

TeamLondonBridge

improving our district



London Bridge Revealed

The Brand Proposition for the London Bridge Area

Prepared for Team London Bridge and the Project Steering Group

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Report from Malcolm Allan

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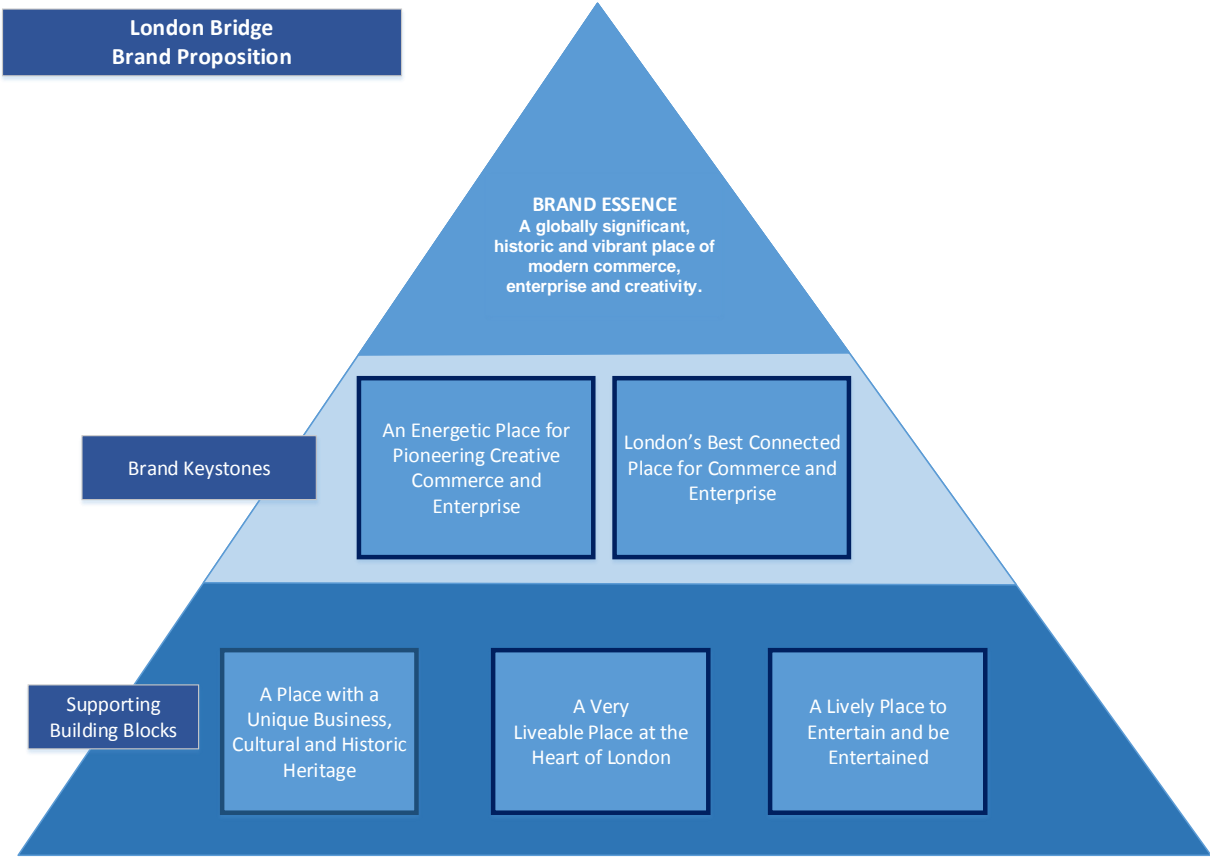
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1.0 Executive Summary

1.1 The Proposition in Summary

Exhibit 1 below illustrates, in outline, the brand proposition.



1.1.1 Brand Essence

The essence of the brand proposition is that this is:

A globally significant, historic and vibrant place of modern commerce, enterprise and creativity.

1.1.2 Place Characteristics

This is a place that can legitimately be characterised as:

- Unexpected and surprising
- Extraordinary
- Welcoming
- Pioneering
- Vibrant and stimulating
- Lively
- Energetic

- Making and creating
- With a very strong sense of living history from a unique past
- With a strong sense of community among both businesses and residents.

1.1.3 Brand Value Propositions and Messages

The core value propositions of the brand are that it's:

- An energetic place for pioneering creative commerce and enterprise – a very desirable location for corporate and independent business to operate and attract a skilled workforce.
- The best connected place in central London to locate and run a business, work and live.
- A very liveable place at the heart of London.
- A fascinating place at the heart of London well worth exploring which has a unique and significant business, trading and cultural history.
- A lively and vibrant place to entertain and be entertained in central London.
- A key place in central London to visit and learn about the history and development of the area and the city that surrounds it.

1.2 How We Got Here

This brand proposition has been derived from an extensive audit of the current offer and experience to be had in the area around London Bridge station, illustrated below in Exhibit 2, which identified a number of potential building blocks for combining to form a number of alternative scenarios for a brand proposition, illustrated in Exhibit 3 below. The area shown in Exhibit 2 below was derived from respondent's views about the area they considered as constituting the London Bridge area. There was no absolute agreement on what this area constituted and, as such, the map shows the widest interpretation of the area.

Exhibit 2 – Map of the Area Covered by the Brand Proposition

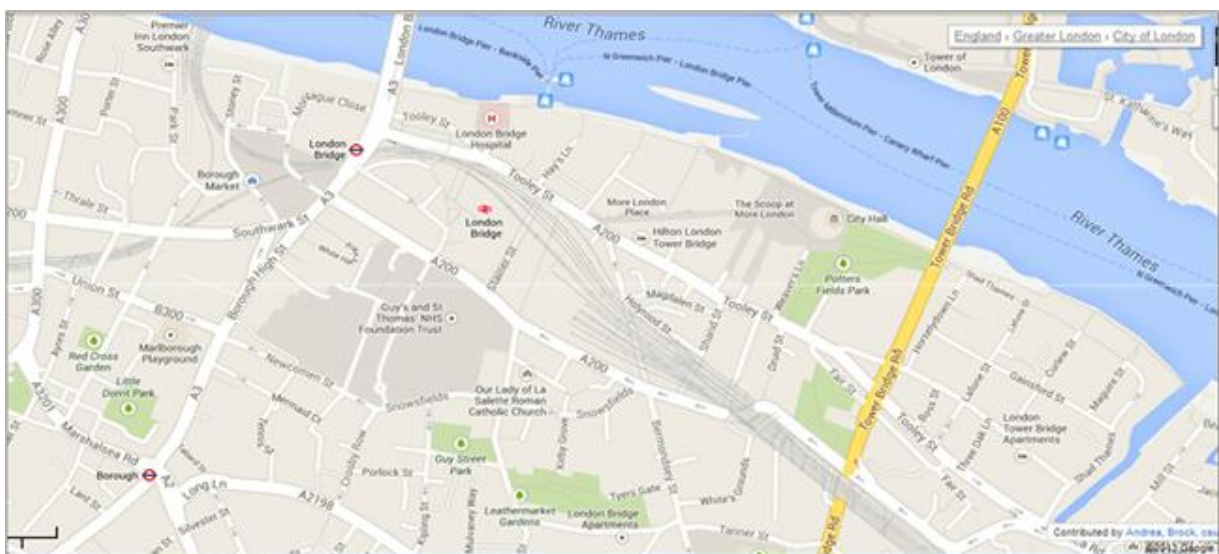
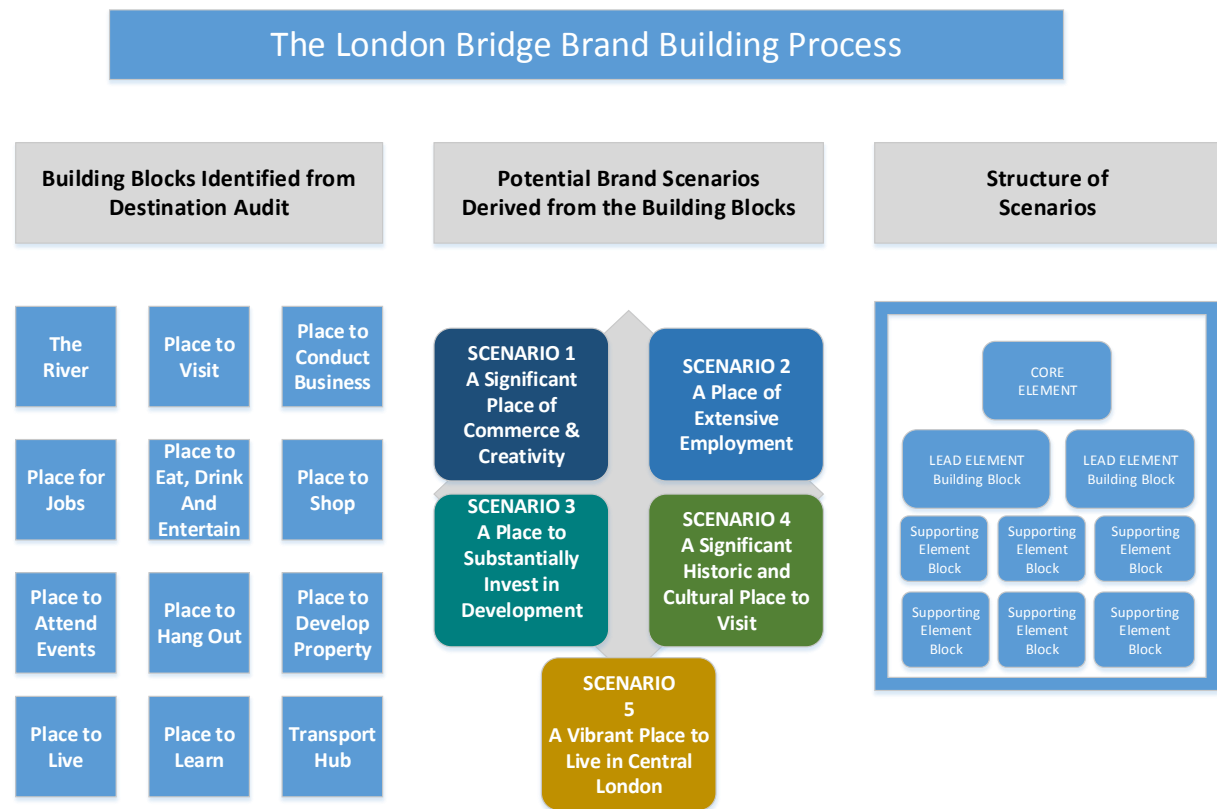


Exhibit 3 below illustrates the 12 potential brand building blocks identified from the audit of the current and planned offer of the area identified above and 5 potential scenarios for combining the building blocks into one or more brand propositions, such as the one in Exhibit 1 above, which emerged from the Steering Group discussion as the one which represented the strongest offer of the area in their opinion.

Exhibit 3 – Potential Building Blocks and Alternative Scenarios for a Brand Proposition.



2.0 The Brand Proposition Explained

2.1.1 What's a Brand Proposition?

The purpose of this report is to set out the draft brand proposition for the offer and experience of the wider London Bridge area.

In commercial and FMCG product branding a brand proposition is typically thought of as being concerned with the promise of the brand and the benefits you say customers will derive from using your products or services or the problems the brand will solve for them.

In place and destination branding terms we think of the brand proposition as being the description of what's on offer in an area – for example facilities, services, infrastructure, events and programmes, and the experience on offer in the area – for example ease of access to the offer and the way you are treated when accessing it.

Places and destinations are also inherently much more complex than products and services and, in consequence, their brand propositions tend to be more extensive and can be more complex.

However, a good place brand proposition should be simple and easy to understand no matter how extensive its offer.

We need to keep in mind that a brand proposition is promise that a brand makes and it is critical that brand's promise is easy to understand, engaging, unique, relevant (to the target audience), and consistent across its offer; and it should address its audience's current needs and wants and their future aspirations.

And a good brand proposition should be able to connect with its audience on an emotional level as well as on a practical tangible benefit or problem solving level - a strong emotional connection can create valuable brand equity, e.g. people and business feeling good about being in the place or when visiting the place.

2.2 The Agreed Brand Proposition

Taking the analogy of an archway or a portico, the agreed brand proposition consists of five building blocks – two key stones and three supports, namely:

Essence

A globally significant, historic and vibrant place of modern commerce, enterprise and creativity.

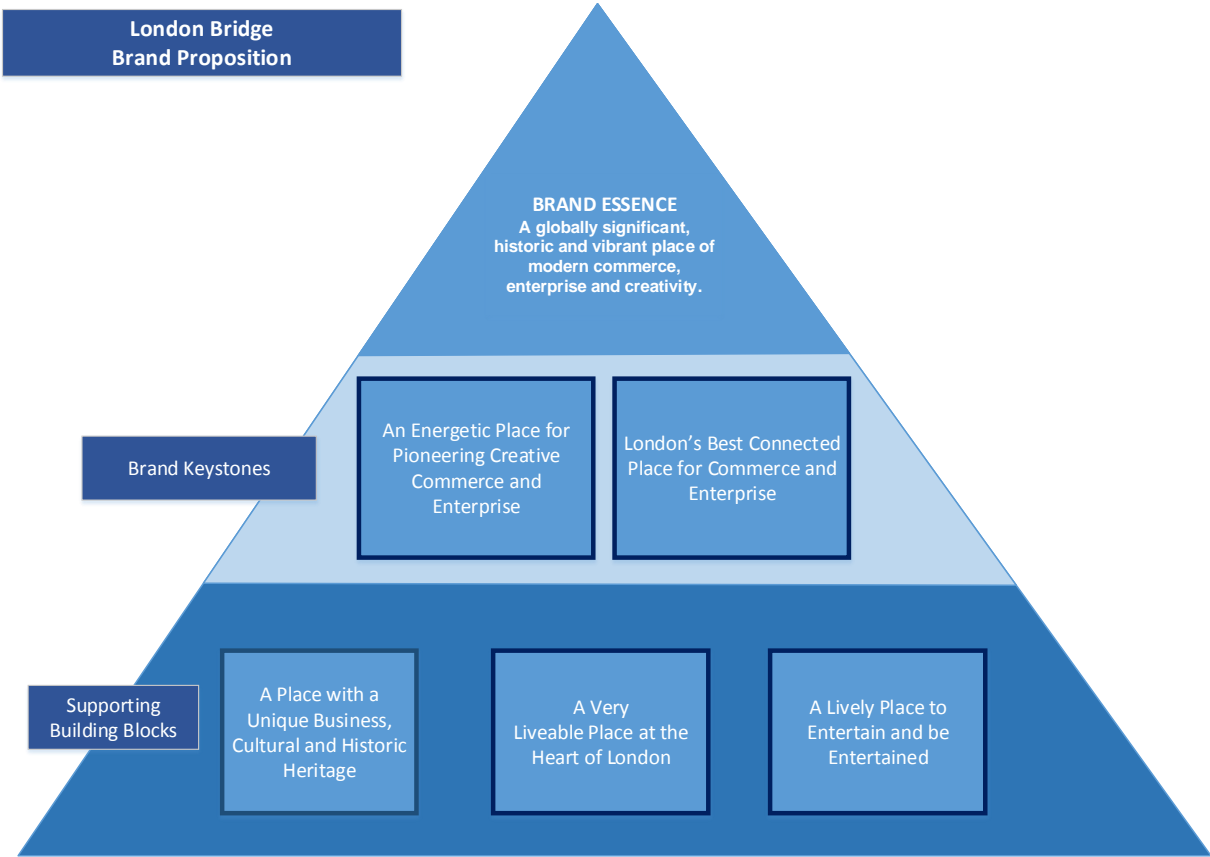
Keystones

1. An energetic place for pioneering and creative commerce and enterprise.
2. London's best connected and accessible place for commerce and enterprise.

Supports

1. An historic place at the heart of central London and London's history with a unique and substantial commercial and cultural heritage.
2. A very liveable place in central London.
3. A lively place to entertain and to be entertained in central London.

Exhibit 4 – The Chosen Brand Proposition for the London Bridge Area.



2.3 The Rationale for the Proposition

The rationale for the selection and combination of these building blocks is a combination of a major essence of the area and a number of its attributes:

Brand Essence

The essence of the brand proposition is that this is a globally significant, historic and vibrant place of modern commerce, enterprise and creativity.

Brand Attributes

The area has a number of significant and proven attributes.

Business, Commerce and Trade: The area has always been a place of commerce and enterprise , with a significant heritage of a strong global perspective, a heritage that is again evident in the location in the area of global commerce HQ’s and major branches of businesses that operate internationally.

Connectivity: The area has always been well connected and a place of interchange through the six or more bridges across the Thames that previously existed in and around the current location of London Bridge, through its closeness to the former Pool of London and its docks, particularly in Rotherhithe, and through the accessibility afforded by the coming of the

railways into this part of London in the mid 19th century and the later development of underground lines to and through the area to south London and, latterly, to the Docklands and East London, all of which strengthened the area's position as a place of business, commerce and trade.

Now, with the modernisation and expansion of London Bridge Station and its associated retail and food and beverage offer, the attractiveness of the area as a place of connection, as a place to operate a business, as a place to find a job and as a vibrant place to live in central London, is being increased and it is still one of the best connected locations in central London.

Liveability: The area has always been a lively place to live with a lot going on and will remain so and as its connectivity is improved and as its attractiveness to business improves, it will become more attractive as a place to live and work and as a place to live to access the many offers, facilities and services of the area and the rest of central London.

Food & Beverage and Leisure and Entertainment: In the Elizabethan era the area played the role of being an energetic place, a place of liberty (from the rules and regulations of the City) and entertainments and in the Victorian era the area played the role of being the larder of London, a place where foodstuffs were landed from ships trading with the Empire which were processed to make a wide range of types of food products. More recently, as the area has developed as a corporate business location, it has seen a large number of cafes, pubs, and restaurants open in and around the station, Borough Market and along Tooley Street and Bermondsey Street, provision that also serves visitors to the area interested in learning more about its unique and substantial heritage and history.

Heritage and History: The area has played a central, significant and important role in the history and development of London and is continuing to do so with the area developing as London's newest and most modern location for corporate and global commerce, creative industries and independent retailing.

2.4 The Market for the Proposition

2.4.1 The Core Markets

The core market for the proposition are businesses, public organisations (LB Southwark and the GLA in particular) and their employees. It covers existing businesses and businesses who are looking for a central city location in London – be they large corporates or small to medium sized independents, entrepreneurs and start-ups. And it includes employees who currently work for businesses in the London Bridge area, people who would like to work in the area and people who would like to live and work in the area.

2.4.2 The Secondary Markets

The secondary markets include:

- People who commute to work in central London or who commute out of the centre to work in the inner city or the suburbs through the London Bridge transport hub who might be interested in accessing the areas improving leisure and entertainment, food and beverage and evening economy offer.
- People who currently live in the area.
- People who would like to live in the area.
- Developers and owners of property who are interested in developing it or renovating it for business, residential or mixed-use occupation.
- Residents of London and South East England and visitors from abroad attracted to the area by its history, its business and industrial heritage and its cultural heritage.

2.5 The Offer and Experience of the Proposition

Below we set out a description of the existing characteristics of the area, the current offer and experience it provides, its current value propositions, stakeholders aspirations for its future development and new “On-brand” value propositions.

The current and planned value propositions are the “proof-points” of the proposition – proof that it’s got substance, is realistic and achievable. These will drive future messaging about this brand proposition and its value offers under the “Parent” messaging campaign of “London Bridge Revealed”, the purpose of which is to reveal to target markets the range of value propositions and experiences on offer in and being planned for the area, offers which they may know little or nothing about, depending on their degree of familiarity with the area and their past experience of it.

2.5.1 Brand Essence

The essence of the brand proposition is that this is a globally significant, historic, vibrant place of modern commerce, enterprise and creativity. It’s the best connected place in central London, an energetic place attracting creative talent, a place to be innovative and creative in commerce and enterprise and a place that is very well networked to the global economy.

2.5.2 Existing Character

There are a number of characteristics which strongly typify the area, the brand proposition and the brand identity.

Unexpected and Surprising – The area has a strong range of powerful value propositions and a range of distinctive quarters within it that are, as yet, undiscovered by many people who travel through it or who work there and people who do not yet have a reason to be there. There is so much about the area to be revealed and experienced!

Constantly Changing and Evolving – The area has changed over history and continues to do so as it adapts to the changing demands of commerce, enterprise, residents and visitors.

Extraordinary – The area has an extraordinary range and concentration of different types of businesses, services, facilities, heritage sites, attractors, environments and experiences, and stories to be told about its past and current development, more so than most other central areas of London.

Welcoming – The area has a justified and valuable historic reputation for being very welcoming of visitors and new businesses and residents attracted to it.

Pioneering - The area is known for being pioneering in its offer of business activities, services and products. It has been known as “The Larder of London”, a place where raw commodities were imported and where they were turned into a range of foodstuffs and where new foods and fruit from the world arrived and were in turn exported to the rest of London and the rest of the country. It was also the location of a number of innovative engineering companies involved in the great railway boom of the 19th century whose products were used to bring the railway lines into London Bridge and in the operation of the new suburban train services.

Vibrant and Stimulating – The area has been characterised as being busy, or vibrant in the modern sense of the word, for a number of centuries, being a place of many different types of businesses, many types of activities, with lots happening. It remains an energetic commercial area attracting a range of types and sizes of business from international corporate headquarters to small independent operations, including banking accountancy and business consulting activities, and a range of creative activities including architects, graphic designers, interior designers, software designers and engineers, and a range of types of business support service providers including office supplies, office furniture, property agents and companies specialising in building improvements and renovations.

This characteristic of the business life of the area is also typical of its appeal as a place to live and live and work. Put simply there is a lot to do in the area by way of local festivals, events and programmes. It is a very stimulating place to experience. And there is a growing and improving range of food and beverage establishments, many in independent ownership, catering for both residents and workers as well as tourists visiting the area; possibly the most varied concentration in central London.

Making and Creating – The area has been a place where many types of products were designed, created, made and manufactured for hundreds of years and it retains this powerful characteristic in sectors such as the arts, craft products, food products, fashion and clothing.

Connecting – For hundreds of years the area has functioned as a place that connected people and business to central London, the rest of London, the rest of the UK and to the Empire for business, trade and commerce. And it retains this characteristic today.

Strong Sense of Community – Despite the recent large scale of commercial development in the area it has managed to retain a strong sense of community, with many long term residents and attracting many people who prefer living in busy urban areas in city centres with access to many different kinds of jobs and lots of things to see and do.

Living History – The area is very strongly linked with the development of London, from Roman times through to the present and has strong historical associations with arts and culture, with artists and writers, with designers and manufacturers of products, with the development of key sectors of London's economy. The area is not a museum. It's very much alive. In its historical development it has retained a number of buildings that exemplify and illustrate its evolution, often adapting them for new or modern purposes. And its urban environment reflects that development and evolution and the adaptability of the area.

2.5.3 A Place of Modern Commerce, Enterprise and Creativity

Brand Promise – It is Central London's most vibrant and attractive and well positioned location for modern commerce, enterprise and creative people and businesses.

The Current Offer and Experience

Existing Value Propositions

Grade A Commercial Office Floor-space – The area has now one of Central London's largest portfolios of new and recently constructed top-quality office floor-space, much of it already let and occupied, which is clearly attractive to national HQ and international business operations requiring a central city location in a capital city, the most recent example being The Shard. It also has a considerable stock of recently refurbished high quality office floorspace in attractive historic buildings.

Grade B&C Commercial Office and Design Studio Spaces – The area has a considerable number of recent conversions and developments of historic buildings, for example on Leathermarket St, Morocco St and Bermondsey St, which accommodate small and medium sized creative, craft and design businesses, some with vacant space to let, which have proven to be attractive to independent businesses and small start-ups in those activity categories. This stock should be more widely marketed as part of any brand promotion programme.

Vacant Shop Units – The area has a number of vacant shop units ripe for improvement and occupation by independent retailers looking for a location in the area, for which there is a good level of demand.

Business Support Services – The recent growth of the area as a large corporate business location has attracted a significant number and a range of types of business support services, for example, marketing collateral design services, brand consultancies, product design services, office equipment and materials suppliers, staff recruitment agencies, computer software suppliers and designers.

Easy Access to a Regional Labour Market – The area is easily accessible to a sizeable labour market of people with a wide range of talents, skills and work experience, who can easily travel to the area through the services to and passing through the existing London Bridge Station transport hub.

Business Networking Events and Programmes – Team London Bridge run a comprehensive set of events throughout the year to stimulate contact between the businesses and organisations located in the BID area. This includes business seminars and themed workshops, examples being the Green Network Breakfast looking at how water is used in urban spaces, events as part of the capital's Urban Food Fortnight, an Active Listening and Communications Workshop and a Responsible Business breakfast briefing.

Street Cleaning Services – The BID Team has recognised that first impressions count and it actively works with statutory service providers to ensure the business district receives the attention it deserves. The area around London Bridge station (including Duke Street Hill, Railway Approach and Station Approach) is now cleaned up to three times extra every day 6am-6pm. Additionally a 6pm-9pm (Monday to Friday) sweeping service is now funded by Team London Bridge in this busy area. And extra weekly jet washing has been arranged for eight 'grot-spots'. This service is carried out in partnership with Southwark Council. This service provides an intensive, deep clean over several days in the busiest, most used areas of the business district. It includes gum and graffiti removal, washing down of street furniture, removal of fly-posting and so on. Intensive cleans have taken place in Tooley Street, Melior Street and Duke Street Hill carried out by Community Clean. Team London Bridge also work with Community Clean to provide a 24hour response service for graffiti removal and to deal with fly tipping.

Improving Safety and Security – The BID Team safety and security management service is the most valued by local businesses and residents and with the help of the Metropolitan Police the team has ensured that London Bridge has remained one of the safest areas in the capital. Crime has been falling for a number of years and their partners in Southwark Police continue to commit more resources to the area. The additional patrol hours (35+ per week) that the BID provides through its contract with the Police offers peace of mind as well as an active deterrent. The BID Team is also active in improving links between businesses and the Metropolitan Police, as well as the local authority, to reduce crime in the area, and to help make workers, visitors and residents feel safe - day and night.

The Southwark Community Security Zone (CSZ) – This initiative covers the area of northern Southwark between Tower Bridge and Blackfriars Bridge and is recognised by the Police as having significant political, cultural, economic and iconic status. The aim of the CSZ is to provide a safer, secure and more resilient place in which to work, live, visit and do business by developing and promoting the concept of community security. These objectives are delivered through a Security and Resilience Forum whose membership is drawn from organizations (both private and public) in the area, the Police, and Southwark Emergency Planning.

Urban Links Project – The BID Team want businesses based at London Bridge to be proud of their local area. Although it is already one of the most desirable addresses in Central London, the team realise that there is still room for improvement and are in the process of rolling out a programme of Urban Links Projects (capital improvements) as part of their Environmental Management commitment. Their projects have been established after consultation with local businesses to find out what they want and are designed to provide a better and more attractive network of spaces for people to use, linking communities and different built environments through innovative, interesting design and delivery.

Improved Street Signage – The BID Team are working with Legible London, a Transport for London (TfL) developed pedestrian way-finding system that's helping people walk around the Capital. It has been piloted in the West End and the South Bank and TfL is now working with boroughs, Business Improvement Districts and other landowners to expand the system. The

Team is partnering with Southwark Council, Potters Fields Park Management Trust and local landowners to deliver Legible London for their area.

The Aspirational Offer

The aspirational offer refers to proposals by current key stakeholders to improve the offer and experience to be had in the area.

Planned Value Propositions

Restored Railway Arches – The arches between London Bridge Station and Bermondsey Street not required for the station improvement programme will be available in 2018 for occupation by viable craft and retail businesses, start-ups and established businesses, increasing and expanding the range and type of business space in the area and expanding the range and type of businesses as well. This project will substantially improve the look and feel of Tooley Street and St Thomas’s Street and hopefully inspire Network Rail to extend the programme of works to arches east of Bermondsey Street.

London Bridge Station Retail and Food & Beverage Offer – A key element of the improvement programme of London Bridge station is the planned provision of approximately 1 million square feet of floor-space for new retail and F&B provision, whose target markets will be rail and tube travellers, local workers and residents and tourists visiting the area. This will substantially change and improve upon the current offer of the area. This is a value offer that will be of interest to retailers and F&B providers.

New Commercial and Mixed-Use Development Proposals – There are at least 8 known proposals for the construction of additional commercial and mixed-use floor-space in the area, as noted below, which will increase the ability of both major corporate and independent businesses to locate and operate in the area:

- The Quill on Weston Street
- Kings College mixed-use development on Borough High Street
- One Tower Bridge
- Colechurch House
- Fielden House
- Vinegar Yard car park site
- Melior Street scheme by Crest Nicholson
- Immigration Centre site.

This will be a value offer of quality floor-space that needs to be promoted to the international business marketplace.

Building Renovation Proposals – There are numbers of buildings in the area scheduled to be renovated to provide improved quality commercial office, design studio and manufacturing space for small and medium sized operators, and it is likely that more projects of this nature will follow as the business community becomes more aware of the overall offer of the area and its advantages as a location, particularly businesses in the design and fashion sectors and the “creative industries”. It is also likely to be stimulated by the presence of a number of established architectural practices operating in the area, some of whom specialise in building renovation and change of use.

2.5.4 A Place of Connectivity

Brand Promise – It's Central London's most accessible place to run a business, to work and to live, and to visit.

Existing Value Propositions

The London Bridge Transport Hub – London Bridge Station is a major destination asset for the area – its rail services from south London, Kent and Sussex transport an estimated 54 million people per year, many of whom work in the immediate area and many more walk across London Bridge to jobs in the City. To a growing degree it drives the local economy and has the potential to drive it to a far greater extent with the redevelopment and improvements being planned. The existing London Bridge Station, although currently being disrupted by the station improvement works programme, connects the area to South East England, to central London and the City, to London Docklands and its airport and to transport hubs on the north bank of the river Thames. This hub and its network of feeder lines and routes enable millions of commuters to access employment opportunities in central London on a daily basis which in turn makes the area itself very attractive to employers as a business location that's easily accessible for their staff.

The Aspirational Offer

Planned Value Propositions

The Improved London Bridge Transport Hub – When completed the station will have the largest concourse area of any station in the UK, creating 66% more space, new retail and station facilities. With entrances on Tooley Street and St Thomas Street, connections to and between the surrounding areas will be improved, supporting the wider regeneration of the area. Tube and bus links will be improved and lifts and escalators will provide step free access to every platform. The new station will also offer better travel connections – north to St Pancras, Luton, Bedford, Peterborough, and Cambridge; east to Ashford and Sevenoaks; and the south to Gatwick and Brighton. It will also make onward journeys easier – by tube, bus, bike, or on foot. More specifically the programme of improvements will increase passenger capacity by around two thirds and increase the number of tracks through the station, increasing rail capacity. New entrances on Tooley Street and St Thomas Street will improve integration with local bike, foot, or bus transport routes and improve accessibility to river services at the currently underused pier. lifts and escalators will also offer passengers step-free access to new shops, restaurants, and other facilities which will complement the ongoing regeneration of the local area.

The additional floor-space for retail and F&B operators which will be created in the improved station needs to be marketed as part of the brand proposition to the type of operators that stakeholders would like to see locating in the area. And the increased connectivity of the area as a place to operate needs to be marketed to the types of office, design studio and craft workshop activity businesses that stakeholders would like to attract into the area.

2.5.5 A Very Liveable Place

Brand Promise – It's a very liveable place that offers central London's most lively and varied central city living environment in an area of significant historic character.

Despite the area becoming popular as a place to locate a business, to attract and employ a workforce and provide it with jobs, it remains attractive to many people as a place to live and as a place to live and work. For people living in the area it has a range of attractions – access to the river, a wide independent and branded range of food and beverage outlets, streets with independent retailers, theatres, galleries, museums and an increasing and popular programme of events and festivals throughout the year, attracting an audience from across the south east of England and, for some events, such as shows at the White Cube Gallery and exhibitions at the Fashion and Textile Museum, an international audience.

Existing Value Propositions

Extensive and Improving Food and Beverage – Residents of the area have access to a wide range of food and beverage outlets which are improving in quality with new arrivals, with a strong offer from independent operators on Bermondsey Street and its environs.

Strong Independent Retail – Residents of the area also have access to a strong independent retail offer, concentrated on and around Bermondsey Street.

Range of Housing Types, Sizes and Tenures – Potential residents of the area have access to a wide range of housing types and tenures – social housing, rent and buy provision, private rented and housing for sale through individual or shared ownership, mainly in the form of flats with a small number of houses currently on the market offering good potential for repair and renovation.

Street Markets – Residents can take advantage of an increasing number of weekly, seasonal and specialist markets – such as the Bermondsey Square Antiques Market, the Spa Terminus/Maltby Street Food Market and the Borough Market Food Market.

Festivals, Events and Programmes – Residents can attend and participate in a number of festivals held throughout the year – an eclectic mix of offers and experiences that includes the London Festival of Architecture, the More London Free Festival (including music, theatre and film at the Scoop), which also has a series of “Fringe” events, The Mayor’s Thames Festival, Open House London, Tapas Fantastic at Potters Fields (live Spanish music, cookery and wine tasting), and the Bermondsey Street Festival, a traditional village fete. And for people interested in the arts and photography there are a number of exhibitions including jewellery made from glass, fashion from leading designers, products from industrial designers, contemporary painting by leading artists, and modern photography.

Cultural and Entertainment Programmes – Residents can access the programmes of a number of theatres in the area – such as the Greenwood, the Southwark Playhouse, the Unicorn Theatre, museums such as the Design Museum and the Museum of Fashion and Textiles, and art galleries such as the White Cube and Tate Modern.

Quirky and Historic Urban Environment – The environment of the area is a quirky mixture of the very modern and older streets and areas some with buildings dating back 400 years, many of which are preserved and in active use and a number which have been converted to accommodate new uses – places such as Shad Thames, Bermondsey Street, Morocco Street and Leathermarket Street.

Access to the River Thames – The area has one of the longest stretches of riverside walkway in central London which is easily accessible along its length from streets running off Tooley Street.

The Aspirational Offer

Planned Value Propositions

Railway Arch Retail – Residents will be able to access and benefit from the provision of new retail facilities that will be located in the modernised railway arches on Tooley Street and St Thomas’s St from London bridge Station to Bermondsey Street, and it is hoped that the tenants will be predominantly independent retailers and craft businesses.

Pocket Parks and Green Spaces – As opportunities present themselves there will be an increase the scale and variety of types of public realm in the area. The provision of new high quality and innovative public realm could be given priority as a form of planning gain and become a staple of Section 106 development agreements.

Potential Value Propositions

Environmental and Traffic Improvements on Tooley Street and Borough High Street –

The audit carried out to identify the current offer and experience of the area identified that there were significant environmental and traffic problems associated with the current use and management of Tooley Street and Borough High Street which negatively affects the experience of the area for workers, residents and visitors alike and reduces its attractiveness to potential residents, employers and employees.

The Steering Group for this project has recognised that these problems need to be tackled by key stakeholders as a matter of urgency and proposals for improvement developed, agreed and funded.

Improvement in the Supply of Convenience Retail Provision – The area suffers from a lack of shops selling everyday consumables beyond the typical Tesco Metro offer in order for it to sustain its attraction as a very liveable area. This deficiency needs to be remedied.

2.5.6 An Important Place with a Unique Commercial and Cultural Heritage

Brand Promise – It's central London's most interesting historic area with a unique, significant and interesting mix of attractions and environments, one that has played a major role in London's development.

Existing Value Propositions

The Built Heritage of the Area – The area has a wide variety of historic buildings, some preserved and some now in use for purposes other than what they were originally designed for, many making attractive locations for businesses, shops, restaurants, art galleries and product workshops, while others have been converted into residential apartments. These buildings date from the 13th century to the 20th century and while many are not protected by official preservation orders, they are of significant architectural interest for both locals and visitors alike.

The Industrial, Trade and Commercial Heritage – The area has a rich history as one of London's major centres of trade encompassing the import of foodstuffs, wines, cloth, clothing, the processing of raw materials into a variety of products, the development of the technologies that enabled the railways to come into the area on the largest railway viaduct at the time in the UK.

The Social and Cultural History – The area has been at the heart of London's historic and cultural development since before Roman times. It offers many insights on how past residents of London lived and worked, worshipped, were cared for when ill, took their leisure and were entertained, on its role in the development of popular English theatre.

Live Theatre – The area has a number of theatres which showcase traditional Shakespearian plays (the Globe) and modern productions (Southwark Playhouse), including a theatre dedicated to children (the Unicorn).

Modern Art – The area has two world famous art galleries the smaller of which is the White Cube Gallery on Bermondsey Street, the larger of which is the Tate Modern on the bankside.

Museums – The area has the UK's only Museum of Fashion and Textiles, located on Bermondsey Street and the UK's only Design Museum, located at Shad Thames.

Tourist Attractions – The area has a number of major tourist attractions related to its history and heritage, which support the brand proposition but do not drive it, principally Tower Bridge, HMS Belfast, and the Globe Theatre and more recently The View from the Shard.

Iconic Landmarks – The area has a number of buildings, structures and attractions that are well known and major landmarks – places which are more than just tourist attractions – the Shard, Tower Bridge and HMS Belfast for example.

The Aspirational Offer

Planned Value Propositions

Science and Art - King's College London, one of the world's leading research and teaching universities based in the heart of the capital, has announced its intention to open an innovative venue for science and art collaboration in the London Bridge area following capital funding awards totalling £7million.

Learn about the Arts and Crafts Movement – A museum and exhibition of the UK's Arts and craft's Movement is planned for a building in Tower Bridge Road.

Look Over London – An exhibition on how London developed, with a large scale model as its focus, is planned as part of the new Barclay Homes development adjacent to Potters fields Park.

Potential Value Propositions

Learn about the Area's Architectural and Built Heritage - There is scope to develop one or more architectural and historic environment tours and trails through the area enabling visitors and employees to learn about how the area developed and about the history of individual buildings of note and architectural interest.

Learn about the Area's Significant Events and Famous Residents of Note – There is similar scope to inform visitors and employees about the role that the area and numbers of its residents or habitués have played in the historic development of London and its central area over the last two Millennia.

2.5.7 A Lively Place to Entertain and Be Entertained

Brand Promise – It's one of central London's great places to eat, drink, socialise, to be entertained and to entertain colleagues, friends and family.

Related to the area's role as a place of business and employment is its growing role as a place to socialise in, to entertain in, to spend evenings and weekends in, largely created by the recent expansion in its food and beverage offer – a mix of national brands and independent operators, the latter often being situated in areas with an independent retail offer, such as Bermondsey Street, which increases the attractiveness of the area and its offer.

Existing Value Propositions

The Food and Beverage Offer – The F&B offer is, by and large, concentrated around or within specific locations such as the Shard, London Bridge Station, Borough Market, Hay's Galleria, More London and Shad Thames and along sections of the riverside walk, Tooley Street and Bermondsey Street.

Each has a different character and some have specialist offers like the world food offer at Borough Market, the executive dining at the Shard and More London and the gastro pubs on Tooley Street and Bermondsey Street.

Taken together they offer workers, visitors and residents a comprehensive sit-in or take-away lunchtime and after-work food offer, the latter contributing significantly to the emergence of an evening economy in the area and an offer that's also available for tourists and locals during the day and at the weekend.

The offer of the area has improved in a number of the clusters in recent years. For example the offer at the high end of the scale has recently improved with the opening of three new international brand restaurants in the Shard which complements the established offer of

national and international brands and some smaller scale upmarket independents in the More London area.

The offer of independents has expanded on Bermondsey Street and streets adjacent to it down to Bermondsey Square.

The fresh food to go offer at Borough Market is probably one the best known in London, has a good profile internationally. The offer includes foods from France, Germany, Italy, Mexico, Poland, Spain, Turkey, Vietnam, and more permanent stalls offering wines, cheeses, cold cuts and meats, breads and cakes, fish, olive oil, spices, fresh vegetables, coffee, flowers and plants.

The temporary and stall food offer of the market is complemented by a number of permanent pubs, cafes and restaurants including the Market Porter pub, Black and Blue, Fish, Gelateria, the Monmouth Coffee Company, Neal's Yard Dairy and Roast.

The Entertainment Offer - The wider London Bridge area has an extensive programme of events throughout the year, particularly in the summer months, consisting of a number of festivals, theatre performances, exhibitions, active and participatory experiences, food experiences, retail events and market events.

The festival programme is an eclectic mix of offers and experiences and includes the London Festival of Architecture, the More London Free Festival (including music, theatre and film and the scoop), which also has a series of "Fringe" events, The Mayor's Thames Festival, Open House London, Tapas Fantastic at Potters Fields (live Spanish music, cookery and wine tasting), and the Bermondsey Street Festival, a traditional village fete.

Complementing these free festivals are a series of "experiences" including gardening events, history events, storytelling workshops, experiencing life at sea on HMS Belfast, and London Bridge Live Arts.

The Public Realm and Its Entertainments – There is a good offer of public realm on the riverside between More London and Tower Bridge and at Potters Fields park close by. This area includes an open air amphitheatre called The Scoop outside City Hall which is used for live theatre, music and dance and for screening films.

Pocket Parks and Greened Spaces - The BID Team have been very active in the area with a variety of partners in bringing back unused or under-used open spaces to life as "pocket parks" – small spaces where people can sit and relax and enjoy a bit of relatively quiet relaxation, a good example being White's grounds Community Gardens.

The Aspirational Offer

Improved Quality of Provision – Responses from our consultation on this project indicated a strong desire among respondents to see improvements in the quality of the F&B provision rather than any significant increase in the number of operators or outlets.

2.6 Key and Core Messages about the Proposition's Offer and Experience

Based on the characteristics, current offer and experience and aspirational improvements for each of the brand building blocks described above we list below the core and key messages we believe need to be communicated to target markets about this brand proposition.

Central London's Most Vibrant Place of Modern Commerce, Enterprise and Creativity.

- Had many import/export businesses, clothing manufacturers, leather works and tanneries – it fed and clothed London.

- Places commerce in the heart of London, a place that now hosts HQ's of global businesses (e.g. PWC) and has attractions for corporates who want to feel at the centre of a global trading centre in a world city.
- Has a supply line of even more new corporate floor-space coming available over the next five years.
- Has attracted the interest of some of the UK's most innovative and imaginative property developers (e.g. Sellar Design and Development) and international architects – such as Renzo Piano.
- Attracts very talented people who want to work for global businesses or independent creative enterprises, who are attracted by an area of historical significance with good after work facilities and services – a good evening economy – and the opportunity to live locally in a vibrant urban area.
- Is a good location for creative businesses that serve the larger commercial corporates of the area and the nearby City – architects, designers, software engineers, advertisers, media companies, PR agencies.
- Offers lots of opportunities for the modernisation of older buildings for reuse as business premises for these support sector businesses.
- Offers businesses beneficial and profitable opportunities for local collaboration and networking.
- Offers people active in the workforce a menu of employment opportunities, possibly a larger range of types of jobs than most comparable employment areas in central London.
- Offers people who want to live close to this place of work opportunities to rent or buy low to high quality residential accommodation and opportunities to buy and rehabilitate property.

Central London's Best Connected Place

- It's a transport hub whose carrying capacity is being significantly improved.
- Is well connected to its employee supply region (south east England and Greater London) which is easy to get to by fast and improving transportation services and networks.
- Is an easy place to do business from as a result of its impressive connectivity.

A Very Liveable Place

- Has a range of amenities for employees, and those who want to live locally, soon to be more accessible with the opening up of the railway viaduct and its arches.
- Has retained its human scale, despite the Shard, and is a walkable place to work.
- Nice place to live if you like to live in busy and well served central city urban areas.
- Has significant architectural character and interest – an area of distinctive quarters that harmoniously exist alongside each other.
- Benefits from a strong independent retail and food and beverage sector which provides the area with a character of quirkiness and diversity as well as services for local residents.
- Benefits from a significant local employment market with jobs at many levels on the skill ladder.
- Is centrally located and very accessible.

- Has significant access to the banks of the river Thames and the attraction that is HMS Belfast.
- Has plans for significant improvement in its retail offer through development at London Bridge area.
- Has an extensive programme of festivals and activities throughout the year for different age groups.
- Has a good cultural offer – theatres, museums and art galleries.

Central London's Most Important Historic Business and Cultural Place

Messages About its Role as an Historic place of Business, Commerce and Trade

- Has been the larder of London.
- Has been featured in Chaucer's Canterbury tales, the venue for Shakespeare's plays, and the focus of some of the novels of Charles Dickens.
- Has played a major role in the railway age – both the construction of the first railway viaduct and a major railway terminus, and, as a place that designed and manufactured much of the machinery of the railway industry.
- Had many import/export businesses, clothing manufacturers, leather works and tanneries – it fed and clothed London.
- Values its historic built heritage – witness the proposals for rehabilitation of the railway arches.
- Place to explore to find out about the history of the development of London.
- Place to associate with history by working there, setting up a new business there or just visiting it.
- Place where history is apparent on many of the streets – where famous people have lived and historic buildings from at least four centuries and where history is immediately apparent by what's on the river banks.

A Lively Place to Entertain and Be Entertained

- Has historically been a place of entertainment, witness the Paris Gardens and bear baiting of the sixteenth century, the theatres of the sixteenth and seventeenth centuries, the coaching inns of the nineteenth century, the legal "red light zone" in Bankside and all of the pubs near the riverside that catered for sailors on trading ships.
- A place to relax after work and at the weekends – a place for congregation – a place to meet colleagues, friends and family.
- Has the potential to become a "tasting menu" for the range of cuisines of London's immigrant communities.
- Showcases international cuisines – from street food, through independents to five star Michelin restaurants.
- Offers a significant market for new food entrepreneurs to get a toe hold on central London's food market.

2.7 Messages for Core Audiences

2.7.1 Existing Businesses and Organisations

- The area will remain and become a stronger and more attractive location for business.

- New occupants in the area will boost the level of business for existing local suppliers of goods and services and creative businesses in the area.

2.7.2 Potential Businesses and Organisations

- The area is “en-vogue” to the cognoscenti at present as central London’s new place of business, while remaining largely under the radar of the major property firms in Mayfair and the west end.
- The area is very much open for business as a corporate location and as a location for enterprising creative start-ups.
- The area is a very different type of business location from the rest of central London characterised by its mix of services and activities, local residents and workers.
- The area has occupation opportunities for global businesses seeking to establish a presence in central London in an easily accessible location, in a place with a long history of association with the City of London and its markets.
- The occupation of the Shard and the Place will significantly increase the numbers of people working in the area and the spending power of the local workforce.
- The modernised railway arches will provide an opportunity for independents and small and medium sized businesses to locate in an improving area of economic growth.
- Modernisation of existing buildings and development of small scale sites will result in an increase in space for SME’s and independents.
- Its an easy area to attract employees to.
- There is a growing workforce with disposable income to be catered for by the retail and food and beverage sectors.
- This growth is likely to fuel demand for new and improved retail facilities, for cafes and restaurants and for quality supermarkets
- The improvement of London Bridge Station will provide an opportunity for retailers and food and beverage operators to locate in the area and service a growing market.

2.7.3 Existing Employees

- The area has a comprehensive and growing job market.
- The area has an improving range of food and beverage operations and a growing evening economy.
- The area is becoming increasingly accessible from all over the south east region.

2.7.4 Potential Employees

- The area has a comprehensive and growing job market.
- The area is becoming increasingly accessible as a place to live and work.
- The area has an improving range of food and beverage operations and a growing evening economy.
- The area has an expanding range of housing to buy and rent if you want to live and work in central London.
- The area has an extensive cultural, and leisure offer.

2.8 Messages for Secondary Audiences

2.8.1 Existing residents

- The urban realm is being progressively improved and “greened” through a variety of landscaping and planting initiatives.
- The streets through, in and around the railway arches are being better lit and will feel safer.
- A wider range of retailers will be attracted and accommodated in the area including convenience and comparison retailers, national brands and independents.
- Job opportunities in the area will grow for people with the required skills.
- The disruption caused by the station improvements will be worth it in the end (in six years time) in terms of improved urban environment, the creation of new spaces for businesses and new job opportunities in the improved railway arches and with retail businesses on the new station concourse.

2.8.2 Visitors to the Area

- There is more to this place than the major attractions of Tower Bridge and the Tate Modern. It is a place steeped in history, a place that has played a major part in the development of London over two millenia.
- It's very well placed as a base to explore London's attractions.
- It's a place well-worth exploring to discover its offer of historical sites and associations, its architectural gems and buildings, its specialist streets and markets, its festival and events.
- There is a year round programme of events and exhibitions in the area, not just at the peak of the tourist season and its worth exploring in the shoulder periods, the spring and the autumn and the Christmas period offer is improving.