THE LONDON BRIDGE PLACE IDENTITY PROJECT

Report on Research and Consultations

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HELPING CREATE SUCCESSFUL PLACES

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1. Introduction

This report forms part of the **London Bridge Place Identity Project**, commissioned by **Team London Bridge** in May 2013 and is meant to inform the larger Place and Destination Brand Audit for the project. The project aims to identify and crystallise the existing "place value" of the wider London Bridge area into a more coherent and cohesive story, a vision for the future, which can form an umbrella identity for the future of the area.

This is a report on **Stage 1** of the project – an intensive four week period of consultations to inform the Place Brand and effectively lead it into the right direction – taking into account the valuable insights and views of the people who live, work and play in the London Bridge area.

2. Context: The need for consultation

Like other brands, place brands exist in the mind of the consumer – which in this case, is the resident, the worker, the student, and the visitor to London Bridge area. Place brands therefore cannot be 'created', they have to be crystallised from existing perception and the inherent value of the place.

Perceptions about place also tend to be created over time, through functionality and experience. For any Place Branding exercise, therefore, it is critical to dig deeply and thoroughly into understanding how the people – those who live, work and play in the place – perceive it, what set of values and characteristics they deem inherently important to the place and how they see this value changing or evolving in the future. While different people might perceive the place differently, based on their personal use characteristics and experience of the place, the essence of the place branding exercise lies in an effective and sensitive crystallisation of these multitudes of views and weaving an insightful thread through them – to create the **Story of the Place**.

This then becomes the direction for the Place Brand, a collective vision for the future of the place.

3. Consultation design and strategy

At the outset of this project, the need to reach out to the entire community of London Bridge area was recognised. While Team London Bridge is the agency that manages the Business Improvement District of London Bridge, and therefore has a natural and easy reach to local businesses, it was more of a challenge and aim of the project to reach local residents and visitors through the consultation process.

3.1 Key Questions

The consultations aimed to seek answers to the following overarching questions:

- How do the people perceive the London Bridge Area? What, in their reading, are its key characteristics, attractors, positives and negatives?

- What is the spatial and cognitive perception of London Bridge area in the people's views? What area, and what key landmarks do they immediately think of when they think of London Bridge?
- How do the people rate its current set of attractors, services and amenities? What is its current value? How aware are they of its current offer and how would they like it change?
- What do they envision as the future of London Bridge area?

3.2 Channels

Four different channels of recording input from respondents were devised with the aim of reaching as many respondents as possible, and allowing for a range of means to capture their views based on their convenience and willingness.

These were:

- A quantitative and qualitative Online Survey (5-10 minutes)
- A free comments box – to allow respondents to add further comment on any issues they feel are not covered by the online survey (500 word allowance)
- An option for people to sign up for personal interviews (either face to face or telephonic) – ranging from 30 minutes to 2 hours.
- An additional regular survey conducted by Team London Bridge: key questions from the online survey for this exercise were appended to a regular survey that is emailed to a large number of Team London Bridge members to attract additional input.

3.3 Consultation Period

The consultation was conducted over a period of four weeks starting 7th June 2013 and ending on 5th July 2013. During this period, all channels were open and were being operated simultaneously by the consultation team, in order to capture the maximum response possible.

4. Results of the Consultation

A total of **519** people contributed to the consultation across all the channels listed above. The channel-wise breakdown of these is:

- Online Survey: 453 respondents
- Online comments box: 18 respondents
- Personal interviews: 48 respondents

In addition to this, Team London Bridge appended the key questions from the online survey to a regular email survey, which attracted about **50** additional responses. We have taken into account some of the qualitative responses from this into our analyses as well.

The following sections give a detailed analysis of the consultation data.

Section 6 of this report however derives the main conclusions from this data, as relevant for this place branding exercise – it is critical to not view this data in isolation, but to analyse it in context of the larger aims of this Place Branding project – which tend to be rather different to a regular marketing survey.

4.1 Demographics

While the project is being funded by Team London Bridge, an organisation focussed on the businesses in London Bridge area, it is of critical importance to the success of this project, that we include and invite participation from the entire community in London Bridge area – local resident communities, visitors to London Bridge area, whether for business or pleasure, as well as the employees of the several large and small businesses that operate out of the area, apart from the management and owners of these businesses that are members of the Business Improvement District.

As a result, special efforts were made to reach out to the other groups that would not otherwise form a natural respondent set to a project led by Team London Bridge, i.e. – local residents and visitors to the area. The following was the split of respondents across channels achieved as a result of this outreach:

- Business Owners / Businesses: **6%**
- Employees / Workers: **55%**
- Local Residents: **34%**
- Business Visitors: **5%**
- Other Visitors (Tourism / Social / Cultural): **8%**

These were split almost equally across males and females, with 50.6% females, 48.4% males and 1% respondents choosing not to state their gender.

The maximum number of respondents were in the **36-50 age group** (37%), followed by an almost equal number in the **25-35 and over 50 group** (25%), which is a very healthy spread across all ages.

It is significant to note that nearly **80%** of all respondents stated that they visit the area at least 3-5 times a week (i.e. they either live there, or visit very often, which is also corroborated by the percentage figures of type of respondents above), which suggests that most of the respondents have a large degree of personal insight and experience to lend to their survey responses.

4.2 Spatial and Cognitive Perception of the Area

At the outset, it was critical to know how people perceive London Bridge area spatially – where its perceived boundaries are, and which major landmarks they associate with the place. We envisaged that this would differ from person to person, based on their personal experience and usage of the place. A number of questions were therefore built into the surveys to help us assess this.

4.2.1 Recognition Keys and Spatial Perception

The three landmarks or places that most respondents identify as inseparable or most relevant to the London Bridge area are:

- The London Bridge Station **92.5%**
- Borough Market **73%**
- The Shard **72%**
- London Bridge itself **64.1%**

Not surprisingly, nearly 93% of respondents said, they first think of the **Station** when they think of primary place associations with London Bridge area. **Borough Market** seems to have a huge primary association with the name London Bridge, with nearly 73% of all respondents saying that they associate it very highly with the name London Bridge.

Interestingly, but perhaps not surprisingly, **The Shard** has already grabbed prime position when it comes to visual recognition and recall of London Bridge – 72% of all people rated it as one of their main place associations with London Bridge area.

It is interesting to note that a significant number of people also associate **Tower Bridge** with the name London Bridge - a third of all respondents highly associate Tower Bridge with the area – but not as high as we had earlier anticipated, given our own awareness of how highly Tower Bridge is associated with the name London Bridge on a more general, global level. This is likely due to the fact most respondents seem to know the area intimately, and therefore do not associate Tower Bridge with the area as strongly as in popular culture.

This however points to the degree of impact new, architecturally striking developments can have on an area, even on an area with such a strong degree of historical association as London Bridge, and therefore their potential impact on the overall perception and character of an area – something that the brand vision must take into account.

At the same time, London Bridge itself only stands at fourth place in this list, even though it lends its name to the place and even though our respondent set was intimately familiar with the area. This is perhaps a reminder of an opportunity waiting to be tapped – while London Bridge itself is not quite as architecturally striking as Tower Bridge, it has a long history, which, so far, hasn’t been explored and interpreted enough to be associated strongly with the offer of the area, even if it has lent the area its name.

4.2.2 Spatial Perception

Not surprisingly, most people’s spatial perception of London Bridge area completely disregards the BID boundaries (both Team London Bridge’s and Better Bankside’s) and tends to include a much wider geographical area than how the BIDs delineate the area.

Most people – whether visitors or people more intimately acquainted with an area experience the place through its offer, they navigate it based on their needs and experiences rather than by administrative boundaries. It is critical to remember in this exercise that while Team London Bridge does have an operative boundary, the place brand will inevitably have to disregard this boundary and follow popular perception of where London Bridge area begins and ends.

Based on a collated analysis of all the responses – both online and offline, the following map represents a rough reading of what a majority of respondents consider to be London Bridge area.

Fig 1: Perceived Spatial Boundaries of London Bridge Area based on Consultation responses

It is important to note here that this map is only an indication of what most respondents *perceive* as London Bridge area and is certainly not intended to be a definitive boundary for this exercise. It simply covers the most common physical ground, so to speak, that majority of respondents think of as London Bridge area. This includes respondents who think of a much smaller area than the one depicted, as well as respondents who, for instance, think of London Bridge to go all the way up to Canada Water in the east.

This is also not mean to suggest that this area is a homogenous entity - most people agree that London Bridge area is a collection of different zones, rather than one homogenous place.

An interesting comment on a personal interview suggested that The Shard has effectively expanded the *perceived boundaries* of London Bridge area – it is visible from a very large distance away, therefore the sense of being in or in close proximity to London Bridge starts from much farther away than it used to in the past. In this sense, for better or for worse, The Shard acts like a new “beacon” of sorts for the area, and any spatial and conceptual vision for the area must take into account this new reality.

It might even be necessary to select a smaller, more focussed area within this zone as the subject area or rather focal point for this exercise, as any place brand implemented in this area is very likely to exert its influence over a much larger area than originally intended.

4.2.3 Primary Characterisation of the Area

We asked respondents to objectively characterise the area – what they see is its primarily role and character, not necessarily reflecting their own personal use of the place.

Not at all surprisingly, most people see London Bridge as a **Business and Commercial Zone and a Major Transport Hub**.

This is followed by a secondary characterisation as **an area for Tourism**, and much less so as an **area for Leisure and Recreation**.

While it is not surprising that most people do not see London Bridge as a residential area, it is significant to note that a majority of local residents personally interviewed also agreed with this view. Only 27% of all residents rated the area highly as a residential zone, while the remaining majority do not see this as one of its prime characteristics.

4.3 Destination Characteristics

As mentioned earlier, people experience a place through its offer – the range of amenities, services, attractions and experiences and the quality thereof. This, combined with the way the place is managed, the ease with which they can navigate through these offers and the way these combine together to give them a holistic experience, is what determines the degree to which the place acts as a destination for these people.

It is also true that different people would rate different destination aspects differently, based on their priorities and what their primary activities in the place are.

It is only once these patterns of use are understood that a legitimate attempt to tweak or add to this offer can be made.

We therefore asked our respondents to rate a wide range of destination characteristics on a number of different scales.

4.3.1 Major visitor attractions

To begin with, we asked respondents to rate the top 5 visitor attractions in London Bridge area from a long list, and also gave them the opportunity to suggest further attractions if they were not included on the list.

We designed the list to include a fairly wide area, well beyond the BID boundary – and it was interesting to note the results.

Not surprisingly, **80%** of the respondents rated **Borough Market** as one of the top five attractions in the London Bridge area, with about 25% of all respondents rating it at the number one attraction in the area.

More remarkably, **The Shard** followed a close second with **70%** of all respondents rating it as one of the top five attractions in the area, with 16% of all respondents naming it as the number one attraction in the area.

These were followed closely by the **Tower Bridge, Tower of London, the HMS Belfast** and the large number of theatres in the area – although the Theatres were weighted heavily as number 4 or 5 amongst the top attractions in the area.

A large number of respondents also gave a very high weightage to the **Tate Modern** and **Southwark Cathedral**.

On the other hand, we deliberately included **London Dungeons** that have moved out of the area into our list to test their continuing association with the area, and the levels of awareness people have about attractions in the area. It is interesting to note that 150 people (i.e., a significant third of all respondents) actually rated London Dungeon as one of the top five attractions in the area. While we do have a healthy sample of respondents who know the area intimately and while a number of respondents pointed this out as a 'mistake' to us, it is quite remarkable to note that a significant percentage of these seem to be either unaware of the fact that London Dungeons do not exist in the area any more or continue to place emphasis on its association with the area.

4.3.2 Leisure and Recreational Facilities

Opinion on leisure and recreation facilities in London Bridge area seems to be rather mixed.

While a majority of respondents (**65%**) feel that the area needs to have more and better quality of green and open spaces, opinion about the number and quality of restaurants, cafes, bars and pubs is neatly divided down the middle.

Almost **half of all respondents** feel the need for more **cafes, pubs, bars and restaurants**, while the other half thinks that the area has more than enough of these at the moment. This would perhaps point to the need for a better range, diversity and quality of restaurants, cafes, pubs and bars, rather than more of these in sheer numbers.

The same is true of **gyms and sports facilities** – half of all respondents feel the need for more of these, while others think that the area has an adequate number of these facilities at present.

While our online comments box attracted a fair number of comments calling for a return of the closed nightclub Cable, an overwhelming majority of respondents on the online survey and in interviews (**82%**) vote against nightclubs in the area – pointing to the need for an alternative way to enhance the night-time economy in the area.

It is interesting to note here, that residents and workers in the area – the two major respondent groups seem to feel largely similarly about these offers. While residents predictably want more community facilities (53%), most residents think that there is enough in terms of cafes, pubs, bars, restaurants, gyms and sporting facilities in the area.

At the same time, while workers understandably don't care much for community facilities, they do seem to want more restaurants; specifically 53% of all workers would like to see more and better quality of restaurants in the area.

The one factor that all types of respondents overwhelmingly agree on is the need for more **green and open spaces** and better quality of these in the area.

4.3.3 Retail Facilities

While a significant number of people (**45%**) vote for **more high street brands and chains** in the area, this number pales in comparison to the number of people (**71%**) who would like to see **more independent retailers** in the area. Most people personally interviewed feel that independent retailers suit the eclectic nature of the area as well as its population well, but a balance may need to be struck between high quality independents and a smaller number of high street brands and chains to cater to the local demographic's specific needs.

In addition to the above, **60%** of all respondents would also like to see more **retail-led events**, like **pop-up retail** events and temporary events that add to the diversity of the offer and drive footfall into the area. A number of respondents felt that these should however be limited to touristy areas, and that these events should be organised with a more consistent and coordinated approach – through an overall strategy rather than more piece-meal and ad-hoc events.

Most people think that **Budget Retail** is overrepresented in the area, especially on Borough High Street, and with the changing demographics, should be replaced by **high quality Convenience Retail**, which they think the area sorely lacks. There seems to be an overwhelming demand for a Waitrose store in the area – as seen from both online and offline comments from respondents to this question, as well as gift shops, hardware stores like Robert Dyas and other general convenience stores. Interestingly, this is not only the view of residents but also the view of 49% of workers in the area, who would like the convenience of shopping for daily and weekly needs in the area before they head home.

Most respondents feel that the current food shopping offer is targeted only at the 'take-away lunches' population of week-days, and there is a serious lack of proper convenience shopping, not only residents as well as for the thousands of workers who commute in and out of the area every day.

This would significantly improve the area's standing as a retail destination for the people who use this place on a regular basis as a place to commute to or as a place of work, apart from the relatively smaller population that lives here.

4.3.4 Business Space and Facilities

65% of respondents on average feel that there is enough business space in the London Bridge area, with the only exception being space for small businesses.

Nearly **53%** of respondents think that London Bridge area could do with more and better quality business space for small businesses.

Amongst these, a large majority would like to see **more high quality space** for small businesses and sole traders, with the option for better flexible and temporary serviced space for business. 31% of respondents think that London Bridge area could do with better quality and more provision of flexible business space, but a majority (61%) felt that there is enough provision for this in the area.

While London Bridge is and has always been a predominantly commercial area, even with the large number of our respondents who work in the area, the overwhelming opinion seems to be that London Bridge has reached its commercial capacity at the moment. All qualitative comments demand better quality space rather than more space in sheer quantity, which suggests that the way forward for commercial development in the area might be **sensitive redevelopment and refurbishment** of existing commercial space, rather than adding more space for business in addition to what exists.

There certainly seems to be a demand for better quality space for small businesses and more innovative models for providing flexible and modular business systems rather than single use large floor plates.

4.3.5 Public Realm Assets, Initiatives and Facilities

There is an almost unanimous demand for **improvement in the public realm** in London Bridge. A number of comments cited street clutter, confusion, chaos, poor pedestrian and cycling experience, traffic congestion and widely differing public realm character (for example between the area around the Station as compared to the area around More London) etc. as problematic.

All the parameters listed under the above heading i.e., **Parks and Open Spaces, Way-finding and Signage, Walkability, Innovative Use of Incidental Spaces (arches, tunnels, alleyways etc.), Free public events etc**. are thought to be in need of improvement by a vast majority of the respondents.

Half of the respondents thought that way-finding and signage in the area needs improvement while the other half thought that it was acceptable in its current state.

Safety and security measures was the only parameter that was rated acceptable overall by a majority of respondents – a number of people interviewed feel that ‘softer’ measures like encouraging active use and vigilance in lonely areas etc., should be employed, rather than the more traditional hard-core measures of increased policing, CCTV’s and the like.

Concomitant to the point above, most respondents would like to see innovative uses in the arches and tunnels along the Railway and other such areas, which arguably would go a long way in making these zones feel safer. We are aware of the Arches and Tunnels initiative being concurrently run by Team London Bridge at the moment, and this feedback from respondents should do much to boost the very sought-after initiative.

Respondents to the personal interviews thought that the large amount of construction work in the area adds to the clutter and chaos and while not much can be done about construction work, importantly, respondents feel that not enough is done to manage the quality of public realm *while these are in progress*. Common complaints are frequently changing way-finding routes with inadequate on-site signage or awareness campaigns, street clutter, congestion due to construction activity related vehicles etc.

A number of respondents called for a more joined-up and proactive effort towards solving the problems of the quality of public realm in London Bridge area, as it varies starkly from one zone to another.

While we are aware that there is going to be continuing construction and therefore disruption in the London Bridge area for a number of years to come, managing the public realm effectively to minimise the impact of this activity on the people's experience of the area needs to be a prime aim in the future. A number of place making strategies (which are out of the scope of this report) can be adopted to manage this, which will go a long way in mitigating the negative impacts of these on the area, and therefore, its perception. It is for this reason that this will be a key factor to assess and address while propagating the place brand.

4.3.6 The Keyword Exercise

Additionally, we asked all respondents to choose **up to 10 keywords** from a long list of about 30 on the online survey and a free keyword list on the personal interviews to describe the area as they think of it now, and then again, in the future.

This was had two aims: a) to help back-up their characterisation of the area, and b) to provide the Place Brand team with a set of the most commonly recurring words in order to aid the characterisation and identity process.

The ten most common keywords that respondents came up with to describe the area as it is now, in order of priority were:

Busy	**76.3%**
Historical	**73%**
Touristy	**71.7%**
Crowded	**63.8%**
Chaotic	**45.6%**
Cosmopolitan	**44.1%**
Business Like	**43.2%**
Vibrant	**42.3%**
Cultural	**40.6%**
Modern	**33.3%**

The ten most common keywords that respondents came up with to describe the area as it as they would like it to be in the future, in order of priority, were:

Vibrant	**78%**
Friendly	**73.6%**
Exciting	**71.6%**
Cultural	**70.7%**

Historical	**69.2%**
Creative	**68.1%**
Cosmopolitan	**63.9%**
Innovative	**63.5%**
Beautiful	**62.1%**
Green	**61.2%**

While we weren't expecting respondents to choose any of the terms with straight negative connotations in the 'future' list, it is interesting to note that certain non-negative or neutral terms that appear prominently in the "now" list do *not* appear in the "future" list – **'Business Like'**, '**Modern**' and '**Busy**', for example.

At the same time, the future list saw the addition of new words chosen by the respondents that did not figure in the now list – that point to where popular opinion wants London Bridge to be headed – **'Exciting'**, **'Beautiful'**, **'Green'**, **'Creative'**, **'Innovative'**.

This might be taken to suggest that there are certain positive aspects of the place right now, which hold less importance for respondents when they think of its future, and that they might want certain other factors to take more prominence as the area evolves.

There were other positive-connotation words that figure prominently in both lists that indicate the essential characteristics that respondents think London Bridge area needs to retain: '**Historical'**, '**Cultural'**, '**Vibrant**', **'Cosmopolitan'**.

5. CONCLUSIONS: WHAT THIS MEANS FOR THE PLACE BRAND

Having closely analysed all the responses across the various channels on this consultation and weighted them against the larger aims of this project, the following are the key take-aways from this exercise for the Place Brand. These are, in essence, the **directional guidelines for the place brand** from the people who live, work and play in this area – and contain critical insights into the formation of a future vision for the evolution and development of the area.

These are also founding guidelines for the **Experience Masterplan** to base its aims on, at a later stage in this process, to carry the essence of the Place Brand forward.

- **Defining the boundaries**

  Evidently, identifying a clear or at least **core boundary** of what constitutes London Bridge area would be one of the foremost challenges of this Place Brand exercise. The map in Section 4 is a broad reading of what a majority of the 519 people consider to be London Bridge area, but this can only serve as a starting guideline for the brand. As mentioned earlier in the analysis, the Place Strategy will have to define a core area, which might be the **focal area** for the implementation of the place brand, but which will certainly not remain the only beneficiary of the new brand. Clearly, the existing BID boundaries cannot be the definition of this core area, but it will need to be led by careful consideration of the area's **core offer**, its **spatial and**

conceptual distribution and balancing it with **popular perception** – which has come out as a result of this consultation.

- **The London Bridge place brand needs to invoke the place's historical and cultural value along with a view to its continuing role as an important area of business and commerce.**

  London Bridge has always been one of London's pre-eminent areas of commerce and business. While this has been its primary role through its very long history, in the contemporary context it is equally an area of great historical and cultural interest, given its links back to Roman times, and its significance to London through the ages. In recent times, these two primary characteristics seem to be somewhat in disagreement with each other, and while objective opinion may be divided about this, from the consultations it is clear that this perception is certainly true in the minds of its people. The overarching challenge and aim of the Place Brand will therefore need to be **to reconcile these interests as complementary and mutually supportive, rather than competing.**

- **The place brand needs to take into account the essential heterogeneity of London Bridge area's character**

  The fact that London Bridge is a summation of a multitude of zones, a series of sub-brands almost, with sometimes nebulous boundaries, but nevertheless with a very strong impact on its identity, is a critical backdrop for the Place Brand. This will be the second most important challenge and aim that the Place Brand will have to address – **bringing the patchwork of characters and zones of London Bridge area into a single identity without diminishing their value**. In the process, a prioritisation of these sub brands would be in order – to bring out the most significant of these, which need to be tied into the overall place brand. If anything, the challenge of the Place Brand would be to give a 'leg-up' to all of these while creating an overall identity for the area that related equally to all of these parts.

- **The place brand needs to invoke London Bridge's uniqueness.**

  Related to the previous point, London Bridge area is **unique** – and quite unlike any other prominent city centre area in London. A large number of respondents feel that this uniqueness is its USP, and in their perception, the place is at the risk of losing this unique quality at this point. The overwhelming demand for independent, quirky retailers rather than the stock chain brands of the high street is a direct manifestation of this quality. It will be crucial for the Place Brand to carry forward and protect and project this unique quality, especially at the stage of translating the Place Identity into discrete projects on ground at a later stage.

- **The Place Brand needs to celebrate the Bridge and the River, more.**

  Almost all respondents feel the river is the area's biggest asset, yet a sizeable number feel that it is not celebrated enough in London Bridge area. Even more than the river, the bridge, London Bridge, that lends its name to the entire area, seems to be only a place of transit, and is not celebrated as frontage and heritage in its own right. When asked about associating major landmarks in the area to the name, London Bridge stood only at the fourth place, with other points of reference and landmarks far overshadowing it. Indeed, in popular perception, Tower Bridge is associated far more with the area than London Bridge. While there is certainly good reason behind this state of affairs – London Bridge is not nearly as architecturally significant or striking as Tower Bridge, or indeed the other bridges spanning the Thames in Central London. Yet, it does have enough significance in the history of London to have lent its name to the area, a name that enjoys global recognition (but a name that is associated wrongly with Tower Bridge in popular culture, more often than not). It should perhaps be one of the aims of the Place Brand to try and reconcile this anomaly by celebrating the bridge that is so fundamental to the area's identity, and doing so alongside a celebration of the area's proximity and essential links to the river itself, making them more prominent, more recognisable – both geographically and cognitively.

- **Quality not Quantity**

  From the consultations it is clear that while there is a clear demand for certain amenities – better convenience shopping, independent retailers, small and flexible business space, public realm initiatives - most people would like an emphasis on the right mix of these, rather than a blanket provision to increase numbers. For an area as unique and eclectic as London Bridge, this is an important thing to keep in mind for the future of the area – and especially while designing the Experience Masterplan for the place.

These conclusions form the crux of the challenges for the Place Brand as well as the overall direction in which it would need to evolve.

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