key for continued business activity on site due to the reported price-sensitivity of tenants.
- Mixed-use development introducing residential uses on site and new workspace targeted at creative businesses, although spec and price-point likely to differ from current provision.

Surrey Canal (SIL)

- Large provision of industrial land, the SIL designation offers a degree of protection for activity business activity on site
- Prevailing workspace typologies are large industrial units subdivided to host creative studios. Older industrial stock is reported as specially suitable to accommodate messier and noisier uses as well as a range of production processes.
- The area also features a range of uses within the manufacturing and service sectors that support creative and digital activity such as AV equipment hire, textile manufacturing, printing services and acoustics specialists.

New Cross Gate

- Largely defined by institutional presence of Goldsmiths University
- Prevailing workspace provision is creative studios, with some office space provision mostly tied to Goldsmiths University.
- University's workspace infrastructure, equipment and staff supports highly-specialised businesses (i.e. digital media research, user experience research, etc.)
- The university's infrastructure and events programming supports wider public engagement with creative & digital activity in the area.
- Reported desire from businesses to provide a 'business hub' providing flexible workspace as well as informal meeting spaces.
- Recent loss of artist workspace provision in the area. Creative workspace providers face a certain level of uncertainty related to the threat of residential development.
- New mixed-used development to provide workspace targeted at creative uses.

Deptford High Street

- Clustering of incubator space targeted at creative & digital activity (Enclave Projects).
- Prevailing workspace typologies include small industrial units (railway arches), small office space & shared desk-spaces.
- Large concentration of galleries and performance space (The Albany) providing infrastructure for cultural consumption.
- High-level of business engagement in community initiatives and social enterprises within the wider creative & digital ecosystem
- The area features a long-standing network of creative businesses that can be channelled into renewed opportunities for collaboration and support. Reported ambition from local businesses to further strengthen local creative networks.

Summary

- Emerging Creative and Digital sector around New Cross and Deptford, with **excellent connections to highly Creative & Digital areas** (e.g. Shoreditch, Peckham, Dalston)
- Observational research shows that there is already a **thriving Creative and Digital sector** which is not necessarily reflected in official statistics
- Presence of Goldsmiths University supporting development of sector locally, and the sector reflects Goldsmiths' strengths (e.g. fashion manufacturing, design and architecture)
- Creativity is already **part of the narrative of the identity of the place**
- Relatively **low office and industrial rents** are a key attraction for Creative & Digital businesses. However, the low number of vacant units presents a barrier to the sector's development in the area

Strong assets and clear narrative suggest that Deptford and New Cross this should be a priority area for the strategy. The borough should seek to build its reputation and specialisms making it one of London's key zones for Creative and Digital activity.



Focus on...Lewisham Town Centre

Headline Findings

Indicators	Lewisham Town Centre Creative & Digital
Employment (2016)	c. 320
Businesses (2017)	c. 190
Employment specialisation vs. London	0.3
Employment Growth (2011-16)	+50%
Business Growth (2012-17)	+58%
Sub-sector specialisms	IT, software & computer services; Music & Performing Arts; Design

Statistically, Lewisham town centre has a very small CDI sector at present, although it has experienced some **business growth** over the last five years.

Given the size of the centre, the sector is quite **under represented** with the statistics.

Business Sectors

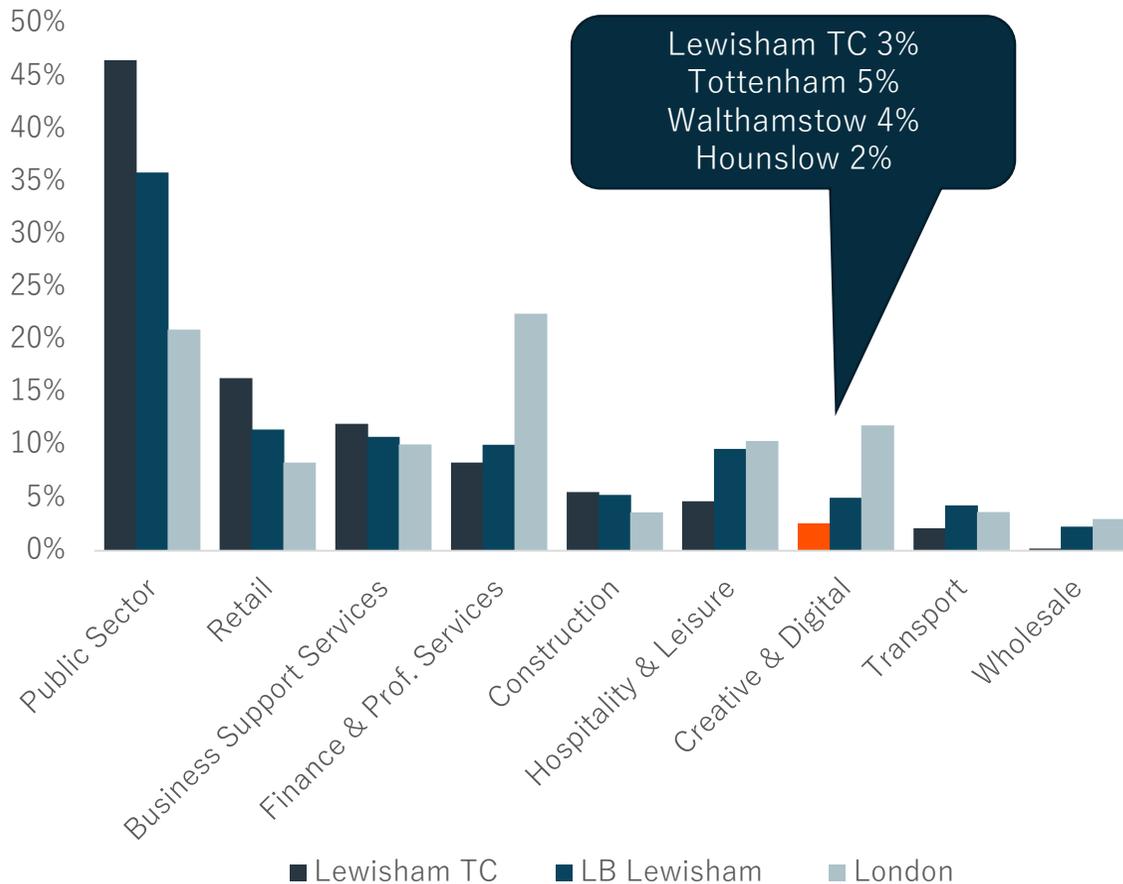
Creative and Digital Sub-sector	Lewisham Town Centre		Lewisham
	Total Businesses	% Total	% Total
IT, software & computer services	115	61%	42%
Music, performing & visual arts	20	11%	15%
Film, TV, video, radio & photography	15	8%	16%
Design	15	8%	8%
Advertising & Marketing	10	5%	9%
Architecture	10	5%	0%
Publishing	5	3%	3%
Fashion Manufacturing	-	0%	2%
Museums, galleries & libraries	-	0%	1%
Crafts	-	0%	0%
Total	190	100%	100%

Note: Number of businesses rounded to nearest 5

Source: UK Business Count, ONS, 2017

Employment by Sectors

Proportion of total employment by sector (largest sectors shown), 2016

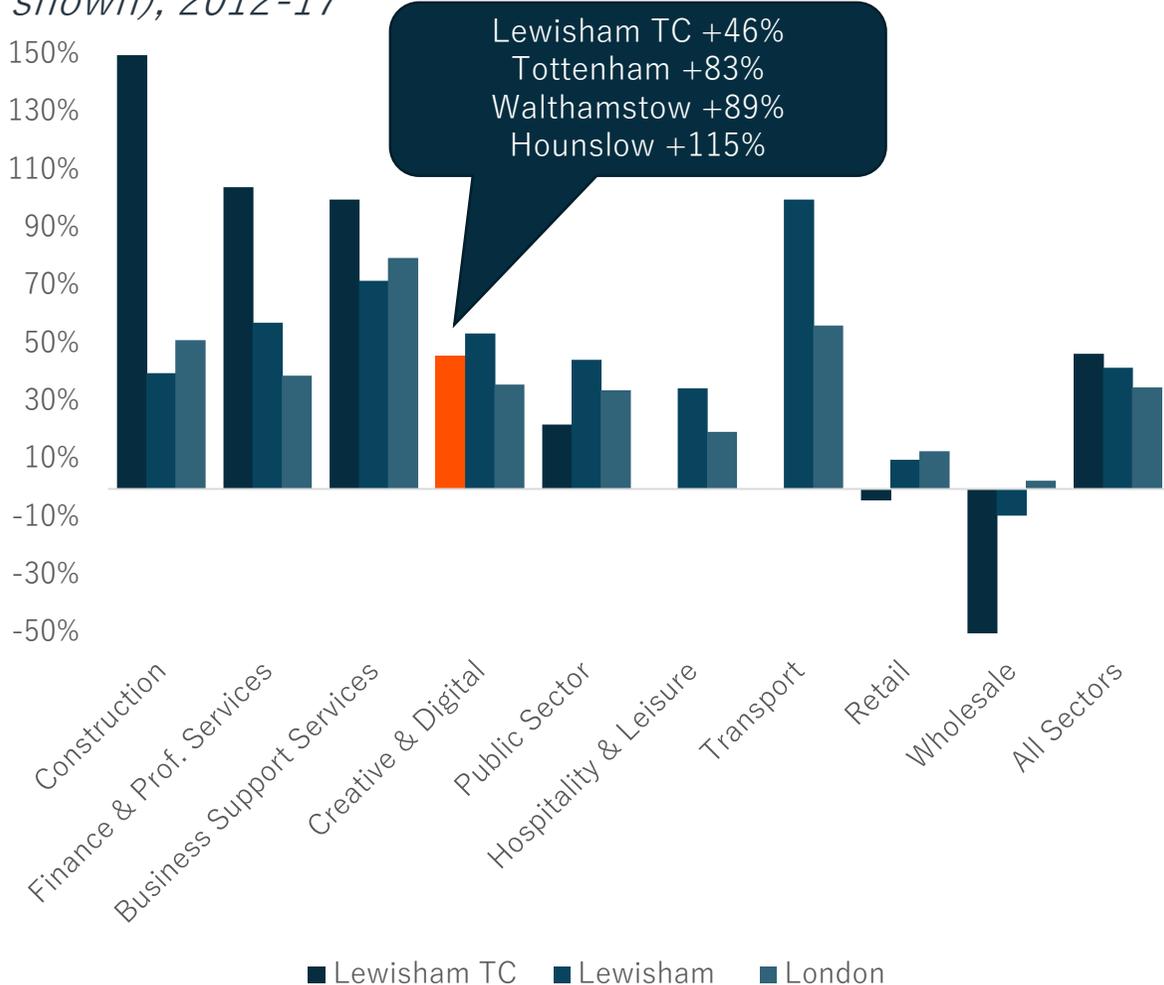


Lewisham town centre’s CDI sector is relatively small. It has a lower proportion of CDI businesses than other established large town centres which are also targeting growth in the CDI sector (Tottenham, Walthamstow and Hounslow).

Source: BRES, ONS, 2016

Recent Business Growth

% Change in Number of Businesses (largest sectors shown), 2012-17



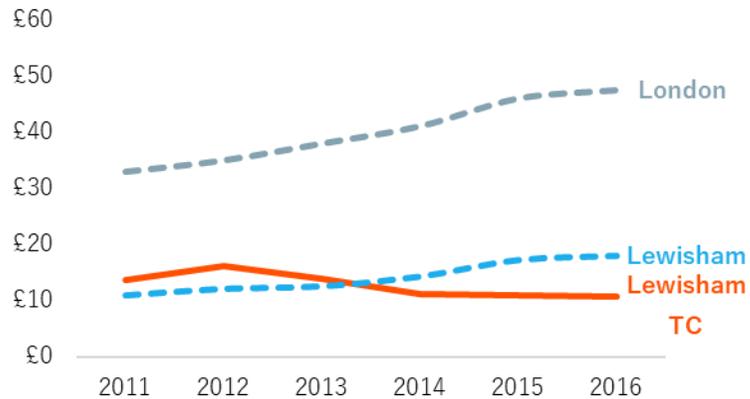
Lewisham town centre has a **growing CDI sector**, with the number of businesses in the sector increasing by 46% over the last five years.

However, the sector has not grown as quickly as comparator areas, but is still growing at a faster rate than in London as a whole.

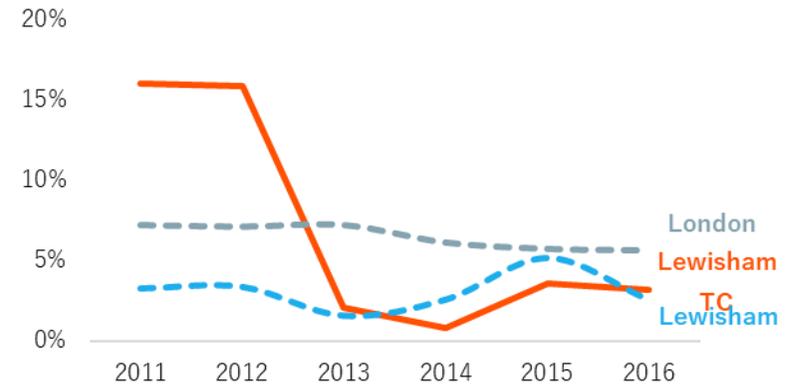
Source: UK Business Count, ONS, 2017

Commercial Property Market Performance

Office Rents (average / sqft)



Office Vacancy Rate (%)



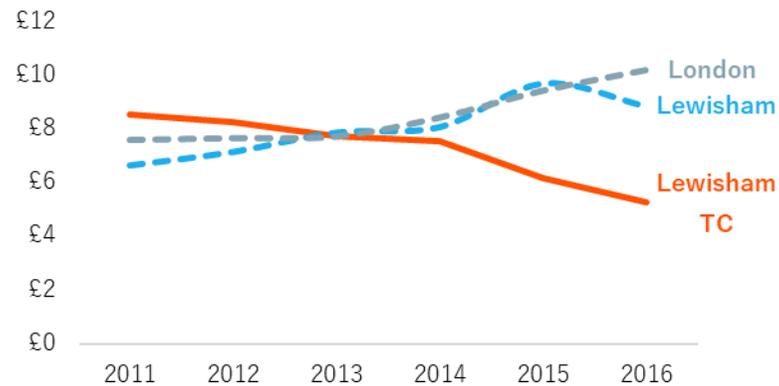
Lewisham town centre currently has relatively **low office rental levels**, which have been decreasing over the last four years.

The office vacancy rate (4%) is broadly the same as the borough as a whole.

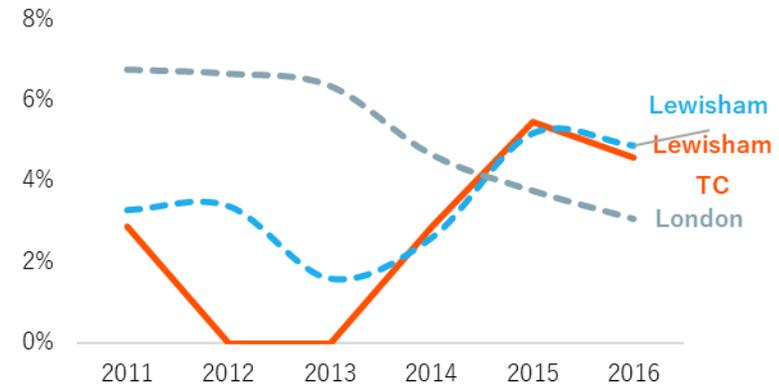
Source: CoStar, 2017

Commercial Property Market Performance

Industrial Rents (average / sqft)



Industrial Vacancy Rate (%)



Industrial rental values have decreased over the last three years. Currently, rents for industrial units are also around 40% lower than the borough as a whole and London.

There is currently a **reasonable level of industrial space available**, with around 5% of units currently vacant.

Source: CoStar, 2017

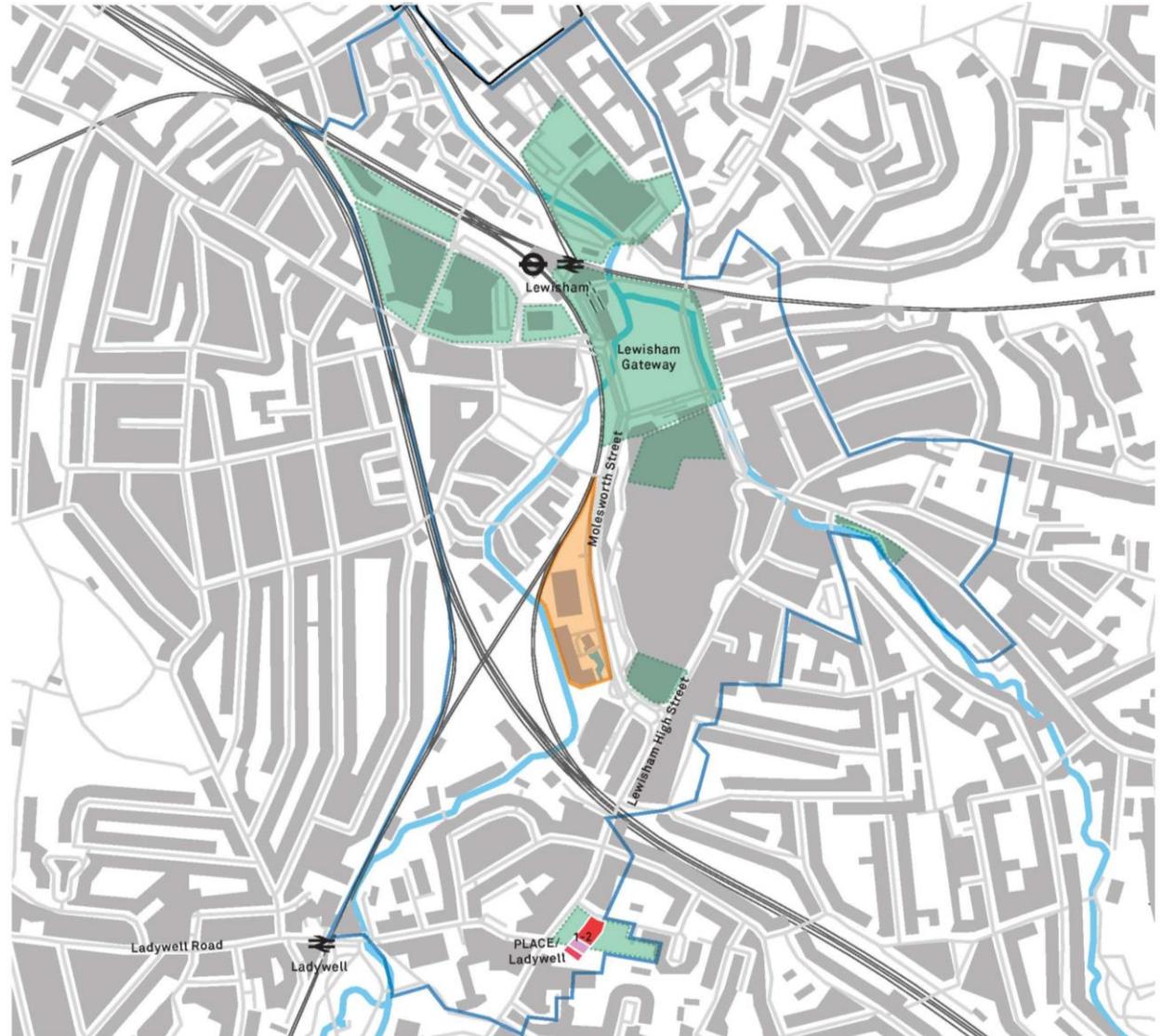
Observational Mapping

Core creative & digital

- Advertising & Marketing
- 1. Rekindle Marketing
- Design: Product, graphic & fashion design
- 2. Place / Ladywell
- IT, software and computer services
- 3. Deptford Dek

Planning policy

- Local Employment Area
- Development Sites (referred to in the Lewisham Town Centre Policy Area policies)
- Major Town Centre
- LB Lewisham borough boundary



Observational Mapping

Lewisham Town Centre is defined by large-scale development delivering a mix of residential, retail and leisure floorspace. There is emerging creative & digital activity in the area.

Workspace provision

- **PLACE / Ladywell:** Managed by Meanwhile Space, the ground floor offers affordable co-working spaces, retail units and market units for local start-ups and creatives.
- **Ladywell DEK:** Located within the Place / Ladywell, the centre offers eight office units for up to six team members, and 12 hot-desks.
- **V22 Ladywell Bridge:** V22 have taken a 10-year lease on seven arches below the Ladywell Bridge to provide studios for artist, creative businesses and social enterprises.

Notable activity

Emerging creative & digital activity in Lewisham is tied to incubator spaces providing desk-based workspaces as well as retail units.

Placemaking activity

LB Lewisham has sought expressions of interests for the redevelopment of Ladywell Playtower. Bidder selection will take place in autumn 2017 and include Goldsmiths University, Curzon, Picturehouse and Copeland Park. The proposed scheme from Goldsmiths is to deliver a purpose-built centre for post-graduates Art courses which will house a number of artist studios and community facilities.

The Model Market Street Feast is a contributor the town centre's night-time economy, featuring small food and beverage businesses.

Current and forthcoming development

Lewisham Gateway: Scheme delivering around 900 new homes, new retail, restaurant and commercial space.



The Lewisham Gateway mixed use development will deliver considerable new housing, retail and leisure floorspace.



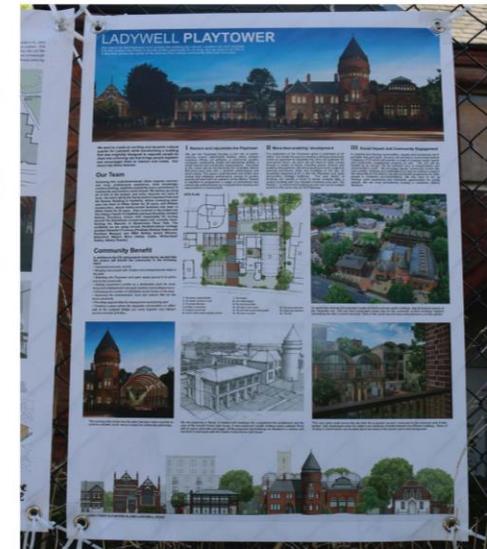
Individual retail units within PLACE / Ladywell.



PLACE / Ladywell offers affordable co-working space as well independent retail units and market units.



The Model Market Street Feast is an evening market featuring a number of small food and beverage businesses.



LB Lewisham has sought expressions of interest for the redevelopment of Ladywell Playtower.



Workspace provider V22 to provide studios under the Ladywell Bridge for artists, creative businesses and social enterprises.

Key Findings from Observational Research

- **Limited creative & digital activity** in comparison to other identified locations.
- However, **some emerging creative & digital activity** tied to workspace at Place / Ladywell and upcoming provision at V22 Ladywell Bridge.
- Prevailing observed workspace typologies include individual and shared office space (with incubator space & co-working).
- New schemes offer the potential of increased creative & digital activity in the area namely the redevelopment of Ladywell Playtower.

Summary

- Very small amount of creative and digital activity within statistics or observed.
- Current and future connectivity, alongside a changing population and labour market may stimulate future sector growth – Already momentum in new and pipeline development.
- Longer term potential to enhance cultural amenity and inject more creativity into Lewisham Town Centre.

Lewisham Town Centre is the borough's largest centre, which means it has capacity to secure more CDI activity. Ensuring improved amenity alongside development giving the area a more dynamic and creative 'feel'. Ensuring that new workspace is appropriate for, but not necessarily targeted at Creative and Digital



Focus on...Brockley

Headline Findings

Indicators	Brockley Creative & Digital
Employment (2016)	c. 370
Businesses (2017)	c. 250
Employment specialisation vs. London	0.9
Employment Growth (2011-16)	+118%
Business Growth (2012-17)	+60%
Sub-sector specialisms	IT, software & computer services; Film, TV, Video, Radio & photography; Music & Performing Arts

Headline evidence for Brockley, shows the area is home to a **growing and productive CDI sector**. Specialisms in IT, software & computer services; Film, TV, Video, Radio & photography; and Music and Performing Arts.

Data suggests that **the area hosts a number of self-employed and micro businesses** within these sectors, perhaps those looking for cheaper workspace than in Central London.

Business Sectors

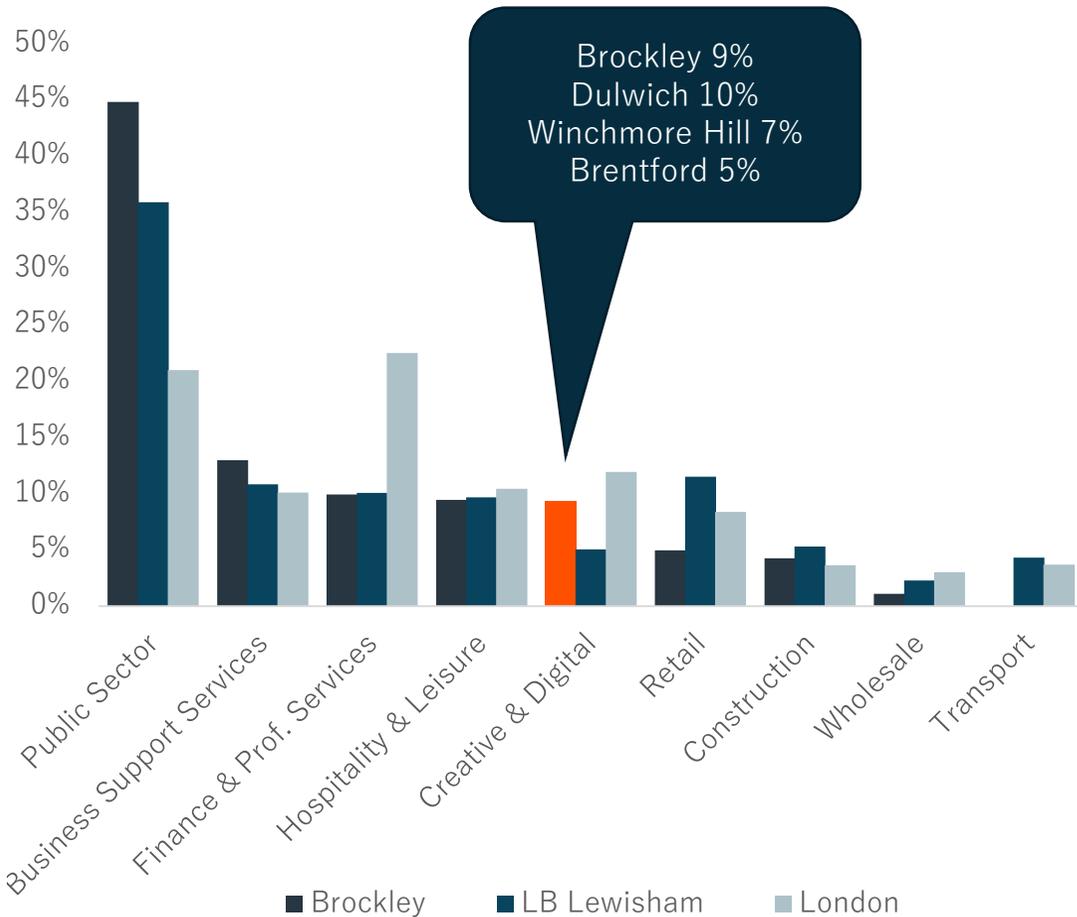
	Brockley		Lewisham
Creative and Digital Sub-sector	Total Businesses	% Total	% Total
IT, software & computer services	100	41%	42%
Film, TV, video, radio & photography	50	20%	16%
Music, performing & visual arts	40	16%	15%
Advertising & Marketing	30	10%	9%
Design	20	8%	8%
Architecture	10	4%	0%
Crafts	-	0%	0%
Fashion Manufacturing	-	0%	2%
Museums, galleries & libraries	-	0%	1%
Publishing	-	0%	2%
Total	250	100%	100%

Note: Number of businesses rounded to nearest 5

Source: UK Business Count, ONS, 2017

Employment (by sector)

Proportion of total employment by sector (largest sectors shown), 2016

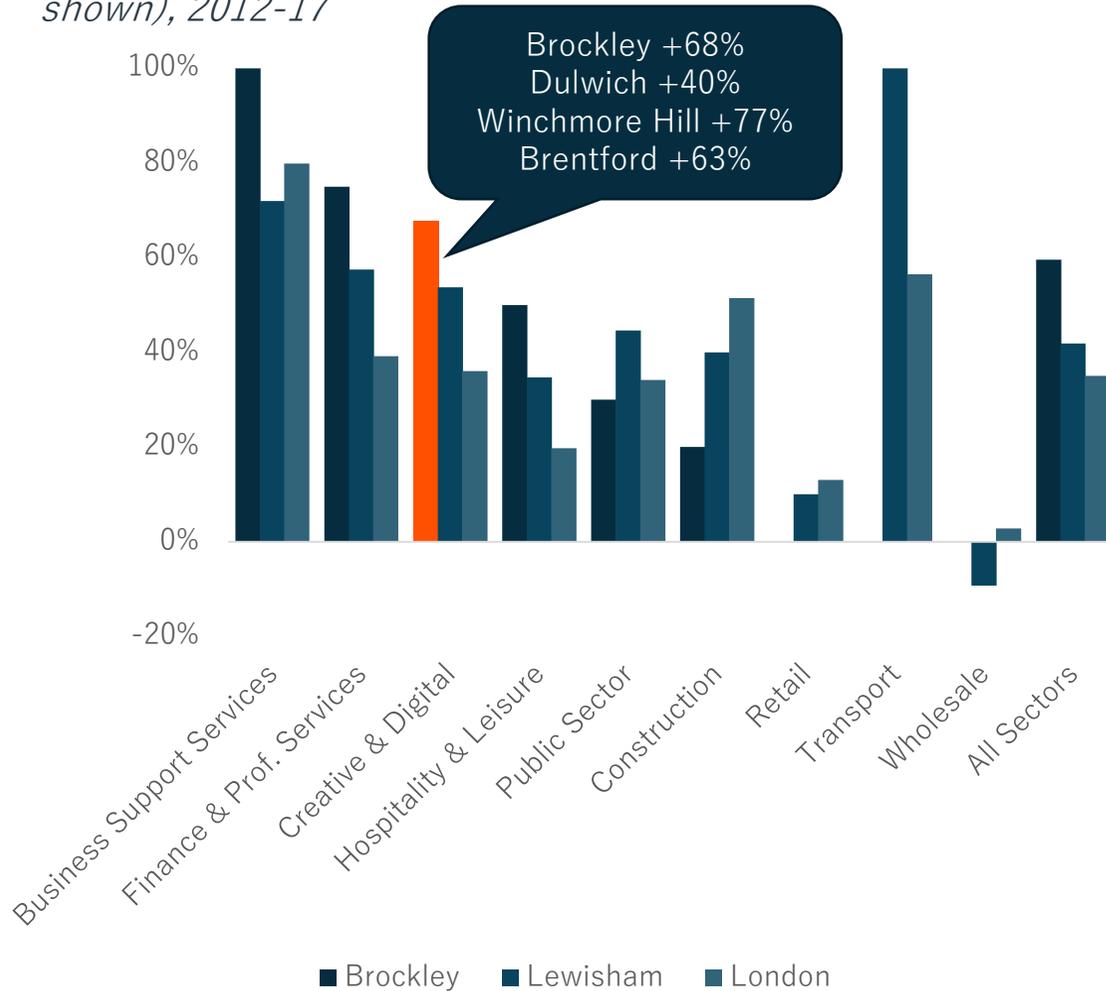


The CDI sector accounts for a higher proportion of employment than in Lewisham as a whole. This activity is similar to comparators Winchmore Hill and Brentford, but lower than nearby Dulwich.

Source: BRES, ONS, 2016

Recent Business Growth

% Change in Number of Businesses (largest sectors shown), 2012-17



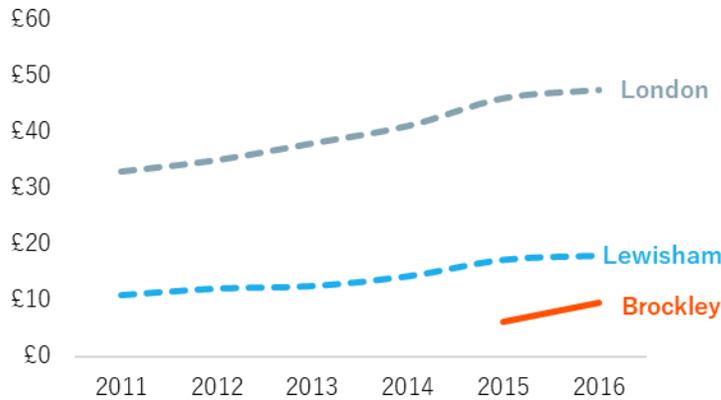
Brockley has a rapidly growing CDI sector, with an 68% increase in the number of CDI businesses over the last five years. This is **over double the business growth rate experienced across London.**

Brockley has outperformed all of comparator areas in terms of CDI business growth, with a strong trajectory for the future.

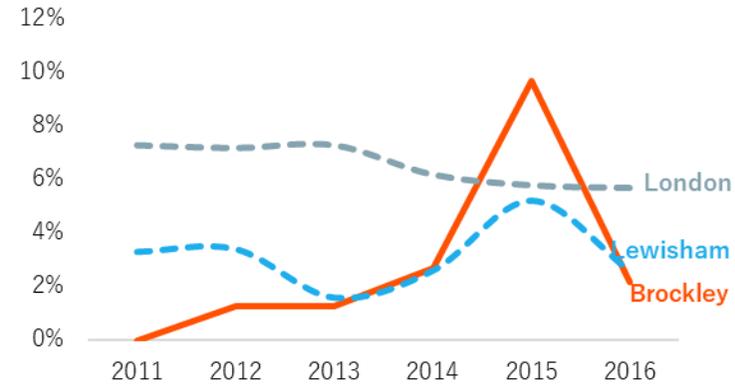
Source: UK Business Count, ONS, 2017

Commercial Property Market Performance

Office Rents (average / sqft)



Office Vacancy Rate (%)



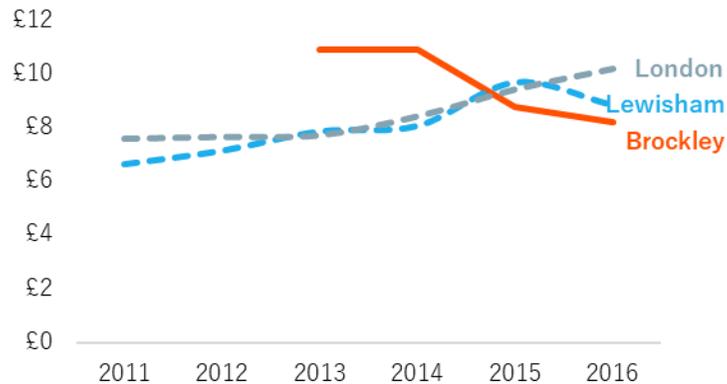
Brockley has a relatively small office market, and therefore there is little data available with which to judge market performance. Recent transactions suggest that **current office rentals are relatively low.**

However, **low availability of office space** is an issue, with only 2% of office units currently available to let/buy. The lack of office space in Brockley (when compared with the large scale of the CDI sector suggests there are higher levels of homeworking within Brockley than elsewhere in the borough.

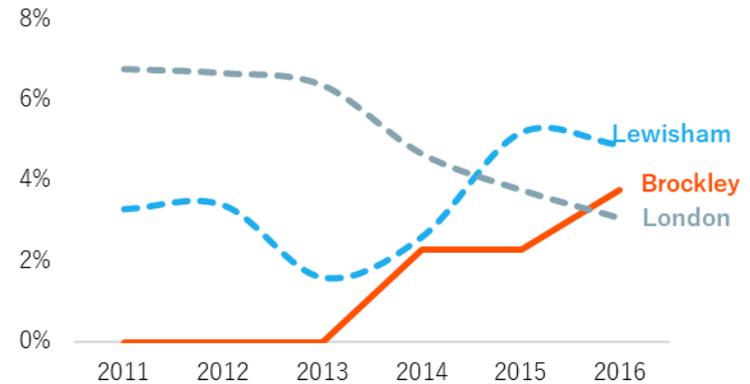
Source: CoStar, 2017 No office rental data available for 2011-14

Commercial Property Market Performance

Industrial Rents (average / sqft)



Industrial Vacancy Rate (%)



Industrial rental values are comparable to those across LB Lewisham and London, although there has been a **decrease in rents** over the last three years, making it increasingly affordable.

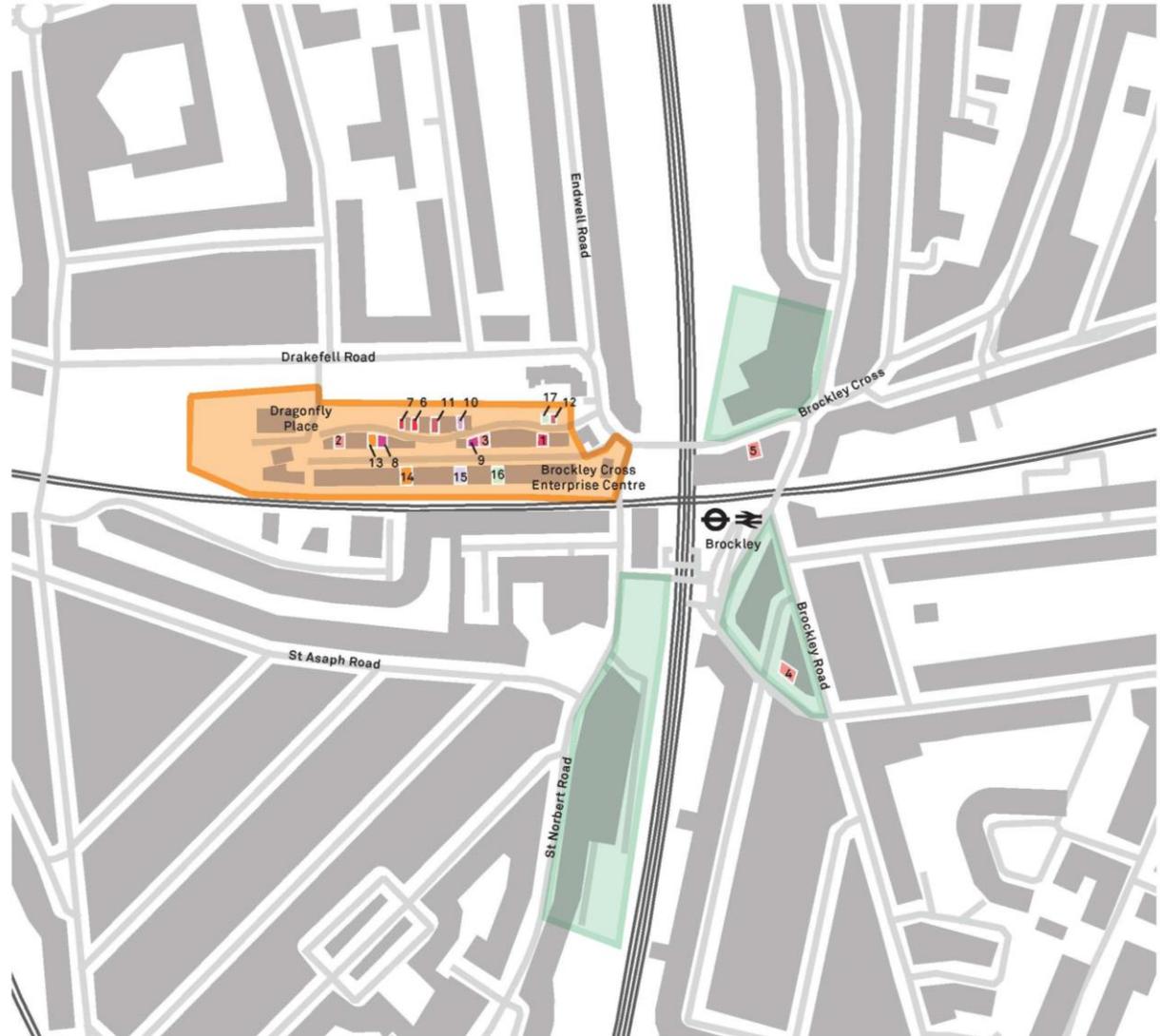
There is currently **low availability** of industrial space in Brockley, although more space has become available in the last three years.

Source: CoStar, 2017 No industrial rental data available for 2011-12

Observational Mapping

Core creative & digital businesses

- Advertising & Marketing
 - 1. Ed public relations
- Architecture
 - 2. Friel Architecture
 - 3. Stolon studio
 - 4. Selencky Parsons
 - 5. Green Tea Architects Design Group
- Design: Product, graphic & fashion design
 - 6. Studio Lovelock
 - 7. Model makers
- Film, TV, video, radio and photography
 - 8. Benjamin Rice
 - 9. Lucid
- IT, software and computer services
 - 10. Haplo
- Publishing
 - 11. Studio Mack
 - 12. The pie
- Music, performing & visual arts
 - 13. Artist studio
 - 14. Fine life cast sculpture
- Supporting creative & digital businesses**
- Manufacturing
 - 15. Made by Jason - Bespoke furniture
- Services
 - 16. Solo sound hire
 - 17. Carillon direct - Audio visual equipment repair
- Planning policy**
- Local Employment Area
- Site Allocation: Housing/Retail/Community
- LB Lewisham borough boundary



Observational Mapping

Brockley features a strong clustering of desk-based creative and digital activity concentrated in the new development on Dragonfly Place. The area also features a provision of office and light industrial units within the Brockley Cross Business Centre. Additionally, office units on the groundfloor of recently delivered residential developments are occupied by professional services (e.g. architecture).

Workspace provision

- Dragonfly Place features 32 commercial units hosting architecture, design and publishing practices. During the first 2 years, the units were used as artist studios in an initiative managed by temporary contemporary (studio providers). The studios were then remodelled for commercial and residential uses.
- The Brockley Cross Business Centre hosts multiple units - from office to light industrial.
- The Tea Factory Building converted to residential with groundfloor office space currently housing an architecture studio.

Notable activity

The area features a strong clustering of architecture, design and publishing businesses. Some businesses lease extra desk space in their individual office units to local freelancers.

The area also features a range of supporting creative & digital activity such as bespoke furniture and shop fitting, printing, food manufacturing, AV equipment hire.

Placemaking Activity:

The area around Brockley station features a number of public amenities and a strong food and drink offering. These provide informal meeting spaces for businesses in the area.



The Dragonfly Place development features a strong clustering of creative and digital industries located in groundfloor commercial



The Tea factory building on Endwell road features a number of groundfloor commercial/office units.



Friel, an architecture practice located within a commercial unit on Dragonfly Place.



The area around Brockley station features a number of public amenities and a strong food and drink offering.



The Brockley Cross Business Centre, hosting a number of supporting creative industries.



The groundfloor of a new residential development on Coulgate street hosts architecture practice Selenky Parsons.

Key Findings from Observational Research

- Strong clustering of **desk-based creative & digital activity** and professional services in new mixed-use development along Dragonfly Place.
- The prevailing workspace typology is small office spaces.
- Business report moving to the area from other locations (central London, Brixton, Shoreditch) due to the relative affordability and quantum of space for price, with most business owners living locally.
- Reported large freelancing community which could benefit from the provision of co-working space.
- Dragonfly Place development initially hosted temporary artist studios within the 'Artistic Village Brockley' managed by tempcontemporary. Tempcontemporary also provide managed workspace in Deptford & New Cross (Enclave and the Old Police Station).
- There are relatively high levels of home working in the area, given the lack of office space relative to employment levels.

Summary

- Rapid growth in **specialized and higher value activities**
- Change in population profile, potentially leading to a **more skilled, entrepreneurial population**
- Average business size smaller, with a high proportion of sole traders and home workers
- Increasing emergence of assets and infrastructure that supports creative & digital activity
- **Established artistic identity** is helping embed creativity in the area

Facilitate the ongoing evolution of Brockley, focusing on the c.200 creative & digital individuals who are driving the local sector. Identify specific opportunities to scale activities and in some cases graduate to other locations in the borough



Focus on...Forest Hill

Headline Findings

Indicators	Forest Hill Creative & Digital
Employment (2016)	c. 650
Businesses (2017)	c. 450
Employment specialisation vs. London	1.1
Employment Growth (2011-16)	+53%
Business Growth (2012-17)	+56%
Sub-sector specialisms	IT, software & computer services; Museums, galleries & libraries; and Music & Performing Arts

Forest Hill has a **reasonably large CDI economy** at present, with **strong business and employment growth** over the last five years. The area is one of only a few in Lewisham to have a concentration of employment equal to that of London.

The presence of the **Horniman Museum and Gardens** accounts for the strength Forest Hill has in museums, galleries and libraries.

Business Sectors

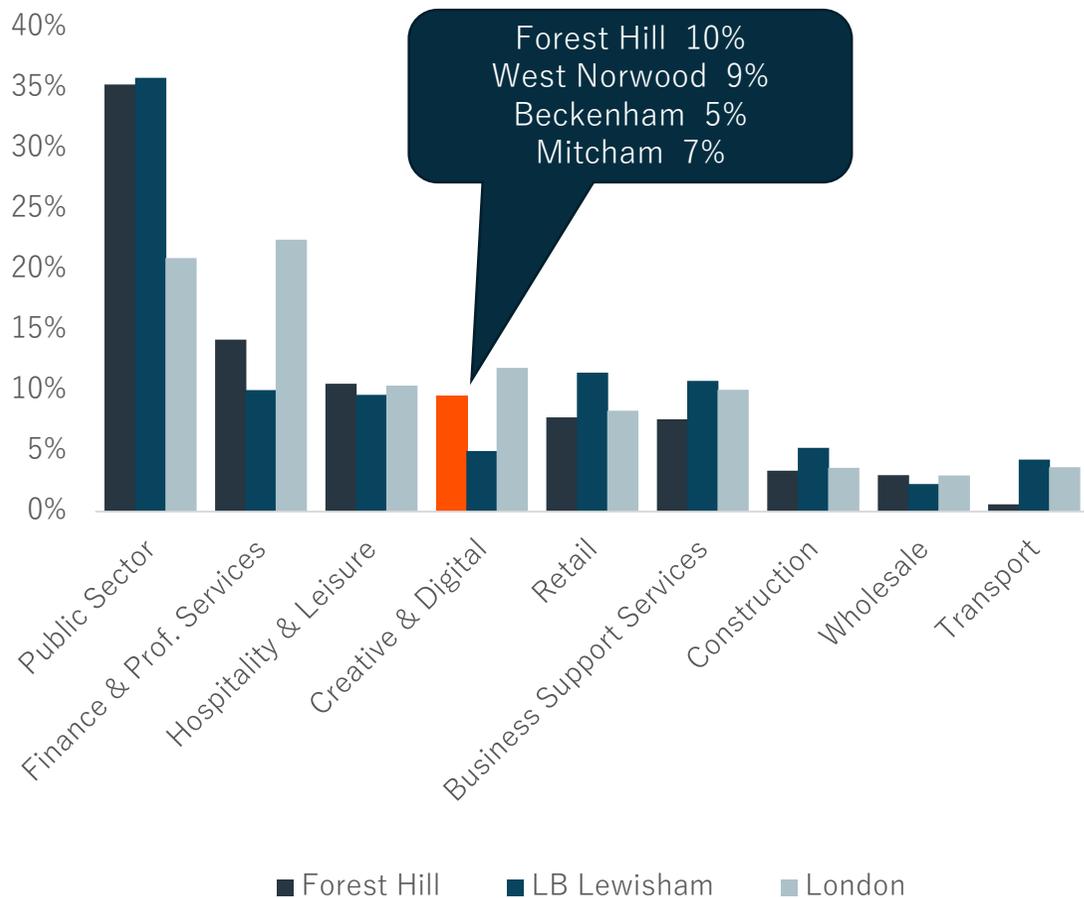
Creative and Digital Sub-sector	Forest Hill		Lewisham
	Total Businesses	% Total	% Total
IT, software & computer services	175	39%	42%
Music, performing & visual arts	100	22%	15%
Film, TV, video, radio & photography	85	19%	16%
Design	35	8%	8%
Advertising & Marketing	30	7%	9%
Architecture	20	4%	0%
Publishing	5	1%	3%
Museums, galleries & libraries	-	0%	1%
Fashion Manufacturing	-	0%	2%
Crafts	-	0%	0%
Total	450	100%	100%

Note: Number of businesses rounded to nearest 5

Source: UK Business Count, ONS, 2017

Employment by Sectors

Proportion of total employment by sector (largest sectors shown), 2016



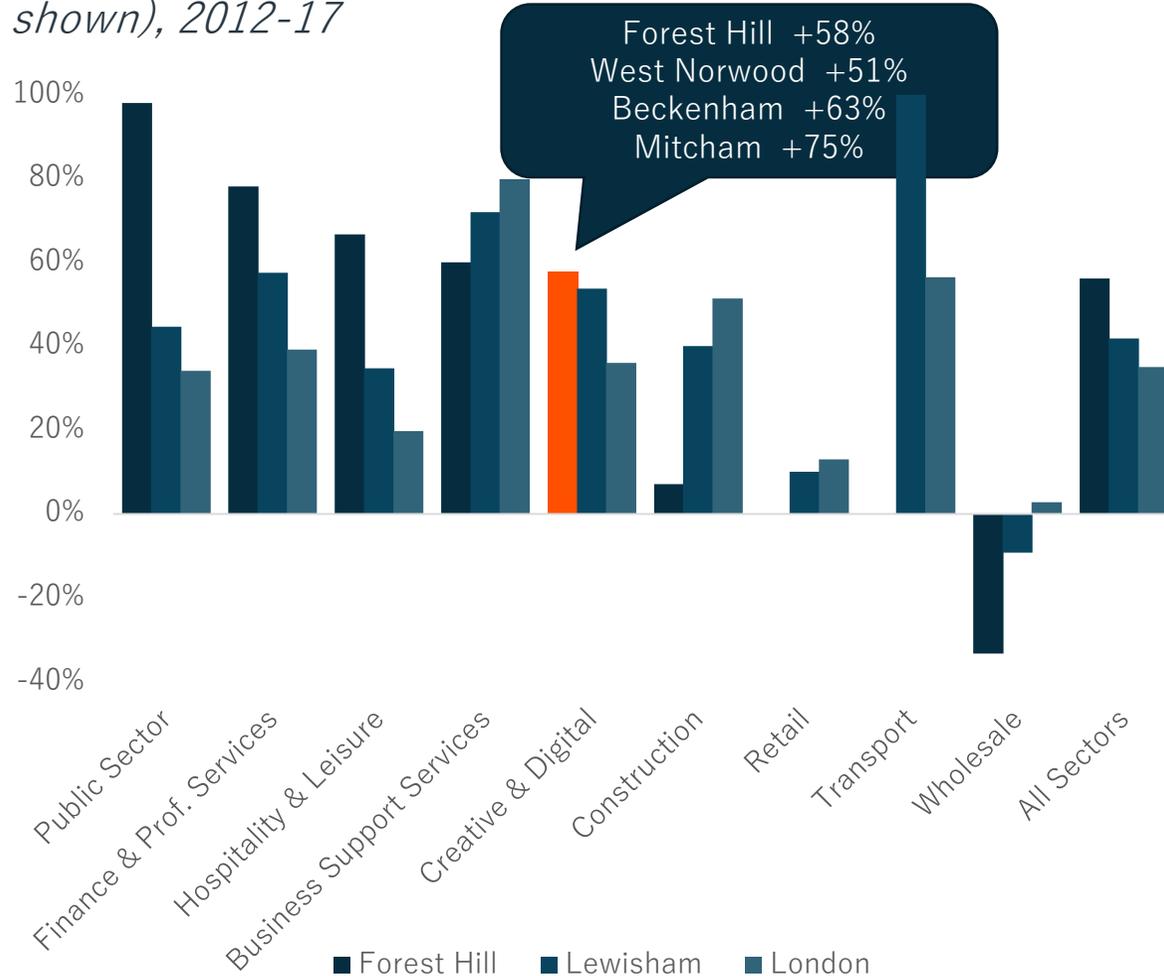
Forest Hill’s CDI sector has a higher proportion of activity than experienced across Lewisham.

Forest Hill has higher levels of Creative and Digital employment than West Norwood, Beckenham and Mitcham.

Source: BRES, ONS, 2016

Recent Business Growth

% Change in Number of Businesses (largest sectors shown), 2012-17



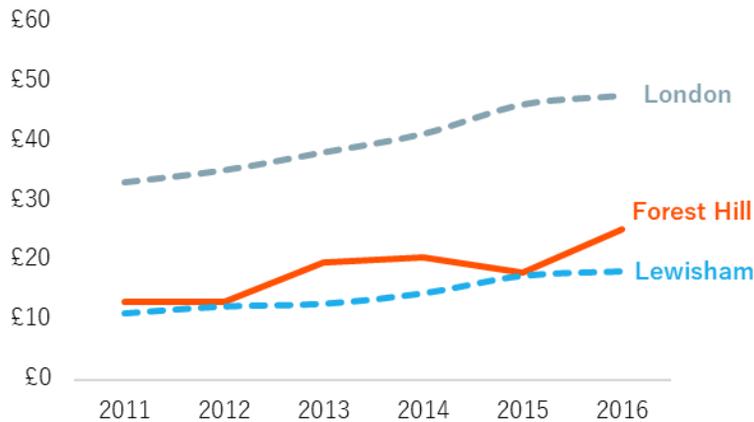
Forest Hill has a **rapidly growing CDI sector**, with the number of businesses in the sector increasing by 58% over the last five years.

The CDI sector in Forest Hill has been growing at a faster rate than across Lewisham and nearly twice as fast as across London.

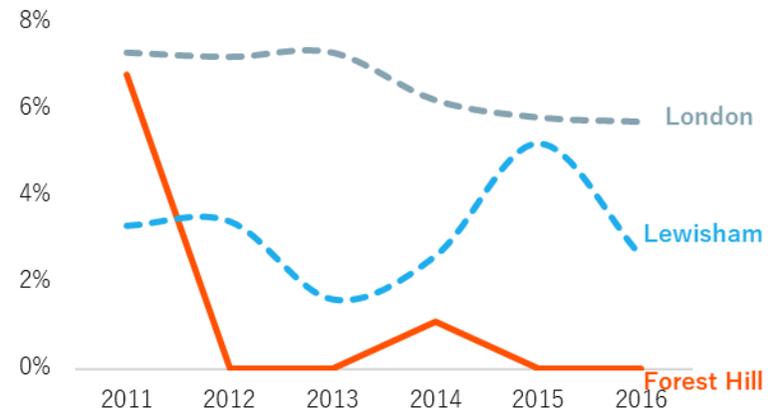
Source: UK Business Count, ONS, 2017

Commercial Property Market Performance

Office Rents (average / sqft)



Office Vacancy Rate (%)



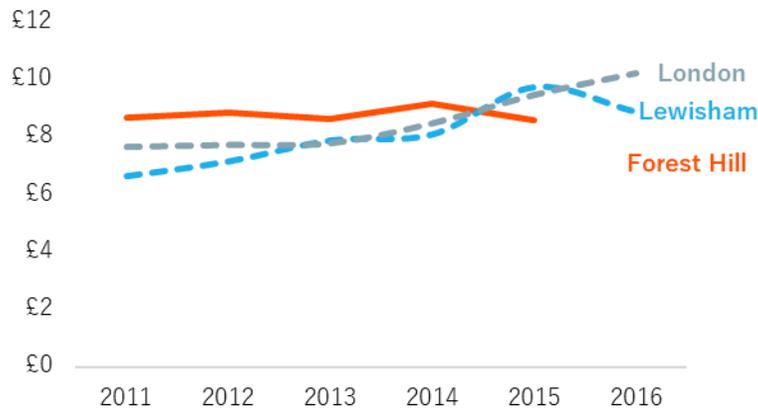
Data suggests that Forest Hill currently has **very little vacant office space** available in the town centre.

Office rents in the town centre have been **increasing at a faster rate** to the rest of the borough, with rents achieved of £25 per sqft; this compares to £18 across Lewisham.

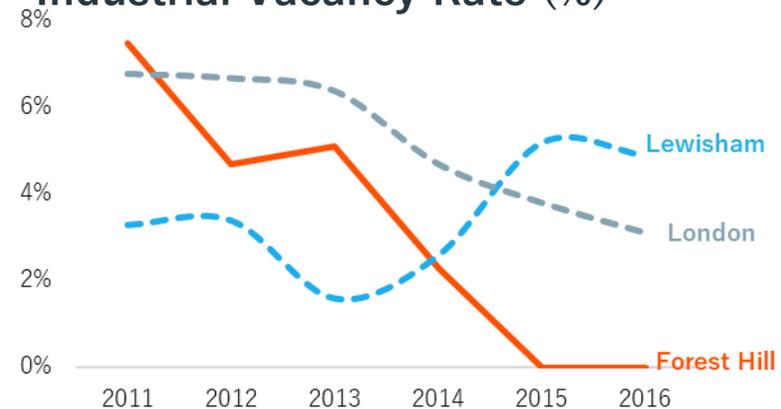
Source: CoStar, 2017

Commercial Property Market Performance

Industrial Rents (average / sqft)



Industrial Vacancy Rate (%)



Industrial rental values have remained consistent over the last five years, at around £9 per sqft. This price is very similar to the rest of the borough and London.

The amount of vacant industrial space has been **decreasing rapidly** over the last five years, and there is currently very little vacant industrial space available in Forest Hill.

Source: CoStar, 2017

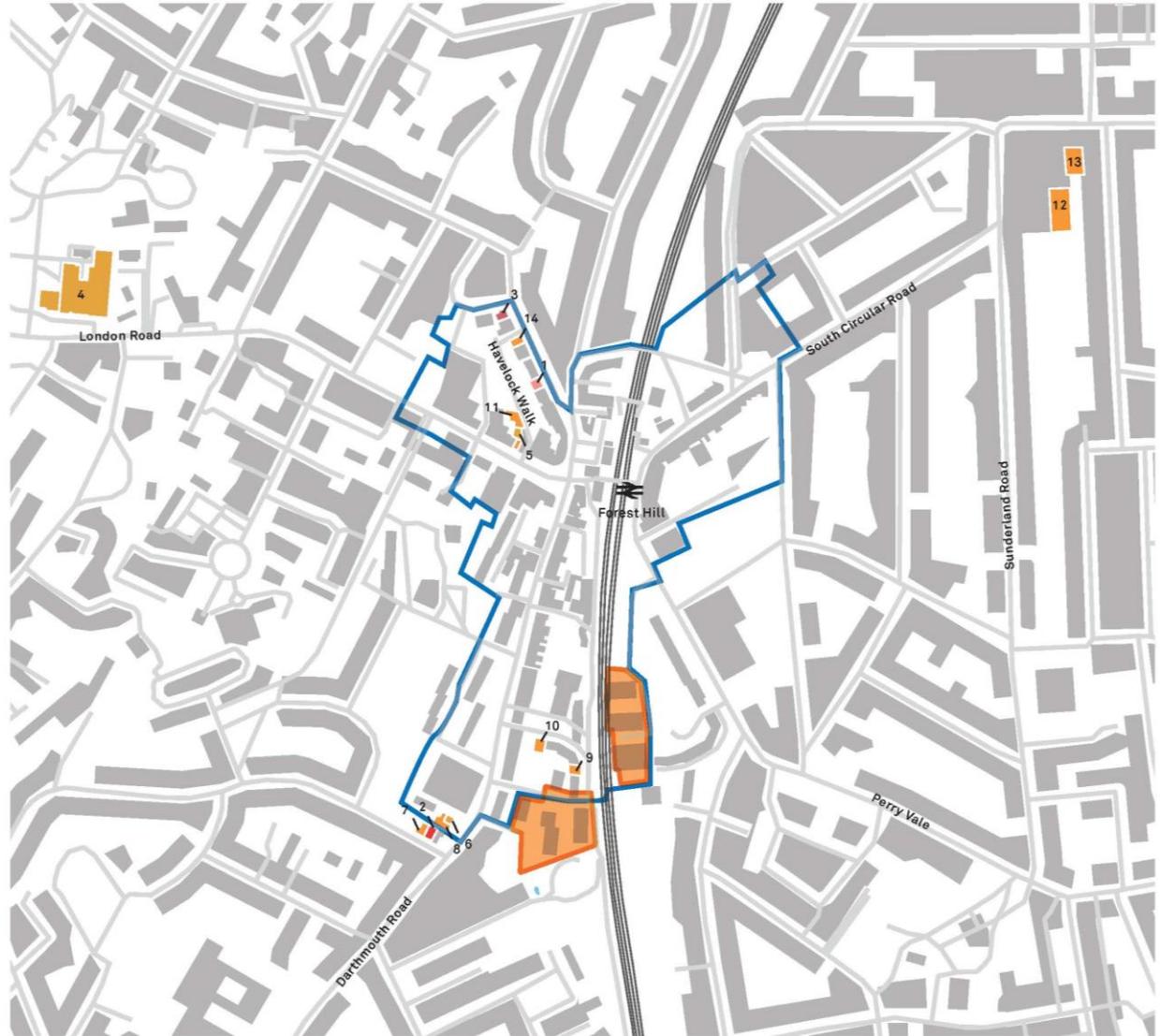
Observational Mapping

Core creative & digital businesses

- Architecture
- 1. Beep studios
- Design: Product, graphic & fashion design
- 2. Forest Hill Library (V22 co-working space)
- Publishing
- 3. Small print books
- Museums, galleries & libraries
- 4. Horniman Museum
- 5. Canvas & Cream (gallery)
- 6. Louise House (V22) gallery
- 7. Forest Hill Library
- Music, performing & visual arts
- 8. Louise House (V22) artist studios
- 9. The Fold Studios
- 10. Novacane Studios
- 11. Canvas & Cream artist studios
- 12. Whirled Studios
- 13. Transition mastering studios
- 14. Place in Print

Planning policy

- Local Employment Area
- District Town Centre



Observational Mapping

Activity cluster

Forest Hill features a clustering of creative and digital activity in live/work provision as well as new developments on Clyde Terrace. The area also features key cultural infrastructure such as Horniman Museum and dedicated artist workspace provision.

Workspace provision

- **Havelock Walk:** Organic 'live/work' cluster featuring a range of workspace units hosting office, artist studio and light industrial workshop spaces.
- **Clyde Terrace:** Mixed-use development that comprises 52 new apartments of which 10 are live-work units. There are 7 ground-floor commercial units.
- **V22 Forest Hill Library:** V22 will provide a specialist art library as well as launch affordable shared workspace within Forest Hill Library. This will be a mixture of self-contained offices and studios and shared deskpace.
- **V22 Louise House:** Currently provides 15 self-contained artist studios and is set to provide deskpases in one of the studios later this year. Louise House also features a gallery and community space.
- **Whirled Studios:** Forest Hill location was opened in 2010 and provides workspace for some 30 artists, with studio sizes ranging from desk space to 450 sqft individual units.

Notable sectors and businesses

Creative activity found in the area fall predominantly within the following sectors: Architecture, Design: Product, graphic and fashion, Museums, galleries and libraries, Music, performing and visual arts.

Forest Hill Library and the Horniman Museum are significant cultural infrastructure in the area, presenting opportunities for cultural consumption.

Placemaking activity

Artist studio provision on site hosts open studio days, inviting the public in to visit the workspaces. The Horniman Museum hosts a range activity related to exhibitions and wider programming.



Havelock Walk, adjacent to the high street, features a clustering of creative & digital activity in an organic 'live-work' cluster.



Havelock Walk hosts a number of open studio weekends, for instance as part of the Dulwich Festival.



The units along Havelock walk host a range of workspaces including offices, artists studios and light industrial workshops.



Louise House, managed by V22, provides 15 self-contained artist studios. Later this year, it will also be offering deskpace in one of the larger studios.



V22 provides and manages co-working space within the Forest Hill Library.



Businesses located within Clyde Terrace include recording studios The Fold and Novacane Studios.

Key Findings from Observational Research

- **Strong clustering of creative studios and light industrial workshops** in an organic cluster of 'live/work' along Havelock Walk.
- Strong presence of **dedicated artist workspace** (Whirled Studios & V22).
- New provision of residential and commercial floorspace at Clyde Terrace also hosts music recording and production studios.
- The area features **key cultural infrastructure** (Horniman Museum & Forest Hill Library) which provide opportunities for cultural consumption.

Summary

- Rapid growth in **specialized and higher value activities**
- **Availability of space** is a major concern, with no vacant industrial and office space in the area at present
- Average business size smaller, with a high proportion of sole traders and home workers
- Connections to Horniman Museum play a role in shaping the creative environment, and help establish a **unique artistic identity** for the area

Facilitate the ongoing evolution of Forest Hill, creating a strong identity and close links to the Horniman Museum. Important need to support the provision of more workspace to meet the needs of creative and digital businesses in the local area.



Focus on...Catford

Headline Findings

Indicators	Catford Creative & Digital
Employment (2016)	c. 100
Businesses (2017)	c. 55
Employment specialisation vs. London	0.2
Employment Growth (2011-16)	+150%
Business Growth (2012-17)	+120%
Sub-sector specialisms	Museums, galleries & libraries; and IT

Catford has a **relatively small CDI economy** at present, although there has been very **strong business and employment growth** over the last five years (all be it from a small base).

Business Sectors

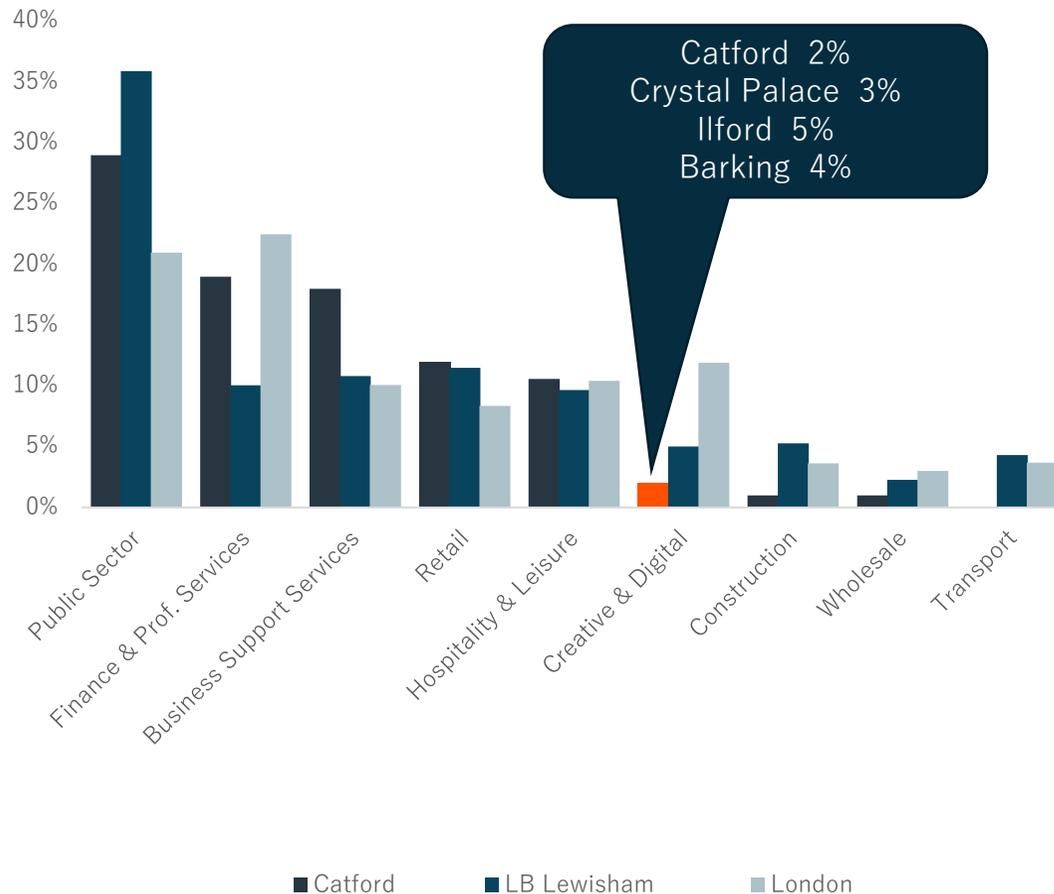
	Catford		Lewisham
Creative and Digital Sub-sector	Total Businesses	% Total	% Total
IT, software & computer services	25	45%	42%
Music, performing & visual arts	15	27%	15%
Design	10	18%	8%
Film, TV, video, radio & photography	5	9%	16%
Advertising & Marketing	0	-	9%
Architecture	0	-	0%
Publishing	0	-	3%
Museums, galleries & libraries	0	-	1%
Fashion Manufacturing	0	-	2%
Crafts	0	-	0%
Total	55	100%	100%

Note: Number of businesses rounded to nearest 5

Source: UK Business Count, ONS, 2017

Employment by Sectors

Proportion of total employment by sector (largest sectors shown), 2016



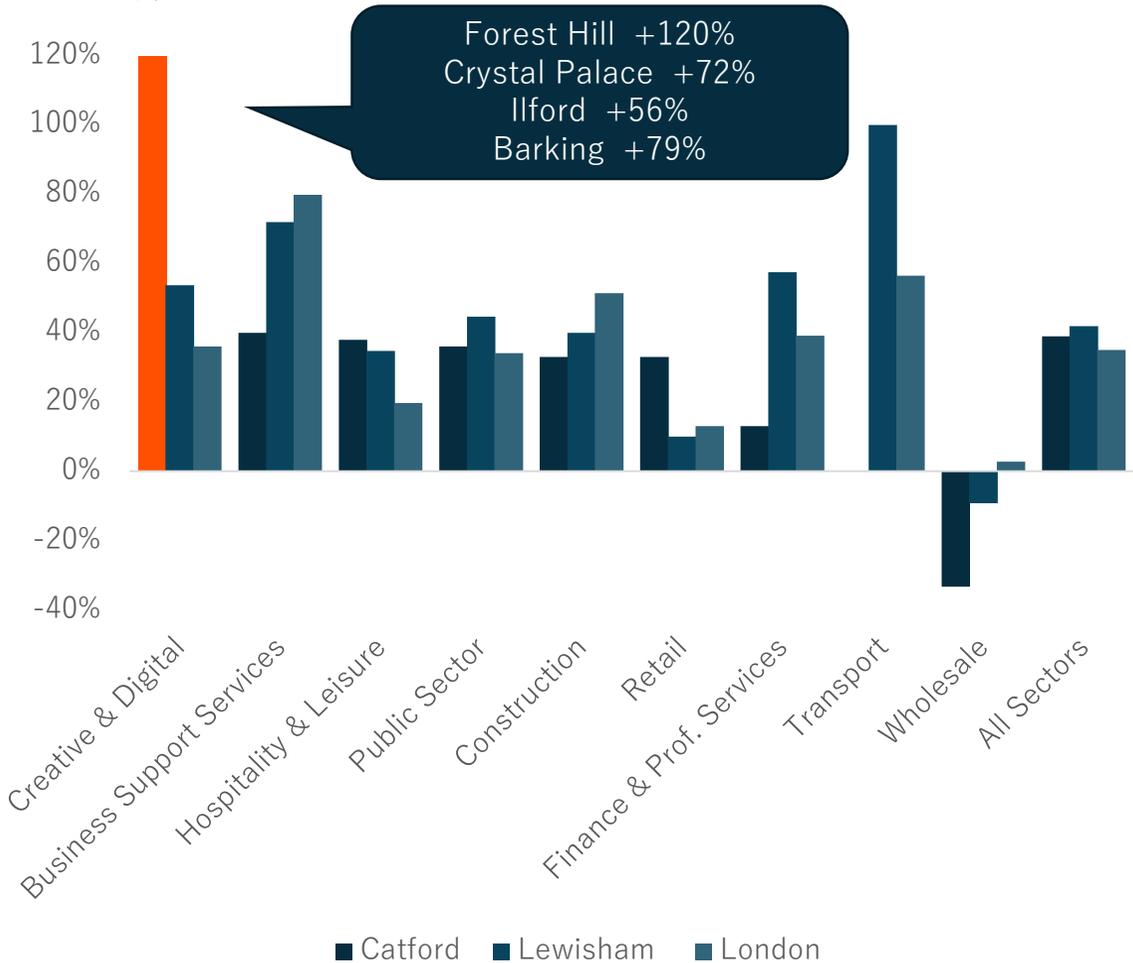
Catford's CDI sector has a lower proportion of activity than experienced across Lewisham.

Catford has lower levels of Creative and Digital employment than Crystal Palace, Ilford and Barking.

Source: BRES, ONS, 2016

Recent Business Growth

% Change in Number of Businesses (largest sectors shown), 2012-17



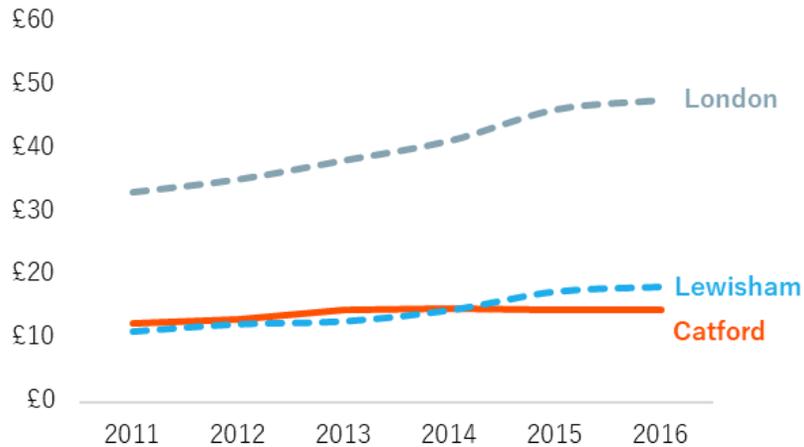
Catford has a **rapidly growing CDI sector**, with business growth of 120% over the last five years (all be it from a low base)

The CDI sector in Catford is growing at a far faster rate than experienced across Lewisham and London.

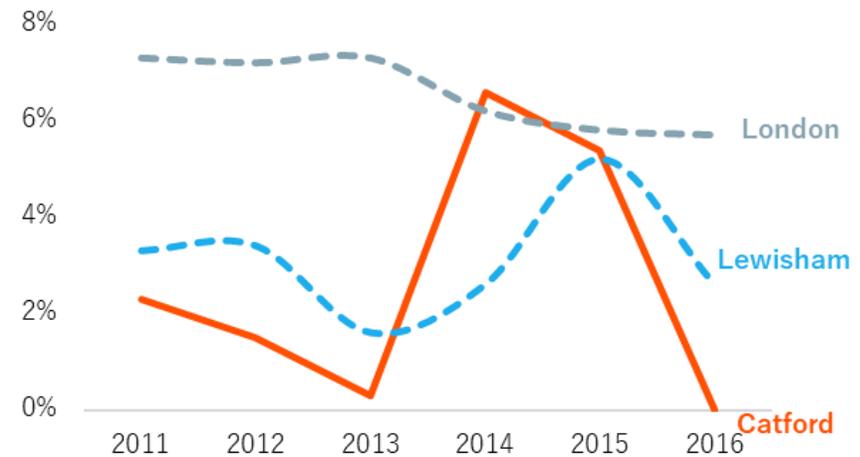
Source: UK Business Count, ONS, 2017

Commercial Property Market Performance

Office Rents (average / sqft)



Office Vacancy Rate (%)



Data suggests that Catford currently has **very little vacant office space** available in the town centre.

Office rents in the town centre are comparable to the rest of the borough, with recent rents achieved of £15 per sqft; this compares to £18 across Lewisham.

There is very little data available on industrial rents and vacancies, given the lack of industrial units in Catford.

Source: CoStar, 2017

Observational Research

Observational research in Catford is less detailed than for other town centres, given there is currently limited provision of observed creative & digital activity in the town centre. Evidence suggests that the following CDI activity is occurring in the following areas:

- Current workspace provision accommodating creative & digital activity is mostly tied to the Catford Dek. Managed by Bow Arts, the Catford Dek provides 36 studio spaces suitable for desk-based practices and makers.
- Presence of cultural institutions such as the Broadway Theatre, a grade-II listed building built in 1932
- Some degree of public facing creative activity with The Catford Arts Trail, an open house arts festival that invites local artists and makers to show their work in their homes or public spaces. The first edition was held in 2016, and this year's festival involved over 100 artists in 51 venues.

Summary

- Relatively **small** CDI sector in Catford relative to other town centres, however it has **experienced rapid growth** over the last five years
- **Availability of space** is an increasing concern, with very little vacant office space in the town centre at present
- **The Catford Masterplan** (expected to be developed in the next few years) will revitalise the town centre and **present opportunities** for the development of the CDI sector

An opportunity area for the future, with significant town centre development plans presenting an opportunity for developing the sector in the future (especially in light of recent growth). The significant amount of borough-owned land in the town centre presents opportunities for long-term creative workspace and imaginative approaches to meanwhile use.

Summary of Evidence



Summary of Statistical Evidence

Creative & Digital Activity in Lewisham Today

- Lewisham is home to a fast-growing creative & digital economy, with its recent development focused around four distinct locations: Deptford / New Cross, Lewisham town centre, Forest Hill and Brockley.
- Deptford/New Cross is the most exciting of these areas, with its connections to Goldsmiths University meaning it is one of the most important locations in the growth of London's creative & digital sector given its role in developing the capital's creative and digital talent pool.
- **Foundations for Growth**
- The current provision of CDI skills and business support within Lewisham is good, especially with the recently established DEKs providing sector-specific support to the CDI sector.
- Transport connections (especially along the East London Line) provide good access to existing creative and digital markets
- Across Lewisham there are constraints on office and industrial space (which is particularly pronounced around Deptford / New Cross), with very low levels of availability. This is limiting the growth potential of the CDI sector, with businesses struggling to find space to grow, or relocate to the area.

Summary of Observational Research

1. Lewisham features a number of distinct clusters of creative & digital and activity

- Each cluster is distinctive in terms of prevailing activity. The borough overall is therefore host to a varied range of creative & digital businesses.
- The range of activity is reflective of the range of workspace typologies on offer in each location, from railway arches, light industrial units and creative studios to incubator and small office spaces.

2. Lewisham has a substantial amount of artist workspace provision

- Lewisham has one of the most substantial provision of artist workspace of all London boroughs.
- The greatest concentration of individual artist workspace providers is found in New Cross & Deptford.
- Although individual tenancies within dedicated artist workspace can be transient, the overall typology nonetheless continuously caters to creative uses.
- This infrastructure is highly valuable in the context of the Mayor's upcoming Cultural Infrastructure Plan and Creative Enterprise Zones.

3. High-level education and cultural institutions are key in supporting creative & digital activity

- Institutions provide workspace infrastructure and events programming, supporting both individual businesses and wider public engagement with creative & digital activity in the borough.

4. Creative & digital activity in Lewisham is outward-facing and sustains ties to the local community

- A large proportion of creative & digital activity in the borough is public-facing (i.e. open studio days, galleries located within creative workspace provision, festivals, etc.)
- There is a high-level of community engagement as well as a strong presence of social enterprises within the wider creative ecosystems.

5. Creative & digital activity in the borough is located in close proximity to large-scale development and regeneration schemes

- The majority of the identified clusters of creative activity are located within or adjacent to large-scale mixed-use development sites or sites earmarked for mixed-use development.



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