



Department  
for Culture  
Media & Sport

## Report 5: Post-Games Evaluation

Meta-Evaluation of the Impacts and Legacy of the London 2012  
Olympic Games and Paralympic Games

SUMMARY REPORT

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Department for Culture, Media & Sport

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# Introduction

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One year on from the London 2012 Olympic Games and Paralympic Games ('the Games' or 'the 2012 Games') this report provides an assessment of their impact and legacy. With at least a 10-year timeframe, there are obviously still many legacy benefits to be realised and impacts to be unpicked. However, by focusing on the evidence currently available, this report provides a robust assessment of the emerging Games legacy, showing that there is already much that can be said about how the Games have impacted on places, organisations and individuals.

## Introduction to the meta-evaluation

The 2012 Games was one of the largest events ever hosted in the UK and a key element of London's bid was the commitment that the Games would result in a lasting legacy for the whole of the UK. It was a commitment that was subsequently reflected in the overall vision for the Games as the Government sought to use the power of the Games to inspire lasting change – before, during and after.

In light of this commitment, the Department for Culture, Media & Sport (DCMS) commissioned a consortium led by Grant Thornton, including Ecorys, Loughborough University, Oxford Economics and Future Inclusion, to undertake a comprehensive and robust 'meta-evaluation' of the additionality, outputs, results, impacts and associated benefits of the investment in the 2012 Games.

This commission went beyond anything that has been done before in trying to understand the difference made by hosting an Olympic and Paralympic Games. It was driven by a real desire across Government to understand the impact of the Games and the role they have played in creating lasting change. At this stage, it is not possible to know the extent to which many of the positive findings identified through this meta-evaluation will be sustained. It is something that will need to be assessed over the longer-term.

## This report and the approach adopted

This report looks at the impact of the Games through the lens of 12 headline findings. These findings are based on a detailed evidence base that has been collated over a three year period, with the evaluation team working closely with those involved in delivering the Games and its legacy, as well as those involved in researching its impact. This has resulted in the creation of a comprehensive evidence base that has enabled a robust assessment to be made of the success and impact of the Games in delivering a lasting legacy.

Given its breadth, the evidence base runs to hundreds of pages and draws on many thousands of pages of data, research and evaluation activity that was comprehensively reviewed, assessed and synthesised (following an academically informed approach to ensure rigour<sup>1</sup>). The evidence base is available in two parts. The first provides summative answers to the project's research questions and the second provides the detailed evidence base that sits behind each of the four themes that formed the organising structure of this evaluation (Sport, Economy, Community Engagement and the Regeneration of East London).

The remainder of this report looks in turn at the 12 headline findings.

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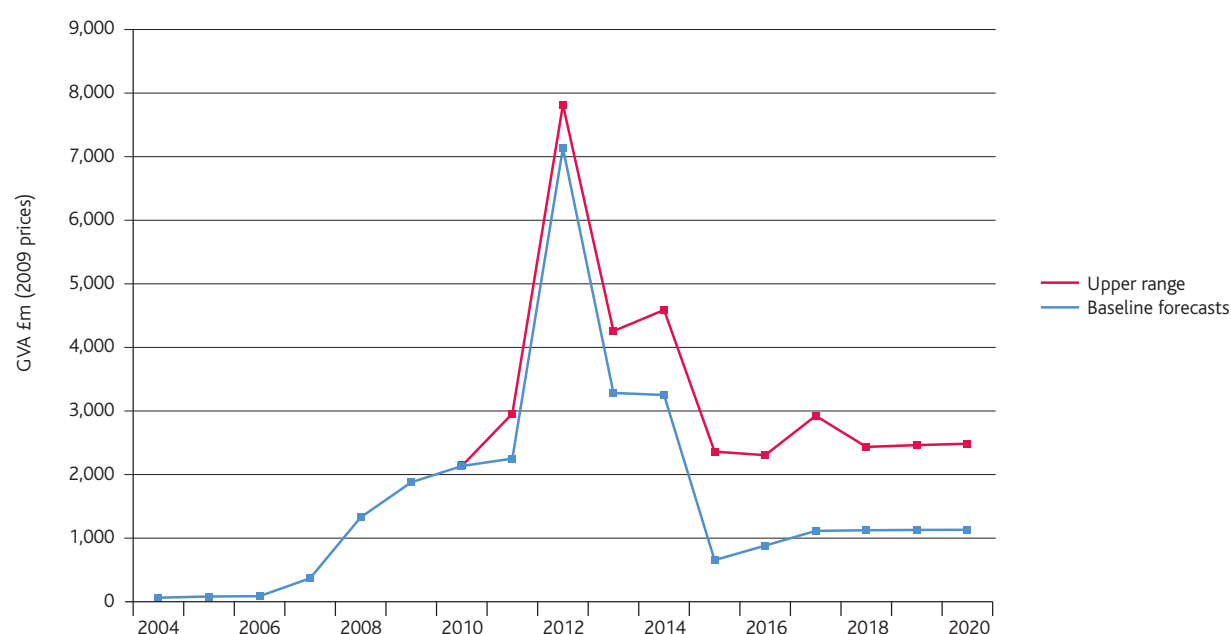
<sup>1</sup> Due to the innovative nature of the meta-evaluation, the Economic and Social Research Council (ESRC) part funded the project to enable it to make a contribution to advancing meta-evaluation methods. The results of associated work by the ESRC are to be published separately, later in 2013.

# 1 The Games have provided a substantial boost to the UK economy

Preparing for and staging the Games have provided a substantial boost to the UK economy, helping to counter the effects of the economic downturn. Bespoke economic modelling utilising an input-output framework suggests that the impacts which can already be clearly identified at this early stage will in total generate some £28 billion to £41 billion in Gross Value Added<sup>2</sup> (GVA) (Figure 1-1) and 618,000 to 893,000 years of employment by 2020.

These estimates take account of the spread of impacts down the supply chain and the resulting generation of economic activity through consumer expenditure. The figures up to the end of 2012 have already been realised and have a high degree of confidence. There is always inherent uncertainty around future impacts and as such a range of potential impacts is presented to reflect the extent to which they may materialise, could displace other activity, or might have happened in the absence of the Games.

**Figure 1-1: Estimated net GVA, 2004 to 2020**



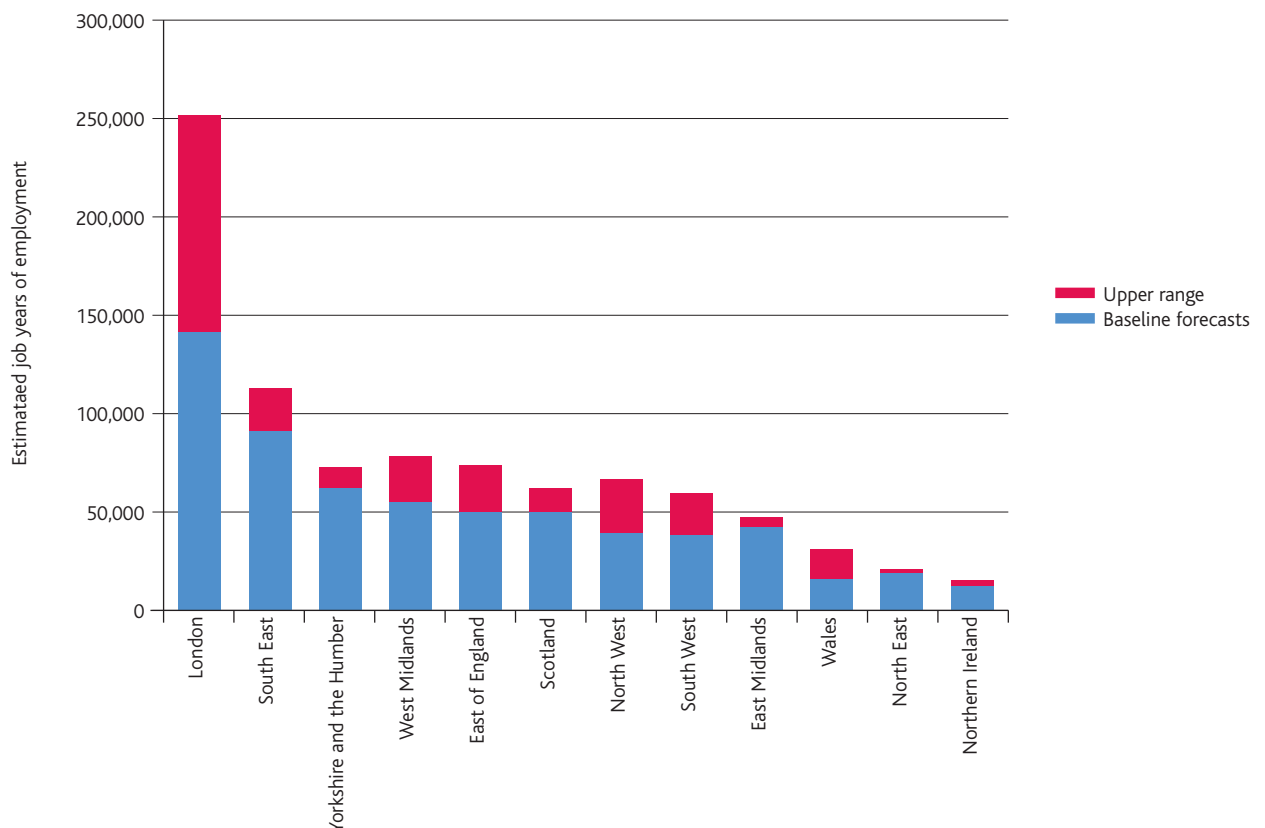
Source: London 2012 Olympic and Paralympic Games – Economic Modelling

<sup>2</sup> Gross Value Added (GVA) is a measure of the value of goods and services produced in an area, industry or sector of an economy..

Underpinning these impacts is the boost to demand from the £8.9 billion Public Sector Funding Package and the additional £2 billion of privately financed spending by the London Organising Committee of the Olympic and Paralympic Games (LOCOG). The construction of the Olympic Park in particular provided a major stimulus to the construction sector at a time when it had been hard hit by the recession. The 'administrative and support' sector also derived substantial benefits but all sectors derived some benefit, with 'manufacturing' seeing significant supply chain impacts. Developments in East London such as Westfield that have been catalysed by the Olympic Park development have generated further benefits for the local area.

The economic benefits of this stimulus have been experienced by all regions and nations of the UK (Figure 1-2). Initiatives, such as CompeteFor, which were specifically established to open up the opportunities to bid for Games contracts to the widest possible range of businesses, have helped to secure this spread of benefits.

**Figure 1-2: UK regional employment estimates 2004 to 2014**



Source: London 2012 Olympic and Paralympic Games – Economic Modelling

A key component of the economic legacy of the Games comes from trade and inward investment that has been secured because of the Games and the related promotional activity. The Government adopted a target of securing £11 billion of inward investment, high value opportunities and additional sales for supported businesses by 2016, using events such as the British Business Embassy and overseas campaigns such as GREAT, and £10 billion of this has already been delivered. The Games and related promotional activities have clearly influenced perceptions of the UK as an investment destination, instilled confidence in companies about the future of their UK operations and helped UK businesses to access new export markets because of Games-related contracts.

In addition, with over 800,000 overseas visitors attending an Olympics event the Games brought economic benefits to the tourism sector. Although total visitor numbers during Games time actually fell, the high levels of spend by Olympics visitors meant that overall there was a net boost of almost £600 million to the visitor economy, excluding ticket sales. Domestic visitors provided a further net boost of over £360 million, although it is less clear how far this was additional at the level of the wider economy. For the future there are also encouraging indications that the Games have had a positive effect on perceptions of the UK as a tourism destination. Associated marketing campaigns, such as GREAT, are influencing potential visitors intentions to come to the UK, which should generate further benefits to those in the analysis above – and there is a clear strategy to continue to build upon the Games (see headline finding 5).

The Games also represented a one-off opportunity to provide workless people with a pathway to sustainable employment. An estimated 62,000 to 76,000 workless Londoners secured temporary or permanent employment as a result of the Games, and there are clearly some potentially significant longer-term impacts still to emerge from effectively reengaging previously workless people within the labour force. Many people received skills training to prepare them for working on the Games, including many workless individuals, and these new skills can be applied long into the future.

Other less easily quantifiable aspects of the Games longer term economic legacy include:

- The potential competitiveness and resource efficiency benefits from the diffusion of the sustainability good practice around the Games, with evidence that this is already occurring within the events and construction industries (see headline finding 6);
- The innovation, skills and reputational benefits UK businesses have gained from delivering Games contracts;
- The wider benefits of the Games-inspired CompeteFor electronic brokerage system in influencing firms to compete for non-Games contracts and to develop new products and processes;
- Changes in working practices by London businesses brought about by the Games such as more flexible working arrangements; and
- The benefits to the London economy of Games-related transport improvements.

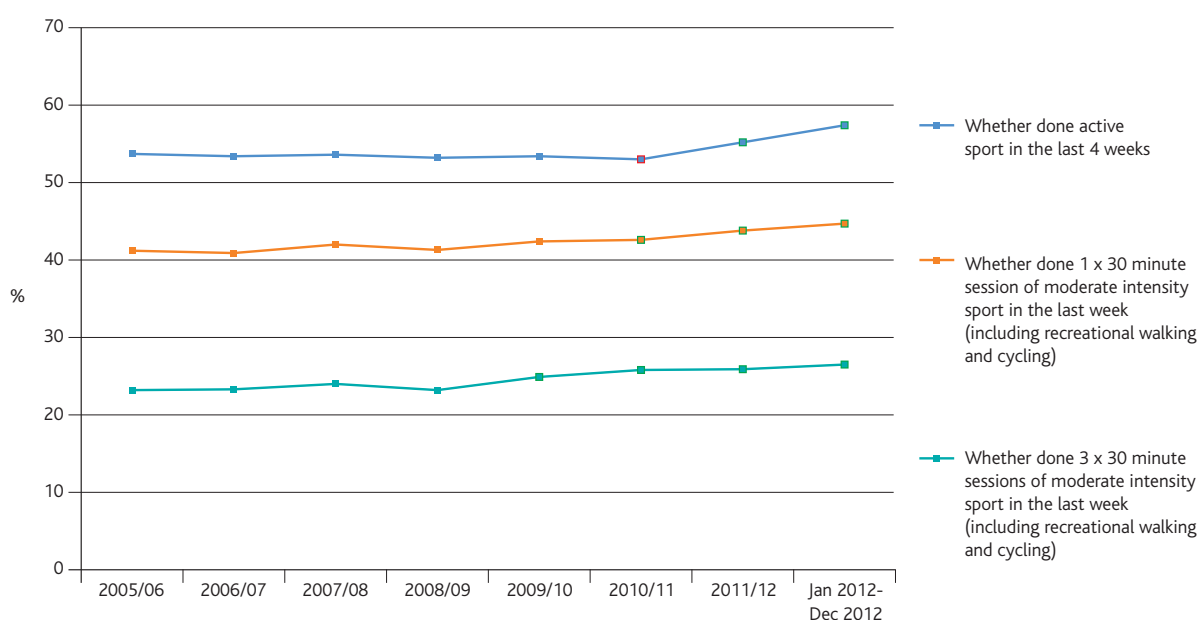
## 2 More of us are participating in sport because of the Games

The Games have been a key contributor to a significant change in adult participation<sup>3</sup> in sport and physical activity since 2005/06.

Both the Taking Part survey and the Active People survey show that after a period of remaining stable there have been increases in headline participation measures in the run up to the Games:

- Taking Part data indicates that the proportion of adults participating in at least one 30 minute session of moderate intensity sport (including recreational walking and cycling) in the last week has increased by 3.5 percentage points in 2012 since 2005/6, equivalent to 1.5 million more participants (see Figure 2-1); and
- Active People recorded an increase in the proportion of adults doing 1x30 minute session of moderate intensity sport<sup>4</sup> of 1.8 percentage points from October 2005-October 2006 to October 2011-October 2012.

**Figure 2-1: Frequency of adult participation in sport in England, 2005/06-2012**



Source: Taking Part

Note: Green data point outlines indicate a statistically significant increase from 2005/06, red data point outlines indicate a statistically significant decrease from 2005/06.

Active sport excludes recreational walking and cycling, which are included in the 'intensity' measures. Moderate intensity sport only includes sports of sufficient intensity to raise a person's heartbeat and breathing rate (e.g. yoga and archery are only included for over 65s and activities such as darts and snooker are excluded).

<sup>3</sup> Participation of children and young people is discussed in headline finding 3.

<sup>4</sup> This excludes recreational walking and cycling and is thus lower than the Taking Part measure.



These increases in participation levels are apparent across all demographic groups with the largest differences (in the Taking Part results between 2005/6 and 2012) noted for:

- Black and minority ethnic groups (5.0 percentage point increase);
- Those with a long standing illness or disability (4.2 percentage point increase);
- Lower socio-economic groups (4.2 percentage point increase); and
- Those not working (4.1 percentage point increase).

Sports participation is impacted by a range of factors: external factors such as the economy and the weather; internal factors such as health issues, available time, ability to afford opportunities; and sport system factors such as access to facilities, provision of opportunities and coaching. However, despite the recession and generally poor weather over the last few years, there has been a significant increase in sports participation in the run up to the Games. The Games contributed to these changes in participation in three broad and complementary ways.

The first was through the provision of hundreds of thousands of participation opportunities through programmes that would not have existed in their current form or with the same level of investment in the absence of the Games. These include:

- **Sport England's investment in National Governing Body (NGB) Whole Sport Plans** – Sport England invested in all of the Olympic and Paralympic sports between 2009 and 2013 to provide participation opportunities and infrastructure to capture and build on the interest generated by the Games;
- **Gold Challenge** – Part of Sport England's Places People Play, Gold Challenge provided participation opportunities to 105,000 people in multiple Olympic and Paralympic sports throughout England;
- **Inspire** – Participants in the Inspire programme's sports projects and events showed a 10 percentage point increase in the proportion participating in sport several times a week after Inspire; and
- **Change4Life** – Part of the Change4Life campaign, users registered with Walk4Life more than 90 days reported an average increase of 0.73 days a week of moderate physical activity for more than 30 minutes.

The second is through the investment in infrastructure and sporting facilities that happened as a direct result of the Games. Sport England has invested in almost 1,500 facilities through the three facilities strands of the Places People Play programme. The Sport Makers and Club Leaders strands of Places People Play further supported the sport infrastructure by investing in sport volunteering and helping clubs to become more sustainable. Pre-Games Training Camps (PGTCs) also improved facilities, with 20% of respondents to a PGTC survey reporting an increase in the facilities available to usual users after hosting the camps. Furthermore, three quarters perceived that PGTCs had a positive impact on participation. This investment and the positive impact on participation are also set to continue as the Olympic venues reopen (providing 1.45 million participation visits a year) and the participation benefits of investment in infrastructure via Sport England's Places People Play are realised (with awards made by the end of 2012 estimated to produce a throughput in excess of 25 million visits a year, which will rise as further funding awards are made in future funding rounds).

Figure 2-2 provides an indication of the legacy investment in participation taking place between 2008 and 2012, some of which is on-going.

**Figure 2-2: Timeline of participation programmes and investment**

Source: Sport England, London 2012 website, Department for Culture, Media & Sport, Sainsburys, Department of Health, Legacy Trust UK website

The third way the Games contributed to changes in participation levels is through the role they played in motivating people to participate, as evidenced by the Taking Part survey. Data for the 2012 calendar year showed that 15.3% of adults were either motivated to do more sport or more interested in sport because of the UK hosting the Games, namely:

- 12.0% of adults said that they have been motivated to do more sport by the UK winning the bid to host the Games (asked to those participating in sport); and
- 3.3% of adults said that they had become more interested in sport by the UK winning the bid to host the Games (asked to those not participating in sport).

Further analysis exploring the extent to which the Games could be responsible for increases in participation showed strong evidence that Games motivation led to participation, as expected. However, there was also some evidence of a reinforcing effect where participation would in turn lead to greater motivation. Given the significant increase in motivation around the Games, this further points to the Games having positively impacted upon participation in sport and physical activity in a substantial way.

The participation benefits of the Games have also been felt further afield. The International Inspiration programme has already provided 11 million of the 12 million planned participation opportunities in 20 countries across the world. It has also targeted government and policy makers and delivery infrastructure to ensure a sustainable impact.

### 3 The Games inspired a generation of children and young people

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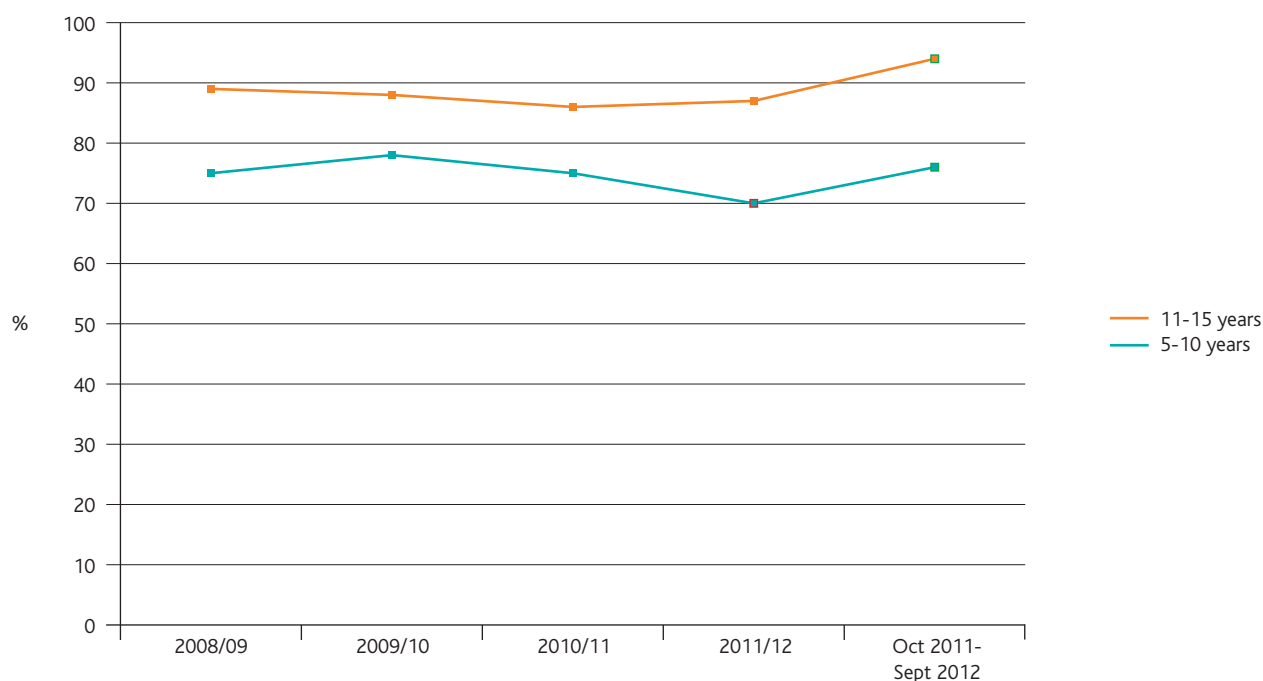
Children and young people expressed a higher level of engagement and enthusiasm than the general population across all aspects of the Games. This includes through sport, cultural and volunteering activities, as well as other Games-related projects which further brought to life the London 2012 Games slogan “inspire a generation”.

A primary focus of the Games was to increase the participation of young people in sport, which resulted in the Games providing access to sport participation programmes for thousands of young people across all age ranges. For example:

- **School Games** is providing significant opportunities to over 13,000 actively engaged schools, and in turn millions of pupils, to participate in competitive school sport;
- Over 153,000 children participated in **Change 4 Life Sports Clubs** by the end of the 2012 school year, with an increase of 40% in weekly sports participation by the end of 2010/11 compared to before joining a club;
- 140,555 young people were engaged (i.e. participating in a 6 to 8 week course) in **Sportivate**, with 83% retained (i.e. completing all but one session of the course) and evaluations over the first 18 months show 72% were sustained (i.e. taking part in sport 90 days later); and
- **Premier League 4 Sport** engaged 39,327 young people aged 11 to 16 in local sports clubs in eight Olympic sports, with 60% retained (i.e. participating at least 5 sessions in a term) and 30% sustained (i.e. participating at least 10 sessions across two terms).

The Games themselves also provided a significant motivator for young people to participate in sport. Over a third (36%) of children aged 5 to 10, along with half (52%) of those aged 11 to 15 and a quarter (25%) of those aged 16 to 24 who participate in sport indicated that the Games had motivated them to do more sport. This is a finding that is made all the more powerful when compared to the national average of 16% for the adult population.

For children, the effect of the opportunities and motivation provided by the Games can be seen on participation levels. According to the latest Taking Part data, sport participation in the last week rose for those aged 5 to 10 (to 76.0%) and 11 to 15 (to 94.4%) compared to 2011/12. For 11 to 15 year olds this is a peak and a significant increase since 2008/09, whilst for 5 to 10 year olds this reversed the previous decreasing trend to return to the 2008/09 level (see Figure 3-1). However, Taking Part shows that sports participation for young adults (16 to 24 year olds) has remained stable since 2005/06.

**Figure 3-1: Percentage of children who did sport in the last week, 2008/09 to Oct 2011-Sept 2012**

Source: Taking Part

Note: Green data point outlines indicate a statistically significant increase from 2008/09, red data point outlines indicate a statistically significant decrease from 2008/09.

Data for 5 to 10 year olds relates to out of school activities only. Data for 11 to 15 years olds relates to activities undertaken both in and out of school.

With on-going investment in School Games to 2015, a £150 million a year boost to primary schools sport and Sportivate running to 2017, sport participation opportunities are continuing to be provided and the expectation of a number of stakeholders is that participation levels should increase, or at least be sustained.

The influence of the Games was felt not only through school sport but more widely in the classroom too. The Get Set programme, which provided a range of tools and materials that could be used flexibly across a number of curriculum areas, had around 26,500 educational establishments registered. Teachers felt that this programme resulted in a number of positive outcomes, including boosting morale/ improving the atmosphere across the school and improving the teacher-pupil relationship, and the majority agreed that pupils had been inspired by the Games and associated values.

The Cultural Olympiad was particularly successful in engaging with young people and it is estimated that 40% of projects explicitly targeted children or young people. Some of these were led by young people themselves, such as the Tate Movie Project which involved thousands of 5 to 13 year-olds contributing to an animated movie or Stories of the World where 1,500 young people became curators, exploring how museum pieces resonated with their interests. 10% of young people aged 16 to 24 said that they were motivated to do more cultural activities because of the Games in 2012, compared to 6.5% for the adult population. Young people were also heavily involved in volunteering related to the Games, with 23% of Games Makers aged 16 to 24, more than any other age group.

As well as the large scale mass participation programmes, there were more targeted initiatives which used the Games to engage with the disadvantaged and hard to reach. The Prince's Trust programme Opportunity Inspired by 2012 provided support to 693 participants, helping disadvantaged young people to improve their employability and leadership skills. Meanwhile, the Young Leaders programme targeted similar groups, involving 100 individuals and recording positive outcomes for four in five participants in terms of moving into work, training, volunteering or education.

Overall, research with young people undertaken on behalf of Legacy Trust UK showed a great deal of positive feeling about the Games and their effects, with 84% of survey respondents believing that the Games had made a positive difference to the UK and 61% agreeing that it had transformed the lives of young people, inspiring them to aim higher, work harder and get more involved in sports and other activities.

The findings of the Legacy Trust were mirrored at the local level, with a focus group with young East Londoners finding that they perceived a range of benefits resulting from the Games. In particular, the young people spoke very positively about the valuable skills and experience gained from working in Games-time roles, something that was felt to have not only left them with great memories and experiences but a sense of achievement and potential, as well as valuable work experience that would give them the edge in future interviews. There was also a greater sense of pride in the area, with local young people now aspiring to live, study and work there.

## 4 The Games were the catalyst for improved elite sporting performance in the UK

With enhancements to the elite sporting system in the UK accelerated, and additional funding, the 2012 Games saw high levels of performance by Team GB and Paralympics GB. The level of success is best illustrated by the fact that multiple medal targets were either met or exceeded.

UK Sport set medal targets of between 40 and 70 medals for the 2012 Olympic Games and 95 to 145 for the Paralympic Games. Performance at both considerably exceeded the minimum target – 65 medals were won in the Olympic events and 120 in the Paralympic events, with 20 of the 28 Olympic sports achieving or exceeding their individual targets. Team GB exceeded the target of finishing fourth place in the medal table by coming third. Paralympics GB also finished third, one place below the targeted second, though the significant movement within the top 10 countries (with the rise of China since 2000 and notably Russia and Ukraine more recently) meant that maintaining a top three place in the Paralympic medal table was considered a successful outcome (see Figure 4-1).

**Figure 4-1: Total Olympic and Paralympic medals top 10 (2000-2012)**

Olympics						Paralympics					
Country	Pre Baseline		Post Baseline		Post v Pre*	Country	Pre Baseline		Post Baseline		Post v Pre*
	2000	2004	2008	2012			2000	2004	2008	2012	
China	59	63	100	87	33	China	73	141	211	231	114
<b>Great Britain</b>	<b>28</b>	<b>30</b>	<b>47</b>	<b>65</b>	<b>27</b>	Russia	35	41	63	102	45
USA	97	103	110	104	7	Ukraine	37	55	74	84	33
Japan	18	37	25	38	4	Brazil	22	33	47	43	18
France	38	33	41	34	2	USA	109	88	99	98	0
South Korea	28	30	31	28	1	<b>Great Britain</b>	<b>131</b>	<b>94</b>	<b>102</b>	<b>120</b>	<b>-2</b>
Ukraine	23	23	27	20	1	Czech Republic	43	31	27	11	-18
Italy	34	32	27	28	-6	Poland	53	54	30	36	-21
Cuba	29	27	24	14	-9	Japan	41	52	27	16	-25
Germany	57	48	41	44	-10	Germany	95	79	59	66	-25
Russia	88	92	73	82	-13	France	86	74	52	45	-32
Australia	58	49	46	35	-13	Australia	149	100	79	85	-43
						Canada	96	72	50	31	-44
						Spain	106	88	58	42	-47

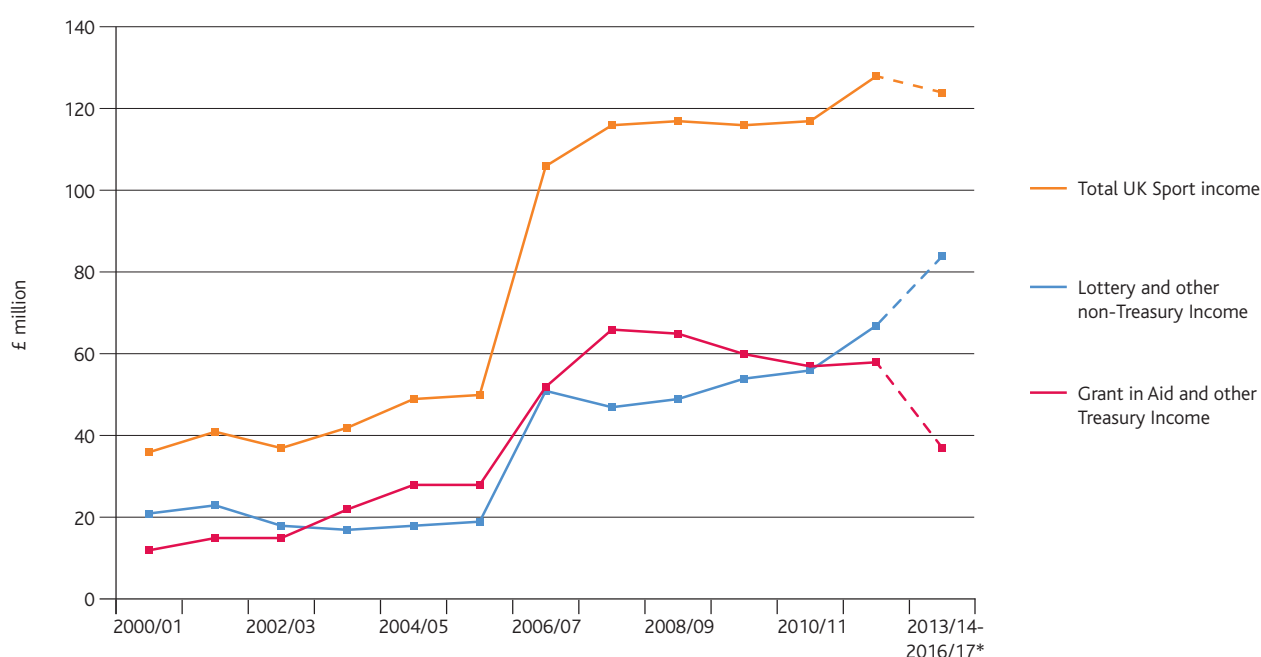
Source: IOC/IPC websites

Note: \* Average change between post and pre baseline:  $((2012+2008)-(2004+2000))/2$ .

Grey figures represent nations which were not in the top 10 in that specific Games.

Following poor performance at the Atlanta Games in 1996 where Team GB finished 36th in the medal table, elite sport in Britain was transformed with an increase in funding and policies and programmes to support improved elite performance. However, while the policy context may largely have been set prior to London winning the right to host the 2012 Games, the Games acted as a catalyst for achievement in elite sport. As a direct result of winning the bid to host the 2012 Games, additional exchequer funding of £200m in 2006 was allocated which allowed investment in a range of programmes and initiatives to support elite sport performance (see Figure 4-2).

**Figure 4-2: UK Sport funding**



Source: For income 2000/01-11/12 see UK Sport Annual Reports and Financial Statements.

For Prime Minister's announcement of projected funding levels for the Rio cycle (12 August 2012)

see <http://www.uk sport.gov.uk/news/Elite-athlete-funding-secured-to-ensure-the-gold-rush-continues-in-Rio-120812>.

Note: \* Projected

Given the tough economic context of the 2008/09 to 2012/13 period, it is reasonable to assume that had the UK not been hosting the Games, then sport would not have attracted as much additional funding as it did. However, funding alone does not contribute directly to enhanced performance. What is of much greater significance is how the funding is allocated. The following all contributed to the improved elite performance in 2012:

- **Talent identification and development** – This included investment in the Talented Athlete Scholarship Scheme (TASS) and UK Talent initiatives which identified over 100 athletes, 11 of which represented Great Britain at the 2012 Games;
- **Athletic and post-athletic career support** – Additional Performance Lifestyle Advisors were appointed who provide support to help athletes create the unique environment necessary for their success. Survey data suggests an overall positive impact of the 2012 Games on support for athlete career development with 72% of National Governing Bodies assessing the impact as strongly positive (17%) or positive (55%).

- **Elite coach and leadership development** – These initiatives aimed to enhance and develop coaches working within the British system, to enable them to become truly world leading coaches of the future. The Elite Coach Programme had 32 graduates between 2004 and 2012, the Elite Coach Apprenticeship scheme benefitted 12 coaches by 2012 and the Fast Track Practitioner Programme benefitted over 100 practitioners. The International Leadership Development Programme had 36 graduates in three years, 17 of whom hold posts of influence in international federations;
- **International competition** – During the period 2000 to 2003 an average of 9.3 events per year were supported, compared to 15.3 events per year over the 2004 to 2012 period, indicating that more events were hosted on average in the period since the UK announced its bid to host the Games. There was also more funding per event – £140,225 per event in 2000 to 2003, up to £195,067 – indicating additional support for events due to the Games; and
- **Scientific research** – Funding for scientific research grew significantly in 2006/7 to approximately £2 million, up from £750,000 per annum during the pre-2005 period. In addition, support raised both cash and value in kind. The UK Sport Research and Innovation programme made direct contributions to the enhancement of performance, especially in key medal winning sports.

While much of this activity was in place prior to the bid for the Games, all of these elements were enhanced in important ways in the years immediately prior to 2012 as a direct result of the extra financial resources provided.

Excellent performance at the 2012 Games coupled with a recognition that public sector investment is crucial to achieving such success have resulted in similar levels of funding committed to the end of the Rio cycle.<sup>5</sup> This is in support of the ambitious aspiration to improve on the London 2012 Games medal performance and points to a sustainable high performance system over the longer term.

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<sup>5</sup> Funding for the Rio cycle is allocated during 2013/14 to 2016/17 to cover the Games in 2016.



## 5 The Games supported the growth of the UK tourism industry

The net impact of the Games on the tourism industry in the UK during 2012 is estimated to be £890 million, or £598 million if spending on Olympic and Paralympic tickets is excluded, with a number of longer term benefits also expected.

In total, over £2.4 billion was spent by visitors attending Games-related events, including sporting events and cultural events.

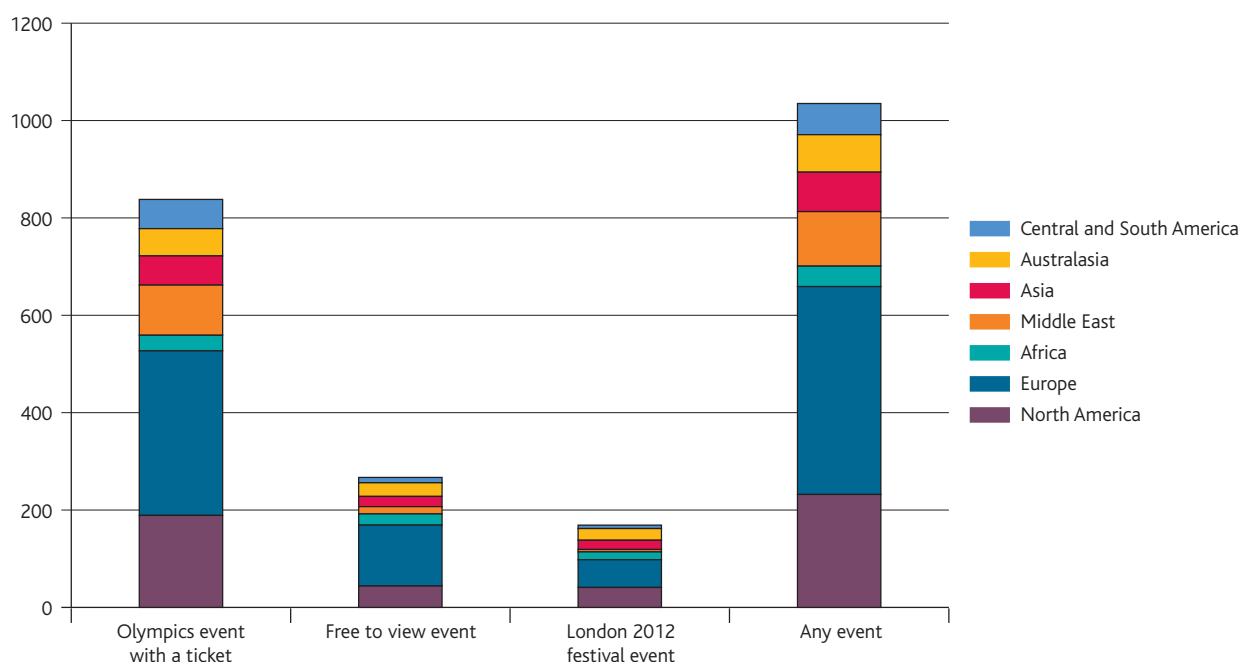
**Figure 5-1: Total net additional visitor expenditure due to the Games by type of visitor**

	Expenditure by visitors attending Games events (£m)		Expenditure that is additional, removing expenditure by visitors that would have come to the UK anyway (£m)		Net additional expenditure taking into account estimates of visitors staying away (£m)	
	Including ticket sales	Excluding ticket sales	Including ticket sales	Excluding ticket sales	Including ticket sales	Excluding ticket sales
Overseas visitors	1,090	975	674	604	305	235
UK overnight visitors	383	271	260	184	260	184
UK day visitors	974	542	325	179	325	179
<b>All visitors</b>	<b>2,447</b>	<b>1,788</b>	<b>1,259</b>	<b>967</b>	<b>890</b>	<b>598</b>

Source: London 2012 Tourism Impact Assessment: Impact of London 2012 on Visitor Numbers and Expenditure in 2012

According to the International Passenger Survey, in July, August and September 2012, over 800,000 overseas visitors either attended a Games-related event or said that their main reason for visiting the UK was related to the Games. These visitors are estimated to have spent nearly £1.1 billion in the UK during their stay. Most of these overseas visitors came from Europe and North America and the majority reported that the Games had a significant influence on their decision to visit the UK and that they would not have visited the UK otherwise.

**Figure 5-2: Overseas visitor expenditure (million pounds) by type of event and country of origin, 2012 Q3**



Source: International Passenger Survey

Despite this influx of Games visitors, overall international visitor numbers to the UK were actually down in Q3 2012 when compared to the previous year. This suggests that there was substantial displacement of regular visitors who were deterred by the potential for overcrowding, disruption and price rises because of the Games. However, the average spend of Games visitors was around double that of a normal visitor and as a result there was a substantial net increase in overseas visitor spend of £235 million (excluding ticket sales).

The Games also had a substantial impact on the domestic tourism market. Estimates from LOCOG suggest that 80 to 85% of the 11 million tickets sold for Olympic and Paralympic events were purchased by UK residents. A visitor survey which was completed for the meta-evaluation found that, for ticketed events, about a fifth of domestic visitors attended events as part of an overnight stay spending on average £125 per ticket purchased, while people coming to the Games on a day visit also spent a significant amount in the visitor economy (£86 on average per ticket purchased). Estimates from the Great Britain Tourism Survey and the Great Britain Day Visits Survey suggest that a further 6.4 million UK residents travelled to non-ticketed London 2012 events, including the Olympic Torch Relay<sup>6</sup>. It is estimated that the additional contribution to the visitor economy (excluding ticket sales) was £184 million from domestic overnight visitors and £179 million from domestic day visitors.

The 2012 Games also provided an opportunity to secure longer-term promotional impacts and increases in visitor numbers through using the increased media coverage of the UK during the Games to showcase London and the UK as tourism destinations. A number of research studies completed before the Games predicted that the majority of tourism benefits would come in the post-Games period, including Oxford Economics estimate of a net tourism gain to the UK of £1.24 billion over the period 2007 to 2017, with 79% of this impact accruing from 2013 onwards.

<sup>6</sup> Note that an estimated 15 million people saw the Torch Relays; however, many people would have seen it in their local area and therefore did not travel and would not be considered a domestic tourist.

Although it will take time before we know whether these long term gains are realised there is already positive evidence of the impact of the Games on perceptions of the UK abroad. Britain has moved up one place since the Games to be ranked fourth out of 50 major countries around the world in the Nations Brand Index, which is a measure of the international image of countries. As nation brands are very stable and no dramatic changes were expected, even a small change can be regarded as a positive effect. Britain was ranked higher for its cultural offering (which includes sport) than it had been pre-Games, but there were also improvements for welcome and natural scenic beauty indicating that Games coverage had influenced perceptions of Britain and the British people more widely.

Supplementary research found that people who had seen coverage of Britain hosting the Games were more positive about Britain across all of these categories and 63% agreed that it had increased their interest in visiting for a holiday (a figure which was notably higher for people living in emerging markets such as Brazil, Russia, India and China).

In light of this, the Games have driven a new growth strategy for inbound tourism to Britain from 2012 to 2020. A key aim of the strategy is to deliver a London 2012 economic legacy through tourism, building on the positive perceptions that the Games have generated. The strategy's ambition is to attract 40 million overseas visitors (compared to 31 million in 2011) and to earn £31.5 billion from international tourism a year by 2020.

Marketing campaigns associated with the Games have already generated significant numbers of additional visitors and there is potential for campaigns to build on the positive change in perceptions. For example, the on-going GREAT marketing campaign, which has a strong association with the Games, is already driving increases in intention to visit the UK and there are early indications that bookings have already increased as a direct result of the campaign.

## 6 The Games set new standards for sustainability

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London helped to establish new benchmarks for sustainability, not only in terms of the preparation and staging of mega-events, but also for the wider construction and events industries.

The Commission for a Sustainable London 2012 (CSL), which provided independent assurance on sustainability for the Games, heralded London 2012 as the “most sustainable games ever”. CSL concluded that:

*“On balance we believe there is sufficient evidence to conclude that sustainable practices inspired by London 2012 should out-weigh the inevitable negative impacts of the Games over time.”<sup>7</sup>*

Central to London 2012’s achievements on sustainability was the integration of sustainability into the planning, design and governance of the Games. When London bid to host the Games it promised to have independent monitoring of the sustainability of its activities and CSL was set up in January 2007 to fulfil this promise. This was the first time such a commission had been established to provide an assurance function on sustainability for an Olympic and Paralympic Games. It is widely acknowledged by a number of stakeholders that the independent and objective input from CSL at various stages added significant value to the sustainability of the London 2012 programme.

The London 2012 Sustainability Plan was central to the vision for 2012 and the vast majority of the Plan’s commitments to sustainable design and construction were met. Notable achievements include:

- At least 90% of demolition waste reused or recycled;
- All permanent venues and non-residential buildings designed to reduce water consumption by 40% in operational modes;
- Nearly 80,000 tonnes of carbon emissions avoided by producing concrete on site using recycled content and with the raw materials being supplied to the site by rail. This is equivalent to a 42% reduction against the UK industry average for concrete;
- The Olympic Village achieving 25% more energy efficiency than current building regulations; and
- The Olympic Park project using 100% sustainably sourced timber, with timber certified by either the Forest Stewardship Council (FSC) or the Programme for the Endorsement of Forest Certification (PEFC).

Of the venues on the Olympic Park, the Velodrome is regarded as the most innovative building in terms of sustainability. It is widely recognised that the design approach, particularly the cable net roof and extensive use of sustainable timber, has significant potential to inspire more sustainable solutions in comparable projects.

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<sup>7</sup> Commission for a Sustainable London (2013) *Making a Difference: Post-Games Report*.

Given its high profile, the work on the Olympic Park provides significant potential for learning on sustainability and the available evidence reveals just that. There are a range of examples of large-scale infrastructure projects and strategic infrastructure authorities taking on board the key features of the ODA's strategy and procurement approach on sustainability. These include Crossrail, High Speed 2 and key transport agencies, such as Network Rail and the Highways Agency. The Olympic Park project also helped to inspire a step change in performance in diverting waste from landfill. For example, most Transport for London (TfL) projects, Crossrail and other large-scale building projects now regularly specify 90 to 95% diversion from landfill.

Given that almost all of the sustainability commitments in the staging of the Games were achieved or exceeded, it is widely acknowledged that LOCOG's approach to sustainable events management helped to establish new best practice standards for the events industry. Notable achievements include:

- Zero waste from the 77-day Games period going to landfill;
- 62% of waste being reused, recycled or composted, which was near to LOCOG's ambitious target of 70%; and
- 100% of LOCOG logistics managed goods delivered to Games venues by more sustainable modes (for example by water or night time deliveries).

The events industry is already taking on board the good practice lessons from the Games. A range of case studies on the use of the Resource Management Plan (RMP) tool for waste management developed for London 2012 demonstrates wide take-up of learning across the events industry. For example, the RMP has been adopted by the Farnborough Air Show and a range of sporting events. There was also a consensus amongst stakeholders and case study evidence to suggest that the Games has helped to deliver a cultural change within the events industry around waste segregation and the use of multiple bins to collect different materials.

LOCOG's Sustainability Management System (SMS) is widely regarded as a key innovative aspect of the organisation's approach to sustainability. LOCOG's system was independently certified to the new British Standard (BS 8901:2009) – specification for a sustainability management system for events – which was upgraded to an international standard (ISO 20121) in June 2012. There is clear evidence that the British Standards Institution's (BSI) standard was developed as a direct consequence of London winning the bid and that it has major potential to improve the sustainability approaches of businesses in the events industry. Although no specific data on take-up of the BS and ISO sustainable management standards is available, stakeholder views and case study evidence suggest that BS 8901/ ISO 20121 has been widely adopted by event venues and venue contractors.

The challenge and opportunity now is to secure the wider adoption of this good practice. As early as 2008, CSL recommended that a learning legacy be established to enable London 2012 to make a difference to the sustainability agenda. The ODA and LOCOG have both produced a comprehensive suite of learning legacy material that provides a detailed account of the key elements of sustainability good practice. The UK Green Building Council (UK-GBC) were chosen to support the ODA's Learning Legacy programme on the topic of construction sustainability and played a key role in the dissemination of good practice in this area. In addition, the Government and industry supported Green Construction Board has promoted case studies from the Games to illustrate the benefits of the approaches taken, including at Ecobuild in March 2013, as has the Government supported Green Infrastructure Partnership. The UK-GBC series to share learning and its industry reach has been positively received and was highlighted as one example of positive dissemination, though some stakeholders felt that more could be done to take the plans forward and ensure wider learning and information sharing. Looking forward, the Department for Environment, Food and Rural Affairs (Defra) is to publish a Sustainable Procurement Guide for Construction Projects based on the learning from the Games.

## 7 The Games improved attitudes to disability and provided new opportunities for disabled people to participate in society

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The 2012 Olympic and Paralympic Games were a unique opportunity for sharing positive messages about disabled people, which led to an up-swell in positive public attitudes and perceptions of disabled people.

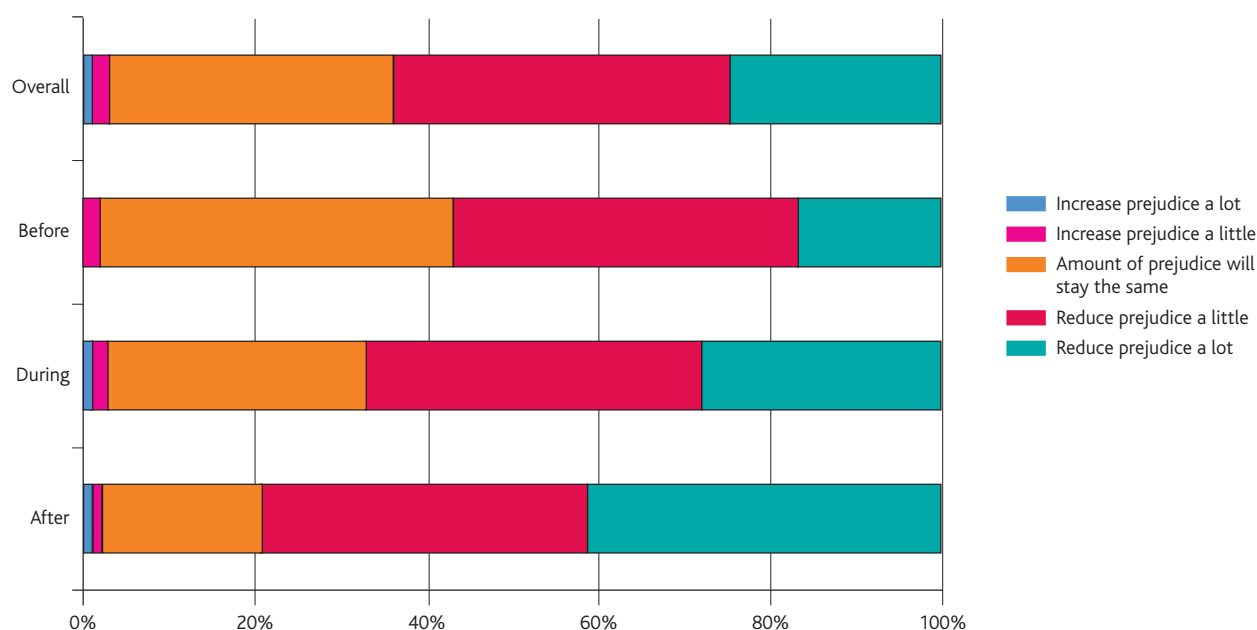
The clearest example of this opportunity for positive images about disabled people is the scale of coverage and support for the Paralympic Games. Channel 4 provided unprecedented levels of television and multi-media coverage of the Paralympics designed to challenge perceptions of disabled people. More than 500 hours of coverage were broadcast across all platforms, 350 hours over the stated target and four times more than from the Beijing Paralympics in 2008. It included 16 hours of live coverage every day and 1.3 million live streams online. The coverage reached an unprecedented share of the audience, and achieved record viewing figures. Almost 40 million people – more than two thirds of the UK population – viewed the Paralympic Games on TV.<sup>8</sup> Overall, 25% of all TV viewers watched Channel 4's coverage every day. Peak viewing levels reached 11.6 million for the opening ceremony – Channel 4's biggest audience in more than a decade – and 6.3 million watched Jonnie Peacock win Gold in the T44 100m, the largest rating for a single Paralympic event. Channel 4 also ensured that 50% of on-screen talent for Paralympic broadcasts were disabled people.

Other activities took place that complemented this work to improve public attitudes, including work in schools on disability sports through the Get Set programme, volunteering opportunities offered by the Games Maker scheme and the Unlimited programme of arts and cultural activities for disabled people as part of the Cultural Olympiad. Additionally, on London's Southbank a raft of accessibility improvements formed part of the Government's flagship public realm improvements.

Research to explore the impact of these activities has shown generally positive attitudes towards the Paralympics and its potential to reduce prejudice. Just under a quarter of respondents to the British Social Attitudes Survey felt that the Paralympic Games would reduce prejudice 'a lot', and almost 40% felt it would reduce prejudice 'a little'. This figure was significantly higher for those responding in the post-Games period, indicating that the success of the event itself reinforced this view (see Figure 7-1). However, despite this stated positive perception of the Games, overarching measures of attitudes towards disabled people have yet to show a notable improvement.

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<sup>8</sup> Channel 4 (2012) *The London 2012 Games. Brought to you by Channel 4*. Based on three minute reach of TV coverage over duration of the Paralympic Games.

**Figure 7-1: Paralympics reducing prejudice towards disabled people in Britain**

Source: British Social Attitudes Survey, NatCen Social Research (2012)

Other pieces of research also showed positive changes in attitudes after the Paralympics. Research by the disability charity Scope found that 62% of disabled people believed the Paralympics could improve attitudes towards disabled people. Independent media analysis showed a major improvement in the way disability was covered in the press in the year of the Paralympics, with a peak in the level of coverage of disabled people which used positive and empowering terminology.

How long the uplift in public attitudes will last is more questionable. Stakeholders broadly agreed that the improvement in attitudes was at risk of being a relatively short-term improvement and that developments and press coverage since the end of the Games, especially in early 2013 around the context of benefit reform, had affected public perceptions. Encouragingly, rolling survey evidence still being collected<sup>9</sup> shows that even by March 2013 a quarter of people were still saying that the Paralympic Games caused them to have a 'much more positive view' of disabled people. One stakeholder noted that:

*"For us what this shows is that the Paralympics were a breakthrough moment. But it takes longer than a fortnight to change attitudes. We should be asking what we can do to build on it and keep it going."*

The Games also opened up a range of volunteering, cultural and sporting opportunities for disabled people that did not exist before. Participation in volunteering by disabled people increased year-on-year to 2012, compared to 2005/06, and 4% of Games Maker volunteers had a disability. There was also an increase in engagement in arts and cultural activity by those with a disability in 2012, helping to narrow the gap with participation levels amongst non-disabled people. The level of involvement of disabled artists in the cultural programme was unprecedented and contributed to a greater credibility of the disability arts sector and the opportunity to showcase art to the mainstream arts sector.

<sup>9</sup> Games-related questions commissioned by Department for Work and Pensions were asked in five waves of the Office for National Statistics (ONS) Opinions and Lifestyle Survey from November 2012 to March 2013.

Participation in sport and recreational activity<sup>10</sup> by disabled people also increased by 4.2 percentage points in 2012 from 2005/06. This was in part driven by legacy programmes such as the Inclusive Sport Fund, which is investing over £10 million of National Lottery funding into projects designed to increase the number of disabled young people and adults regularly playing sport, along with opportunities offered by the School Games, Sportivate, Inspire projects and Legacy Trust UK. The School Games national event in May 2012 in the Olympic Park involved 167 disabled athletes (11.6% of the total) and all the facilities in the Olympic Park have been designed to be accessible to disabled participants and attendees.

Collectively, these developments – as a result of the Games – provided an opportunity for change that would not have been possible on an equivalent scale and would not have happened otherwise. Whether improvements in attitudes to disabled people are lasting will take longer to understand but the initial evidence is positive.

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<sup>10</sup> Based on 1 x 30 minutes of moderate intensity sport in the last week including recreational cycling and walking as measured by Taking Part.



## 8 Communities across the UK engaged with the Games

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London 2012 brought the Games to communities up and down the country to ensure that the benefits were shared beyond London, including efforts to increase access to opportunities for groups which are generally under-represented or face barriers to participation.

The Games created numerous opportunities for people to get involved across the country. This included watching the Olympic and Paralympic Torch Relays, attending or participating in events and activities organised as part of the Cultural Olympiad or by Inspire projects, and the huge number of volunteering opportunities including Games Maker, Team London Ambassadors and other host city programmes.

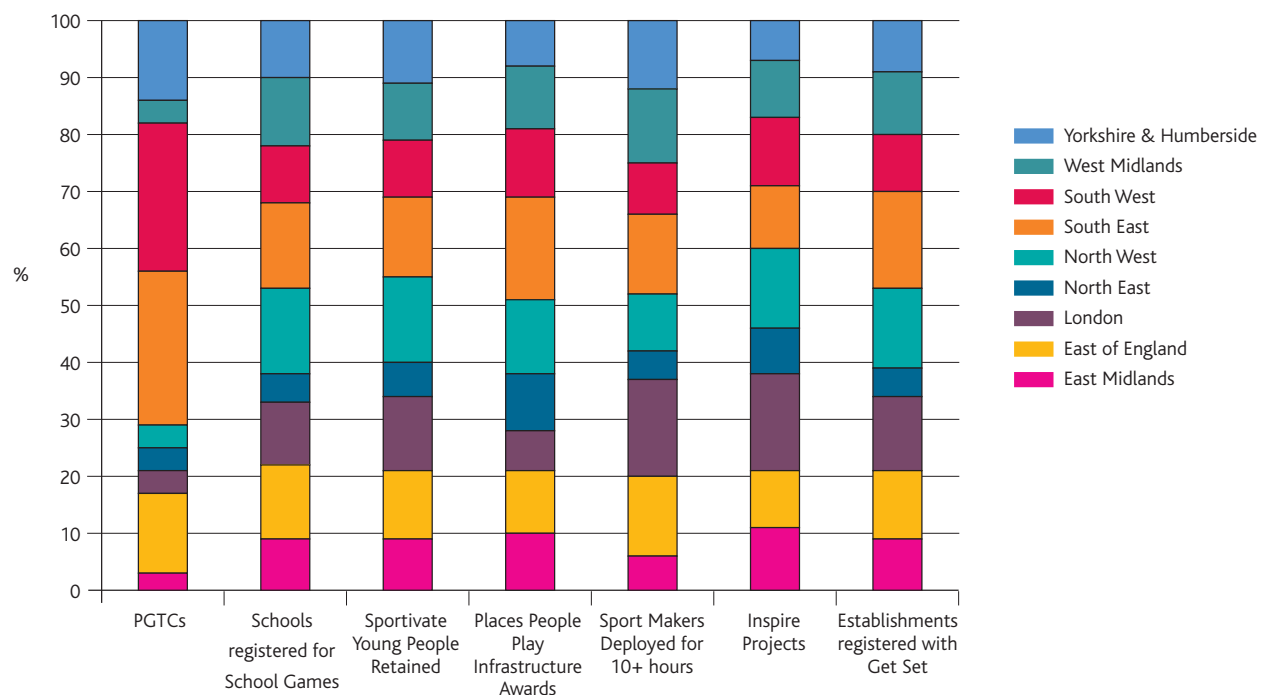
The scale of the resulting engagement is illustrated by the estimate that 15 million people came out to see the Olympic Flame as it travelled across the country, passing through over 1,000 towns and cities. The Olympic Torch Relay helped to bring communities together and also provided an opportunity for positive media coverage of local neighbourhoods and their links to the Games or achievements. Similarly, an estimated 223,000 people watched the Paralympic Torch Relay. The significant number of people involved in these events demonstrates how they acted as focal points to bring people together and illustrates the high level of interest, excitement and enthusiasm for the Games that existed amongst the general public even before the Games began.

The Cultural Olympiad also provided opportunities to enable and encourage large-scale participation by presenting an ambitious and accessible programme of events across a diverse range of art forms in all parts of the UK. The consensus is that the Cultural Olympiad clearly succeeded in this overarching aim, resulting in an extensive four year programme which involved over 117,000 events/ activities and created over 43 million public engagement experiences, the majority of which were free opportunities. Forty per cent of projects targeted children or young people and the programme of events for Unlimited was the largest ever in the UK for deaf and disabled artists.

In terms of sport not only were the Olympic and Paralympic events themselves staged from Weymouth to Glasgow, but a range of other activities and programmes were focused on increasing participation. The Pre-Games Training Camps took elite athletes to local facilities across the UK and initiatives such as Places People Play, School Games and Inspire provided participation opportunities in every part of the country.

The Inspire programme involved over 2,700 community projects across all of the nations and regions with a variety of themes in addition to sport (see Figure 8-1). LOCOG estimated that over 10 million people across the UK were involved in Inspire projects in some way. A survey of project leads prior to the Games revealed a high level of additionality for the programme with 39% saying their project wouldn't have taken place at all if it wasn't for the Games and 33% saying that it wouldn't have taken place with the same scale or profile.

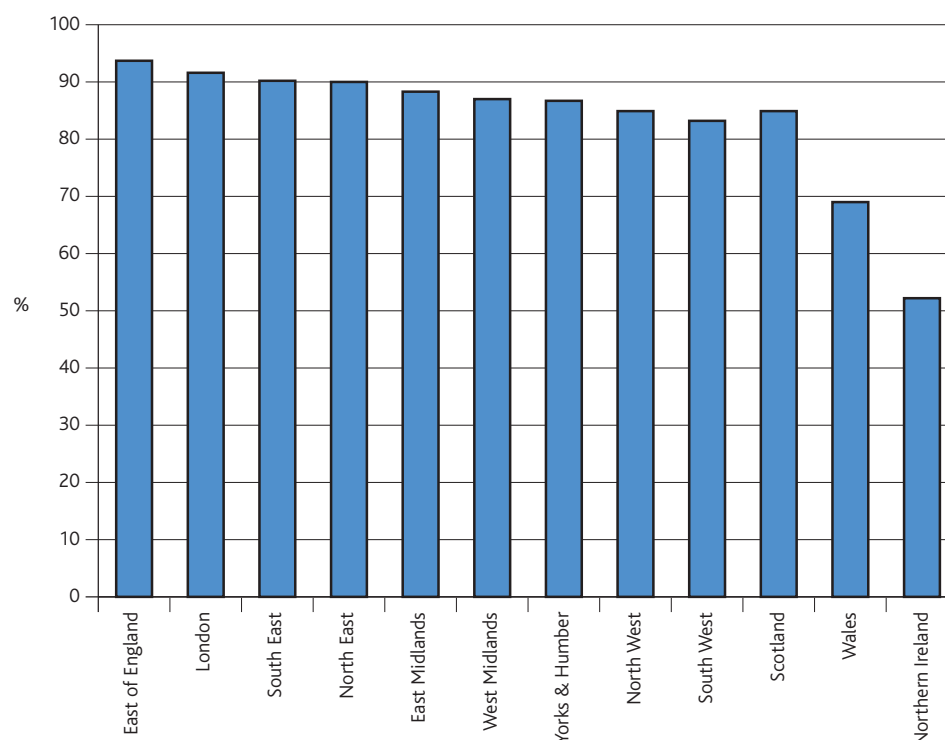
The evidence available shows that the Inspire projects also resulted in a number of significant positive impacts. These included the provision of new skills, increased involvement in local community activity and encouraging more people to volunteer. Indeed, 90% of participants reported at least one positive outcome, including meeting/making new friends, becoming involved in their local community and feeling more self-confident.

**Figure 8-1: Spread of selected Games programmes across the nations and regions**

Source: London Organising Committee of the Olympic and Paralympic Games, Sport England

The wide range of Games-related programmes and activities meant that everyone had an opportunity to engage with the Games and opportunities were taken up in different ways in different parts of the country. For example, analysis of Inspire projects in the North West of England showed an emphasis on sport which was also reflected in the share of Pre-Games Training Camps which were located in the region. The West Midlands engaged heavily in culture, resulting in an estimated 11,450 events and activities which attracted a total audience of 2.9 million and the Legacy Trust UK funded programme for the South East of England, Accentuate, placed a focus on changing attitudes towards disability.

There were also opportunities for different levels of engagement, ranging from organising events to actively participating in shows or other activities to taking the role of spectator. Get Set, which provided a range of resources to schools in order to use the Games to enhance the learning experience, offered two levels of engagement. Once registered, schools could access and use the resources as much or as little as required and Get Set achieved a high penetration of eligible schools registered, 85% on average but exceeding 90% in the East of England and London (see Figure 8-2). There was also an opportunity for schools and colleges to join the Get Set Network by demonstrating a higher level of commitment to the Olympic and Paralympic values in order to qualify for a range of rewards and this opportunity was taken up by 66% of establishments, illustrating that deeper levels of engagement were also widespread.

**Figure 8-2: Percentage of eligible establishments registered with Get Set**

Source: London Organising Committee of the Olympic and Paralympic Games

It is clear that the Games catalysed a significant level of activity across the UK, much of which would not have taken place (or taken place to the same scale) if London had not been chosen as the 2012 Games host city.

The success of Games-related activity in attracting large numbers of people at a local level underlines the extent to which London 2012 was able to successfully engage people across the UK in feeling part of the Games. People came together to celebrate the Games and their communities, taking part in a range of activities, including sports, arts and culture and bringing benefits for both individual participants and wider communities.

## 9 The Games have increased enthusiasm for volunteering

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London hosting the 2012 Games led to a significant increase in the supply of volunteering opportunities. 70,000 places were created by the Games Maker programme alone to directly support the delivery of the Games themselves and many thousands of other opportunities were available up and down the country to provide support in host cities (including the recruitment of 8,000 Team London Ambassadors) and to help run related activity (such as the Cultural Olympiad and Inspire projects).

Efforts to recruit volunteers were met with an enthusiastic response from the general public, with demand from applicants often far exceeding the supply of places. As an illustration of this demand the Games Maker programme received applications from 240,000 individuals, exceeding the number of places by more than three to one.

The Games inspired a full cross-section of the population to volunteer. Demographic data for the Games Maker programme shows a broad range of people (in terms of age, ethnicity and place of residence) were recruited to take part, although the programme was most popular with younger and older age groups (23% were aged 16 to 24 while 27% were 55 and over) – consistent with the pattern of volunteering in the general population and reflecting the increased leisure time generally available to students and retired people. Four per cent of the volunteer workforce were disabled people.

Volunteers across all programmes reported a high level of satisfaction with the experience and there were also opportunities to develop a variety of skills. In a survey of Games Makers, 31% highlighted gaining customer service skills, 29% teamwork skills and 27% communication skills, with similar findings from research with Team London Ambassadors. There was also recognition that they would be able to apply these skills in other volunteering, as well as paid employment.

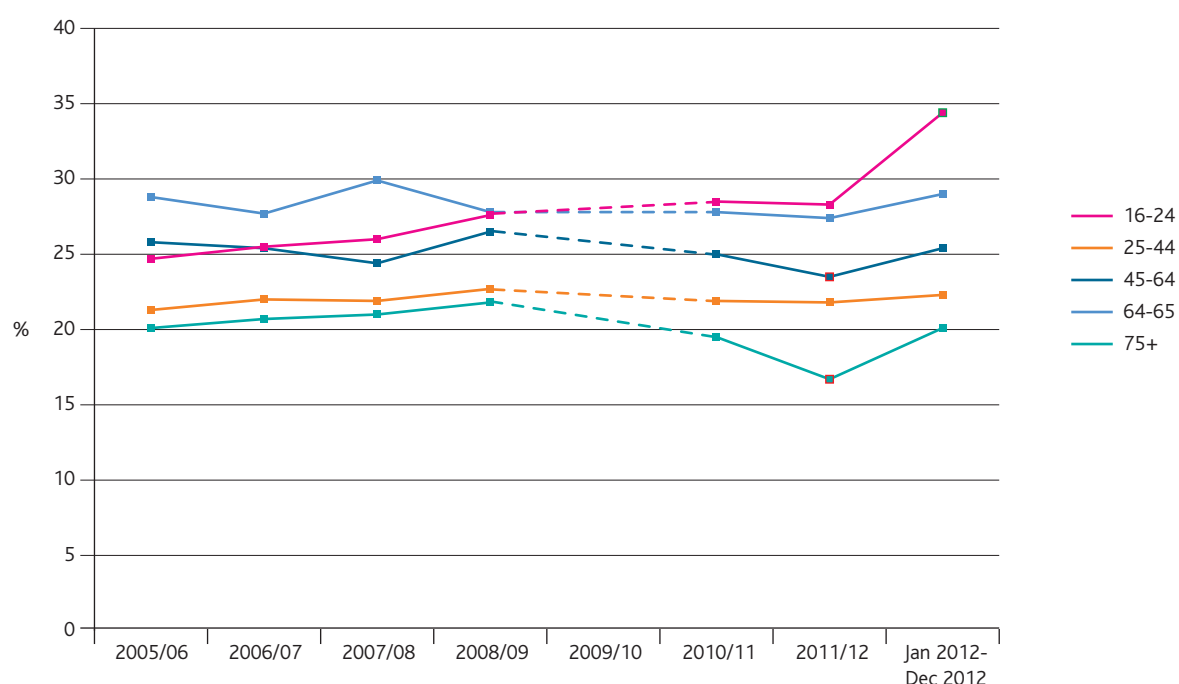
The role played by volunteers at the Games attracted high levels of media coverage and interest from the public. This positive response has helped to raise the profile of volunteering and increase recognition of the contribution volunteers make. Stakeholders feel that the profile given to volunteers during the Games has helped to change the image of what it means to be a volunteer in a positive way, including challenging traditional stereotypes of the type of people who volunteer and the roles they undertake. As importantly, stakeholders also noted that the experience of the Games has encouraged some organisations to think differently about the role volunteers can play and also inspired some companies to introduce or expand corporate volunteering schemes.

The Games has inspired many people to volunteer for the first time or to increase the amount they volunteer. A survey of Games Makers found that 20% of respondents had not volunteered before, with the chance to be part of the once in a lifetime opportunity afforded by the Games the primary motivating factor for people to get involved. Importantly, the experience of volunteering during the Games has motivated them to do more. 45% indicated they expected to increase their volunteering levels in the 12 months after the Games compared to that of the 12 months prior (however, it should be noted that the survey was undertaken in the immediate aftermath of the Games when enthusiasm was still likely to be extremely high).

87% of Team London Ambassadors reported that they were likely to volunteer again in the next 12 months. 84% also feel their experience had made them more likely to volunteer at other events, while 77% reported that they were more likely to volunteer for other activities.

There is also some suggestion that the Games has had a wider influence on the general population of volunteers. Data on the extent to which the Games motivated people to do more voluntary work showed a significant increase during the Olympic year, with 8.5% of those surveyed between January and December 2012 reporting that the Games had motivated them to do more. Analysis of the Taking Part survey shows a small increase in overall adult participation in volunteering during the year of the Games with a particularly notable increase for young adults aged 16-24 (see Figure 9-1).

**Figure 9-1: Percentage of the adults volunteering at least once in last 12 months by age group, England**



Source: Taking Part

Note: Green data point outlines indicate a statistically significant increase from 2005/06, red data point outlines indicate a statistically significant decrease from 2005/06.

While it is clear that the Games have created an increased interest in and awareness of opportunities for volunteering and community involvement more generally, going forward the challenge will be to maintain and build on this momentum to ensure that this enthusiasm is not lost. This will include implementing plans for further engagement of Games-time volunteers. It is an area where the Greater London Authority (GLA) has already made progress by providing opportunities for its Team London Ambassadors to support events which have taken place since the Games.

Given the high profile and unique nature of the Games, and its importance as a motivating factor for volunteers, stakeholders also note the potential challenge in encouraging Games-time volunteers to take-up volunteering roles in their local communities. In response to this, there is a real need to ensure that local organisations are supported to provide a continued supply of high quality opportunities. The Join In initiative has a role to play here by encouraging people to get involved in local groups through a programme of activity throughout summer 2013 which builds on the achievements of the initial Join In weekend in August 2012.

## 10 The Games accelerated the physical transformation of East London

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The creation of the Olympic Park and the wider development in its immediate surrounding area has resulted in unprecedented change in this part of East London.

Through a comprehensive programme of land acquisition, remediation and development, the Olympic Park was created on a largely derelict, polluted and inaccessible site, a site that was "*fragmented in terms of urban form and use*"<sup>11</sup>.

The transformation process began with the remediation and clean-up of 2.5 square kilometres of brownfield land, including the demolition of more than 200 buildings and the undergrounding of 52 power pylons. It continued through the development of six permanent sporting venues (along with a number of temporary venues), the building of the Athletes' Village, the creation of 80,000 square metres of business space through the International Broadcast Centre and Main Press Centre, the building of more than 30 bridges and connections across the Olympic Park and the creation of 100 hectares of green space.

Following the Games, and with the transfer of responsibility for the transformation of the Olympic Park from the ODA to the London Legacy Development Corporation (LLDC), work continues. The Park is in the process of being transformed from Games-time use to its legacy use as "*one of London's most dynamic urban districts*"<sup>12</sup>, hosting nearly 10,000 new homes, two primary schools, a secondary school, nine nurseries, three health centres, and a number of multi-purpose community, leisure and cultural spaces.

While plans for this part of East London – including a longer-term vision and proposals for its regeneration – developed prior to the awarding of the Games to London, the Games played a central role in driving forward the transformation of the Olympic Park site and its immediate surrounding area. For some aspects of the physical change, such as the creation of the permanent sporting venues, the transformation effect and benefits they will bring are wholly attributable to the Games. For others, the Games served as a significant catalyst to regeneration in East London – an acceleration that was, it should be noted, always the intention. In particular, the Games resulted in both:

- A "*more comprehensive and joined up site*"<sup>13</sup>, as it would have been unviable for the private sector to have brought forward a site of a similar scale which would have been subject to multiple ownerships; as well as
- A more integrated timetable for regeneration. The Games ensured that there was both a firm and immovable deadline for delivery, while also 'protecting' the public and private sector investment in regeneration activities in this part of East London from spending cuts that affected a number of other major regeneration projects across the UK.

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<sup>11</sup> Juliet Davis, London School of Economics Public Policy Group (2013) *2012 London Olympics: The impact of the Olympics: making or breaking communities in East London*. Publishing in British Politics and Policy Blog

<sup>12</sup> London Legacy Development Corporation (2013) *Three Year Business Plan 2013/14-2015/16*

<sup>13</sup> PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A Olympic Park & Lower Lea Legacy/Land Delivery (Final Report)*.



**Figure 10-1: Predominant land use on the Olympic Park – 2005 and 2013****Predominant land uses – Baseline (2005)**

- Brownfield
- Old Ford Nature Reserve
- Travellers site
- Rail
- Power lines
- Commercial (around 200, primarily industrial, businesses e.g. car breakers yards)
- Residential (small numbers, poor quality)
- Open space – scarred by shopping trolleys, car tyres, discarded white goods, with potential habitats suffocated by invasive plant species such as Japanese Knotweed and Floating Pennywort

**Predominant land uses – Post Games (2013 onwards)**

- Olympic Stadium
- Aquatics Centre
- ArcelorMittal Orbit
- Velo-park
- Copper Box (Multi-Use Arena)
- Tennis and Hockey Centre
- Energy Centre
- Commercial (91,000 sq m created through conversion of Press and Broadcast centre)
- Retail (Westfield Stratford City plus approximately 30,000 sq m of additional retail space)
- Residential (around 10,000 new homes)
- Open space (100 hectares)



Source: Olympic Delivery Authority (2007) and London Legacy Development Corporation (2013)

The catalytic role of the Games is also apparent in the transformation of public transport in East London. The Games resulted in a number of TfL's plans being brought forward significantly as a result of both the demand provided by the Games and the additional funding from the ODA which helped unlock planned investments. This included a project to double the capacity of Stratford Station, upgrades to the Dockland Light Railway and upgrades to the North London Line. The permanent nature of these enhancements mean that they form a vital part of the wider Games Legacy as they significantly improve transport capacity and reliability across East London, and will do so for many years to come.

This story of the Games acting as a catalyst and accelerator is repeated with regard to the wider transformation of the public realm across East London, as the host boroughs sought to maximise the impact of the Olympic Park development and better integrate the site into the sub-region. While much of the activity delivered was part of larger and longer-term development schemes, the presence of the Games brought forward and increased the scale of a significant proportion of the projects, including improvement to Hackney Wick and Fish Island, Greenwich Riverside and Town Centre and Stratford Town Centre. These improvements have made a positive contribution to the transformation of East London as a place beyond the Olympic Park.

In considering the wider physical regeneration effects of the Games, the evidence available to date suggests that they are limited to Stratford and the immediate vicinity of the Olympic Park. The most notable impact was the role that the Games played in bringing forward the Westfield development at Stratford City – and all the employment and economic benefits associated with it – by between five and seven years. For both the Westfield development and others where it has not been possible to quantify the nature of the role played by the Games, such as Lend Lease's in Stratford's International Quarter and Inter IKEA's in Stratford, it would appear that the impact of the Games is again catalytic. Not least in the context of driving investment in development in a time of economic downturn.

As a result of the Games it can be concluded that parts of East London – particularly the Olympic Park site and the area immediately surrounding it – already look, feel and function differently. These are changes that may have occurred in the absence of the Games, but they would have taken significantly longer and would have been far less integrated. However, while change is already apparent, the true physical transformation legacy and impact will not be fully realised for a number of years. The challenge will be to ensure that both the existing transformation plans are delivered while also ensuring that positive transformation effects ripple out more widely across East London.



# 11 Socio-economic change in East London has been shaped by the Games

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The Games have helped drive socio-economic change in East London through the provision of new economic opportunities and the creation of new community infrastructure.

The overriding conclusion is that the activities related to the 2012 Games have either directly (e.g. the construction of the Olympic Park) or indirectly (e.g. employment at Westfield Stratford City) created a significant amount of employment opportunities, a notable proportion of which have helped workless Londoners from the six host boroughs into employment. For example:

- The site clearance and build of the Olympic Park and Athletes' Village created in excess of 9,700 jobs for host borough residents;
- 1,951 host borough residents were employed by LOCOG as part of its Games-time workforce (55% of whom were previously unemployed) and 21,000 host borough residents were part of the Games-time contractor workforce in roles such as catering, retail and security; and
- Of the 10,000 permanent jobs created to operate Westfield Stratford City, around 3,000 went to unemployed Newham residents.

While it is of course true that some of these jobs were temporary and some would have been created anyway (research for the London Development Agency and Greater London Authority estimated that about one in every three jobs would not have been created in the absence of the 2012 Games), ensuring that local people were able to benefit from the employment opportunities arising out of the Games was an important objective for many stakeholders involved in securing the socio-economic legacy of the London 2012 Games. These stakeholders primarily saw the opportunity of the Games to act as a hook and inspiration to raise local people's aspirations by encouraging them to take advantage of both new and existing job opportunities. The 'inspirational effect' was also supported by a significant amount of activity, including job brokerage and employer engagement; the delivery of programmes and activities specifically focused on supporting workless individuals to prepare them for work and to find employment; and contractual requirements placed on development partners and contractors to ensure that a proportion of their workforce were local residents.

The provision of new economic opportunities has and will continue post-Games as the Olympic Park is expected to remain as a 'hub' of employment. The London Legacy Development Corporation (LLDC) expect to support 2,600 construction jobs through the transformation of the Olympic Park with in excess of 8,000 end-use jobs created through the businesses occupying the range of employment space (including iCITY – the converted press and broadcast centre) and the management and operation of the venues and facilities on the Park. Although it is too early to know for certain, these latter opportunities are likely to be particularly important in driving socio-economic changes as they will provide sustained opportunities at a range of different skill levels and across a range of sectors.

The second broad way in which the Games has helped to drive socio-economic change in East London is through the provision of new community infrastructure, including:

- New homes, a significant proportion of which will be affordable (35% of the homes the LDDC will develop and 48% of the converted Athlete's Village);
- New leisure facilities including the Olympic sports venues and the Olympic Park itself (which will offer 102 hectares of open space);
- New education facilities including two primary schools, one secondary school and nine nurseries. Alongside this, the University of East London and Birkbeck are opening a new campus in Stratford's cultural quarter in the autumn of 2013 and Loughborough University will open a campus in the converted broadcast centre (iCITY); and
- New health facilities including three health centres.

While these facilities are undoubtedly important community assets, the new communities that will inhabit and use them do need to be fully integrated into the existing East London community. This is a significant challenge that the LLDC, the host boroughs and a range of third sector and community organisations are actively seeking to manage and mitigate.

However, genuine socio-economic change in East London is a much longer term process. This was encapsulated in the idea of East London 'Convergence' – the overarching regeneration objective that:

*"Within 20 years, the communities which host the 2012 Olympic and Paralympic Games will enjoy the same social and economic chances as their neighbours across London"<sup>14</sup>.*

Based on the latest available data, good progress is being made on Convergence. In terms of the 23 indicators used to assess performance towards this goal, 11 are currently on track in terms of closing the gap between East London and the rest of London. For a further five indicators, the gap with London is closing, although either not fast enough or not for the right reasons (e.g. London's own average is worsening rather than East London's improving). The Games are only one part of a much wider regeneration story in East London that is driving this change, but what is clear is that the Games provided the impetus necessary to ensure that the six host boroughs approached regeneration and the potential for long-term sustainable socio-economic change in a more cohesive and collective way.

**Figure 11-1: Progress by 2011/12 on convergence indicators**

'Gap' reduced – Convergence on track	'Gap' reduced slightly – Convergence not on track
<ul style="list-style-type: none"> <li>• 19 year olds achieving NVQ level 2 threshold</li> <li>• % of working age population with no qualifications</li> <li>• Proportion of children in working age families receiving key benefits</li> <li>• Pupils achieving at least Level 4 in English &amp; Maths at Key Stage 2</li> <li>• Pupils achieving 5 GCSE grades A*-C in maintained schools</li> <li>• 19 year olds achieving NVQ Level 3 threshold</li> <li>• Life expectancy – male</li> <li>• Life expectancy – female</li> <li>• % of children achieving a good level of development at age 5</li> <li>• Mortality rates from all circulatory diseases at ages under 75</li> <li>• Violent crime levels</li> </ul>	<ul style="list-style-type: none"> <li>• Employment rate – aged 16-64</li> <li>• Unemployment rate 16+</li> <li>• Working age population qualified to at least NVQ Level 4</li> <li>• No sport or activity (0 times 30 minutes per week)</li> <li>• Recommended adult activity (3 times 30 minutes per week)</li> </ul>

<sup>14</sup> Host Borough Unit (2009) *Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs*.

Gap' increased – Convergence not on track	New indicator – progress tracked from 2012/13
<ul style="list-style-type: none"> <li>• Median earning for full time workers living in the area</li> <li>• Obesity levels in school children in year 6</li> </ul>	• Improved street and environmental cleanliness
	• % of households defined as overcrowded
	• Overall satisfaction
	• Economic Growth – job density
	• Economic Growth – income

Source: Host Borough Unit

The on-going challenge in terms of the Convergence agenda is two-fold. Firstly it is to ensure that the socio-economic benefits from both the legacy of the Games and wider economic development and regeneration activity more generally continue to extend east, beyond Stratford and the immediate vicinity of the Olympic Park. The second is to ensure that genuine socio-economic change is apparent over the longer term and that Convergence is not simply achieved solely as a result of gentrification and resident mobility.

Alongside these socio-economic changes it is also apparent that perceptions of East London are changing. This is true within the media where analysis suggests that perceptions of East London are moving away from an image of welfare, poverty and economic problems and towards one that is more focused on regeneration and investment. It is also the case with local residents, as a host borough resident survey and resident focus groups undertaken as part of this evaluation suggest there are generally high levels of satisfaction with East London as a place to live and a real sense that the Games have given residents a greater sense of pride in their area.

## 12 The Games delivered many strategic benefits and lessons learnt

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The Games have helped to drive strategic change and enabled lessons to be learnt around maximising the benefits from mega events. This is particularly true for public sector organisations but there is also evidence of benefit for the private sector.

It is apparent that in addition to the different benefits related to a range of different activities and programmes delivered as a result of the Games, there have also been a number of wider strategic benefits for the organisations involved. These can broadly be split in to three types:

- **Coordination benefits** – The Games played an important role in coordinating activities and delivery across a range of organisations that would not normally work together. For some, this spirit of joint working and the coordination of activities has continued after the Games. The most prominent example of this is probably the desire of the host boroughs to continue working together under the guise of the “Growth Boroughs”. It is also evident through the role that the GREAT campaign played in encouraging VisitBritain to work more collaboratively with other Government departments and agencies, including the Foreign and Commonwealth Office (FCO), UK Trade and Industry (UKTI) and British Council, on wider tactical approaches. The range of organisations and agencies responsible for both the coordination of skills and employment initiatives and sport (from grass roots participation to elite talent development) also found new ways of working together as a result of the Games.
- **Communication benefits** – A number of stakeholders pointed to the fact that as a result of the Games there was now a large number of people from across Government, its related agencies, as well as the private and third sectors, who now know each other and have experience of working together. It was an experience that many felt was not to be under-valued in terms of future communication and one that stakeholders felt would continue to reap benefits over the longer term both as part of ‘business as usual’, as well as for future major projects. The challenge, however, is to recreate as far as possible the spirit of joint endeavour that existed for the Games, for activities and projects on a much smaller scale.
- **Enhanced delivery capacity** – The Games clearly helped organisations to develop new skills, approaches and strategies. This ranged from one government department noting that they had become “*more outcome focused*” and “*less frightened of complicated projects*”, a benefit of a strong programme and project management ethos that had been created as a result of the Games, to maintaining flexible working practices that were introduced during the Games in order to increase productivity. There are also a variety of approaches and toolkits developed in relation to the Games which are now being taken forward and used for ongoing ‘business as usual’ activity.

The Games have also enabled a number of lessons to be learned about how to maximise the benefits to the host country and city from the staging of mega-events. These include:

- **The importance of a clear legacy vision at the outset** – This early stage planning was seen as critical to ensuring that benefits were maximised as it enabled objectives to be agreed, and resources and responsibilities identified and allocated.
- **The importance of cross party political commitment to the Games** – A commitment to the Games that did not waver following a change of Mayor in 2008 and a change of Government in 2010.
- **A clear remit and accountability structures for the organisations and partnerships responsible for delivering the Games** – Organisations were clear on what they were responsible for delivering and implementing. This meant that groups of organisations responsible for similar priorities and objectives were able to come together and to develop their own processes, structures and protocols for working together.

- **The engagement and participation of key stakeholders from the outset** – This included organisations from across the public, private and third sectors as well as across national, regional and local structures.
- **The provision of adequate funding to support the objectives** – This included both ensuring that funding is targeted and directed towards the key objectives from the outset, as well as investing in high quality project management and delivery processes.
- **The need to remain flexible and to be able to change plans** – The most striking example of the need for flexibility was in the delivery model for the Games themselves and the need for that model to adapt to the wider economic context.
- **The challenge of sustaining momentum and focus once the event is finished** – The absence of both the inspirational effect and the clear deadline of the Games does make partnership working more challenging as organisations and individuals naturally return to business as usual and their own organisations' specific priorities.
- **The value of sub-national structures** – There was clearly a shared understanding of a common agenda between national, regional and local agencies. It was a shared understanding that was supported through a range of different sub-national structures from the Mayor of London to the nations and regions groups to other more localised structures.



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