



department for
culture, media
and sport

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

Summary of Report 4: 'Interim Evaluation'

improving
the quality
of life for all

DCMS aims to improve the quality of life for all through cultural and sporting activities, support the pursuit of excellence, and champion the tourism, creative and leisure industries.

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Contents

	page
Section 1: Summary	4
Section 2: Introduction	5
Section 3: Methodological overview	7
Section 4: Harnessing the UK's passion for sport	10
Section 5: Exploiting opportunities for economic growth	17
Section 6: Promoting community engagement and participation	23
Section 7: Driving the regeneration of East London	28
Section 8: Cross-cutting themes	34
Section 9: Next steps	40

Section 1: Summary

The 2012 Olympic and Paralympic Games (2012 Games) over the Summer of 2012 are considered a national success in terms of organisation, medal haul, national engagement and as a summer of celebration. So soon after such a complex and long-planned event it is too early to make definite conclusions on the Olympic legacy but a number of major impacts have been identified to date. These include:

- Significant investment to increase and improve sport participation and facilities has been made. By June 2012 Sportivate and Gold Challenge have each provided participation opportunities to 100,000 people and 850 facilities have received awards from the Iconic Facilities, Inspired Facilities and Protecting Playing Fields programme.
- The proportion of people taking part in sport regularly in England (at least one 30 minute session of moderate intensity sport in the last week) increased from 41.2% in 2005/06 to 43.8% in 2011/12.
- Team GB and Paralympics GB both finished in 3rd place in the medals table at London 2012 for the Olympic and Paralympic Games respectively, both exceeding their medal targets.
- The £6.5 billion of Olympic Delivery Authority spend on the construction of the venues and Olympic Park infrastructure is estimated to have resulted in a gross impact of £8.2 billion of GVA and approximately 177,000 job years of employment in the UK over the 2007 to Q1 2012 period. Net impact, taking into account potential displacement of other activity, is estimated at £7.3 billion of GVA and 160,000 job years of employment.
- The Games-related London employment and skills programme helped 34,500 people into employment by the end of 2010/11.
- Many new opportunities for volunteering were delivered, including up to 70,000 people recruited as Games Makers.
- Prior to the Games it was estimated that there had already been more than 16 million attendances at Cultural Olympiad events.
- Parts of East London now look, feel and function differently. The 2012 Games have created new sporting venues, catalysed significant transport and public realm improvements and leveraged wider private sector investment.
- Nearly 10,000 new homes will be built in East London as part of the Games legacy, over a third of which will be family housing and nearly 40% affordable housing.
- Over 5,000 host borough residents were employed in the building of the Olympic Park and 4,000 in the building of the Athletes' Village.
- East London appears to be 'closing the gap' with the rest of London in relation to key socio-economic indicators.

The interim evaluation is a first assessment of the emerging legacy from the 2012 Games, setting out what has already been achieved and delivered. The next phase of the meta-evaluation, to be published in Summer 2013, will involve evaluating and synthesising the evidence available from many different data sources and evaluations expected to be completed. This should provide a more complete picture of the outputs, outcomes, impacts and lessons learnt.

Section 2: Introduction

2.1 The 2012 Games

Between July and September 2012, the UK hosted the Olympic and Paralympic Games ('2012 Games' or 'the Games'). One of the key elements of London's bid for the Games was the commitment that they would result in a lasting legacy for the whole of the UK.

The vision for the 2012 Games was for them to be both a successful sporting event and also a catalyst for lasting change, before, during and after the event. The legacy plans for the Games focus on four areas – sport, the economy, community engagement and the regeneration of East London – as well as the cross-cutting themes of sustainability and disability.

In pursuit of the legacy objectives, a large number of policies and initiatives have been – and continue to be – developed and implemented by a diverse range of organisations across the public, private and third sectors.

2.2 The meta-evaluation

The purpose of the meta-evaluation is to assess the impact and legacy of the 2012 Games and the various legacy projects, setting out impacts across the nations and regions, the host boroughs¹ and on specific groups.

The meta-evaluation was commissioned by the Department for Culture, Media and Sport (DCMS) but will report on impacts of legacy activity being driven by a wide range of organisations, communities and individuals.

Reports 1 and 2 of the meta-evaluation, published in Summer 2011, set out the research questions, method and analytical framework to be used by the meta-evaluation. Report 3, published in January 2012, established the baseline and counterfactuals for the meta-evaluation to answer the question "*what would have been expected in the absence of the Games and/or legacy interventions?*"

2.3 The interim evaluation

This summary of Report 4 sets out the findings of the interim evaluation. The interim evaluation examines available evidence of the impacts and legacy that has emerged from activity taking place primarily in the pre-Games period. It draws on a wide range of available sources of evidence including monitoring and output data, evaluations and research undertaken by other organisations and individuals, and primary research commissioned or undertaken directly by the meta-evaluation team. Chapter 3 provides more detail on the evidence base, in particular how it was developed and how it has been used.

The interim evaluation focuses on the impact and legacy of pre-Games activity and does not, in the main, cover the impact and legacy of Games-time activity. The cut off point for the inclusion of data

¹ This includes the six London Boroughs of Barking & Dagenham, Greenwich, Hackney, Newham, Tower Hamlets and Waltham Forest.

was June 2012 (with a few exceptions) and therefore this report only provides a partial assessment of impacts and legacy of pre-Games activity – largely due to time-lags in available data. Report 5 will provide a more complete picture when published in Summer 2013.

The interim evaluation is therefore an initial assessment of the emerging legacy from the 2012 Games for each of the four legacy themes, providing insight into what has already been achieved and delivered. Where possible it also provides a sense of direction and scale in terms of what can be expected post-Games in both the medium and longer term.

Section 3: Methodological overview

The methodological approach taken in synthesising the evidence for Report 4 along with the process involved in gathering the evidence is summarised in this section. The overarching methodological approach taken to the meta-evaluation is set out in detail in Reports 1 and 2.

3.1 Overview of the approach

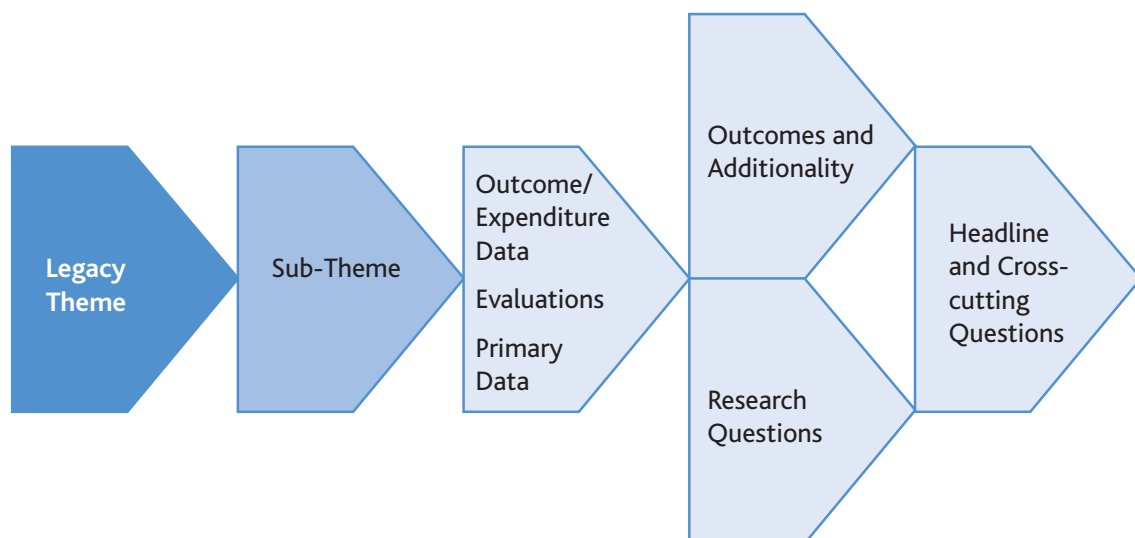
Figure 3-1 illustrates the methodological approach adopted for this interim evaluation and shows how we have sought to structure the findings. The analysis and reporting has been structured by the four legacy themes and then further broken down by the legacy sub-themes. This structure has guided all of the meta-evaluation work to date.

For each sub-theme we have sought to analyse the evidence available by 'type', with three broad types of evidence used:

- Output and expenditure data;
- Evaluation and other research evidence;
- Primary research.

In undertaking the analysis and synthesis we were mindful of the differences between the types of evidence and data. Our approach has enabled us to analyse parallel forms of evidence separately and helped to avoid any confusion that may have been created by attempting to synthesise incompatible types of evidence. The amount and type of evidence available differs within themes and sub-themes.

Figure 3-1: Illustration of the methodological approach adopted



With the evidence analysed separately by type, the next step was to triangulate the evidence to begin to draw some conclusions. This process was done in the following two ways:

- The first was to draw the different sources of evidence together and to comment on what the evidence was inferring around the outcomes for a particular sub-theme and the additionality of the Games in driving those outcomes.
- The second approach was to draw the different sources of evidence together to begin to provide answers to the various research questions (see Figure 3-2) established at the outset of the meta-evaluation.

Having followed this approach for each theme, the final stage was then to synthesise the findings across the themes and to draw some overall conclusions with regard to the pre-Games legacy of London 2012 through answering the cross-cutting research questions.

3.2 Gathering the evidence

The intention from the outset of this study was that it would draw primarily on evaluation evidence, although some resource was allocated to help fill gaps in the available evidence base. In practice, and as expected with a meta-evaluation of this scale, the approach to gathering the evidence has been complex, but can be broadly summarised as follows:

- Output and Expenditure Data: Given potential gaps in the evidence base, the decision was taken that it would be prudent to also collect output and expenditure data for key legacy projects and programmes as this, in the absence of evidence of outcomes and impacts, would at the very least provide insight into both the scale and nature of legacy activities.
- Evaluation and Research Evidence: This can broadly be broken down into two types of evidence:
 - *Evaluation Evidence*: Throughout the lifetime of the project, evaluations of 2012 legacy activities have been tracked, providing an understanding of what evidence is likely to be available and when;
 - *Primary Research*: In a further attempt to close gaps in the evidence base a range of primary research was undertaken according to priorities agreed with DCMS. This generally took three forms: research undertaken directly by the meta-evaluation team; DCMS commissioned survey work; or an organisation was encouraged to either undertake the work or to adapt their existing work to assist in filling the gap.

3.3 The research questions

For each legacy theme there are a number of theme-specific research questions which, as noted, have guided our analysis. These questions all sit below the headline research questions (see Figure 3-2) which are considered to be of most interest to Government, business and the public at large and which guide our strategic approach to the meta-evaluation.

The headline research questions that can be answered within the timeframe of this study are labelled as 'to 2013' whilst those which require a longer term perspective are labelled as 'post 2013'. The spatial scope of each question is defined in terms of the geographical levels of the host boroughs and the wider nations and regions of the UK.

Figure 3-2: Headline research questions

Question	Spatial Scope	Temporal Scope
Summary questions for each legacy theme		
1. What have been the impacts of the Games ² on sport and physical activity and in particular the development of mass participation, competitive school and elite sport?	Nations, regions and host boroughs	To 2013 and Post 2013
2. What have been the economic impacts of the Games, particularly in terms of employment and gross value added (GVA)?		
3. What have been the social impacts of the Games, particularly in terms of volunteering, the cultural sector and community engagement?		
4. What have been the impacts of the Games on East London, and in particular socio-economic and organisational change?	Host boroughs	To 2013
Cross-cutting questions		
5. How far have the beneficial impacts so far accrued to their intended target groups/communities (including across measures of equality, inclusion and diversity)?	As defined by legacy theme	To 2013
6. How far have the Games changed attitudes to disability, and increased the participation of disabled people in sport, the economy, volunteering and culture?	Nations, regions and host boroughs	To 2013
7. How far have the Games contributed to sustainable development, in particular through demonstration effects and the encouragement of behavioural change?		
8. In what ways have the 2012 Games and associated activity contributed to well-being?		
9. What have been the impacts of the staging of the Games on the international profile and reputation of the UK, London and East London?	Nations, regions, host boroughs and overseas	To 2013 and Post 2013
Study conclusions		
10 (a). How far have the investments in legacy initiatives represented value for money? (b). Up to 2020, how far has the overall investment in the Games represented value for money?	Nations, regions and host boroughs	(a) To 2013 (b) Post 2013
11. How far have the impacts of the Games been sustained in practice – and what, if any, further/consequential impacts have emerged (for example, on health)?		Post 2013
12. What lessons can be learned about how to maximise the benefits to the host country and city from the staging of mega-events, particularly in terms of organisational lessons and change?		To 2013

² The '2012 Games' is defined as the combination of preparing for and staging the Games and the package of legacy initiatives.

Section 4: Harnessing the UK's passion for sport

Headline research question: What have been the impacts of the Games on sport and physical activity, and in particular the development of mass participation, competitive school and elite sport?

Key findings:

- The proportion of people taking part in sport regularly in England (at least one 30 minute session of moderate intensity sport in the last week) increased from 41.2% in 2005/06 to 43.8% in 2011/12.
- Key outputs by June 2012 from Sports legacy programmes include:
 - Sportivate and Gold Challenge have each provided participation opportunities to 100,000 people.
 - Iconic Facilities, Inspired Facilities and Protecting Playing Fields have provided awards to almost 850 facilities.
 - School Games has over 13,600 schools registered and 31 competition formats at intra-school and inter-school level developed.
 - Change4Life Sports Clubs has reported over 61,000 young people participating with 90% of these choosing to play sport every week at the end of the first year.
 - Sport Makers has registered approximately 33,000 volunteers throughout England.
- There has been significant investment in facilities both for staging the Games themselves and for hosting Pre-Games Training Camps (PGTCs) around the country.
- Team GB and Paralympics GB both finished in 3rd place in the medals table at London 2012 for the Olympic and Paralympic Games respectively, both exceeding their medal targets.
- International Inspiration reached 12 million children by July 2011, with a range of participation and other opportunities provided to these children in 20 countries. Over 270 UK schools were linked to partner schools around the world.

The legacy plans in the sport theme centre on harnessing the UK's passion for sport and encouraging physical activity. Early evidence suggests that the Games have had a positive impact on sports participation and elite performance.

4.1 Participation

The key legacy promises in relation to participation are to increase grassroots participation, particularly amongst young people, and to encourage the whole population to be more physically active.³ The share of lottery funding into community sport has been increased to support achievement of these objectives, with specific legacy programmes and initiatives funded.

Key participation legacy programmes include Places People Play and the School Games. The £150 million Lottery-funded initiative Places People Play⁴ was launched in November 2010 and was designed to increase participation through a range of initiatives such as Sportivate, a programme to provide 14-25 year olds with coaching in a sport of their choice, and Gold Challenge, an initiative to motivate people to get involved in Olympic and Paralympic sports and raise money for charity, whilst the School Games aims to increase competition across four levels.⁵

Before being discontinued, the Physical Education and Sport Strategy for Young People (PESSYP), which was jointly led by DCMS and the Department for Education, contributed to participation, elite sport and (soft) infrastructure objectives. PESSYP began as a national initiative in 2002 but was subsequently harnessed to meet 2012 Games objectives with additional funding of £100 million over the 2008/9 to 2010/11 period.

Places People Play (through Sportivate) has provided participation opportunities to almost 100,000 young people and is on target to achieve the milestones set. The first year of the Sportivate evaluation (to March 2012) indicates that, by providing opportunities to nearly 100,000 young people, Sportivate is increasing participation levels among the young people it reaches. Sportivate is also:

- Helping to keep young people involved in sport: 81.7% of participants completed at least all but one session and 88.9% of those were still taking part in sport 90 days from the end of the Sportivate sessions;
- Reducing the number of young people who do no sport at all to 2.1% of Sportivate participants, down from 9.9%.

The School Games had over 13,600 schools registered by May 2012, exceeding the target of 12,000, and 31 competition formats at intra-school and inter-school level. These impacts are realised regionally, with schools from throughout England registered. Level 4 of School Games, a national multi-sport event aimed at the most talented young people, involves the nations as well.

Premier League 4 Sport, a £5.8 million partnership with the Premier League working with the Youth Sport Trust and Sport England, aims to get young people to join local sports clubs. The legacy initiative has provided participation opportunities to young people, with 43,000 young people engaged by Premier League 4 Sport, almost double its target. The programme has been extended in duration and to incorporate additional sports. In terms of outputs, 63% of young people that were engaged were then retained (at least 5 sessions per term), with 27% of young people sustained (at least 10 sessions over two terms).

Inspire, which enables non-commercial organisations across the UK to link their events and projects to the 2012 Games in an official scope, and Legacy Trust, a charity set up to use the 2012 Games as a catalyst to fund projects which enable communities across the UK to take part in cultural and sporting activities, have also provided opportunities for increased participation. Of the 2,713 Inspire projects, 43% (1,172) have been sport-related, with these projects taking place across the nations and regions of the UK.

³ Hansard, Written Ministerial Statement by The Secretary of State for Culture, Olympics, Media and Sport on Olympic and Paralympic Games Legacy, 20th December 2010.

⁴ Places People Play is being delivered by Sport England in partnership with the British Olympic Association and British Paralympic Association. It operates throughout all the regions of England and consists of eight strands covering participation and infrastructure.

⁵ School Games is a framework of competitions led by Sport England and delivered by the Youth Sport Trust, supported by Lottery funding, with additional funding from the Department of Health and Department for Education. All schools in England have been given an opportunity to participate, with pupils competing against one another in intra-school (level 1), inter-school (level 2) and county festivals (level 3). A national event, level 4, also includes students from the nations.

Other legacy programmes, such as Change4Life Sports Clubs⁶, Walk4Life⁷ and Games4Life⁸, have also facilitated participation in sport and physical activity, with interim evaluation evidence indicating that this participation is being sustained. Walk4Life reports that physical activity levels increased by 0.73 days a week of moderate physical activity for more than 30 minutes for users registered more than 90 days and Change4Life Sports Clubs reports over 61,000 young people participating with 90% of these choosing to play sport every week at the end of the first year (an increase of 40% when compared to data obtained when joining up).

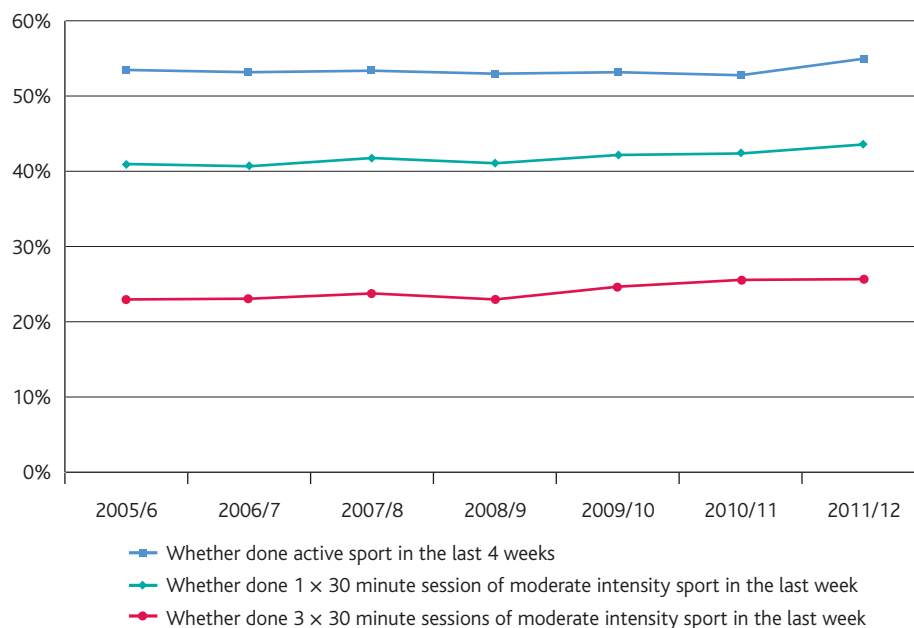
Building on PESSYP and other initiatives, and with School Games running until 2015, it seems likely on-going competitive opportunities for young people will be provided.

These initiatives may be impacting on general participation trends. According to the Taking Part survey⁹, adult participation levels have increased over the 2005/06 to 2011/12 period, particularly over the past year:

- The proportion of people taking part in sport regularly in England (at least one 30 minute session of moderate intensity sport in the last week) increased from 41.2% in 2005/06 to 43.8% in 2011/12;
- Active sport participation in the last 4 weeks increased from 53.0% in 2010/11 to 55.2% in 2011/12, compared to a static trend over the 2005/6 to 2010/11 period.

Taking Part also indicates that 7.3% of those participating in sport or recreational physical activity have been motivated by the Games to do more.

Figure 4-1: Adult sport and physical activity participation (in England)



Note: Active sport excludes recreational walking and cycling, which are included in the 'intensity' measures. There are also minor differences in the sports and recreational activities within the active sport and 'intensity' measures. Moderate intensity sport must be continuous and raise a person's heartbeat and breathing rate.

Source: Taking Part survey.

⁶ Change4Life Sports Clubs aims to harness the inspiration of the Olympic and Paralympic Games. It encourages less active primary and secondary aged school children to do more physical activity and engage in sport.

⁷ The Walk4Life project aims to encourage people who are inactive, or who do very little physical activity, to walk more to improve their health. The Department of Health gave £1.4 million of funding at the beginning of the project which was registered as an official 'Inspire' project with LOCOG.

⁸ The Games4Life (G4L) campaign aims to inspire residents across the UK to get active during this year's summer of sport. It encourages everyone to fill out a simple activity check questionnaire in return for a tailored G4L activity pack to keep both adults and kids busy during the summer months.

⁹ Taking Part is a major continuous survey of cultural and sport participation in England and has been undertaken every year since 2005/6. Taking Part is used throughout the report to provide a picture of participation at a national level. Where there is a need for local level data or more detailed analysis by individual sports the Active People Survey has been used.

Evaluations of Places People Play and School Games, when available, will provide further insight into the impact on participation. Monitoring of the longer term trends (through Taking Part for example) will indicate the extent to which increases in participation are being sustained and whether there is any 'Olympics boost' from Games-time itself.

4.2 Infrastructure

To support participation, investments in infrastructure which will transform the places where people play sport and enable sport at a local level have been made throughout the UK. Significant investments have been made in facilities as a result of the Games, as well as in a range of other programmes and initiatives aimed at improving facilities and increasing club membership. This includes 'soft' infrastructure, such as coaching and volunteering.

Investments in the new sporting venues in the Olympic Park will in legacy include a range of world class sporting facilities, with 3 to 4 million visits expected to the sporting venues in 2016.¹⁰ Community use of these facilities remains a core priority for the London Legacy Development Corporation (LLDC), however the venues will also cater to national and international elite athletes, with a series of international sporting events planned.

Investments in facilities throughout England have facilitated the creation and enhancement of sporting infrastructure outside of London. Around the UK, substantial investment in the form of upgrades to venues for PGTCs have been made. In addition, monitoring data on the investment in local facilities through the Places People Play initiatives Iconic Facilities, Inspired Facilities and Protecting Playing Fields indicates that almost 850 facilities have received funding awards, with these programmes on track to meet their targets. Central to these awards is the requirement that facilities support participation. Evaluations of Places People Play will reveal the extent to which this has occurred.

Investment to secure the softer infrastructure – volunteers, coaches and club membership – vital to creating a sustainable sporting system is on-going. Evidence to date indicates that:

- Sport Makers (part of Places People Play) registered approximately 33,000 volunteers throughout England, 18,000 of which have attended an event by June 2012;
- Premier League 4 Sport established 343 satellite clubs in 2010/11, with the Change 4 Life School Sports Clubs programme outperforming the counterfactual case as follows: almost 2,000 more school-clubs, around 2,900 more trained coaches and around 2,100 more clubs;
- PESSYP resulted in increased coaching and club membership opportunities, especially amongst young people;
- The Leadership and Volunteering and School Sport Coaching strands of PESSYP have supported young people with opportunities to develop skills in a range of areas, including volunteering and leadership, through volunteering at major events, officiating and helping to organise school competitions.

4.3 Elite Sport

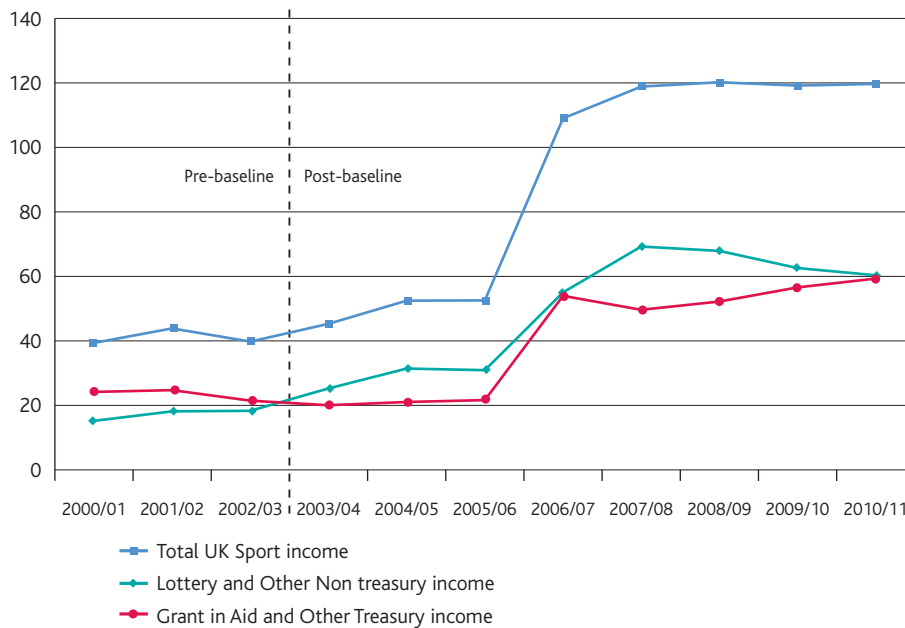
The aim of the elite sport legacy is to maintain and further develop a world class high performance system in the UK. The development of the elite sport system has been significantly intensified through increased funding and subsequent acceleration and refining of support activities, such as the development of elite sport coaching, sport support personnel, sport technology innovation, hosting of major international championships, talent identification and support systems.

Financial support for elite sport is channelled through UK Sport. A significant increase in funding is evident in 2006/07, after the UK won the bid in 2005; the Government announced an additional £200 million of Exchequer funding in March 2006 (see Figure 4-2), as well as a transfer of responsibility of

¹⁰ Subject to stadium attendance.

functions (and funding) of the English Institute of Sport and the Talented Athlete Scholarship Scheme from Sport England to UK Sport. This influx of additional funding was used to resource increased investment in a range of programmes and initiatives.

Figure 4-2: UK Sport funding (£ millions)



Note: The baseline in the meta-evaluation is defined as 2003, which is the year the Government first committed support to London's bid

Source: UK Sport.

Medal outcomes is one of the key indicators of elite sport performance. With the exception of the Atlanta Games, Team GB's performance in terms of medals won and place in the medals table remained relatively stable prior to the 2003 baseline (including Athens¹¹).

Figure 4-3: Ranking and medals won (gold-silver-bronze)

	Seoul 1988	Barcelona 1992	Atlanta 1996	Sydney 2000	Athens 2004	Beijing 2008	London 2012
Olympic Games	12th (5-10-9)	13th (5-3-12)	36th (1-8-6)	10th (11-10-7)	10th (9-9-12)	4th (19-13-15)	3rd (29-17-19)
Paralympic Games	3rd (65-65-53)	3rd (40-47-41)	4th (39-42-41)	2nd (41-43-47)	2nd (35-30-29)	2nd (42-29-31)	3rd (34-43-43)

Source: UK Sport.

Following Team GB's performance in Atlanta in 1996, lottery funding was committed to elite sport, which helped to improve performance in 2000 and 2004 back to and above the pre-Atlanta levels.

In 2008 and 2012, Team GB's performance increased significantly as compared with the pre-baseline. This success is likely to be due to a number of factors, with the most notable being the substantial increase in funding since the UK won the bid for the 2012 Games in 2005. Combined UK Sport funding for the 2008 and 2012 Games for Team GB was approximately £500 million, an increase of around

¹¹ Given the proximity of the Athens performance to the baseline, the Athens performance has been incorporated in the baseline, as preparation predated 2004.

£370 million on the combined funding for the 2000 and 2004 Games. In addition to funding, the effect of hosting the 2012 Games is also likely to have had an impact on success.

Performance outcomes in future Games will be relevant to making a judgement as to whether or not a sustainable long term legacy in relation to elite sport performance is in place. It is well documented that the nation hosting the Games has a pre-hosting increase in medals success as well as a further increase in the year they host their home Games. Although there is normally a decrease in performance the year following a home Games, the level of success is usually still seen to be greater than that prior to winning the bid. Team GB's performance in Rio 2016 will therefore be important in determining the overall impact of the 2012 Games on elite sport.

Medal performance in 2012 does suggest that for many sports the Games have put in place the sporting infrastructure required to sustain a world class, high performance system, to support elite sport across the UK.

4.4 International

The international sub-theme is focused on investment around sport and international development. The key legacy programme associated with this sub-theme is International Inspiration, although other programmes and initiatives, including many of the activities associated with the PGTCs, have also helped to drive the international agenda.

International Inspiration as announced by the then Prime Minister in India on 21 January 2008, brought into reality the 'Singapore Vision' – the promise made by the London 2012 bid team to "*reach young people all around the world and connect them to the inspirational power of the Games so they are inspired to choose sport*".¹² The aspiration is to reach 12 million children in 20 countries and the programme aims to use the power of sport to enrich the lives of millions of children and young people of all abilities, in schools and communities across the world, particularly in developing countries, through the power of high quality and inclusive physical education, sport and play.

International Inspiration reached 12 million children over 20 countries by July 2011. A range of participation and other opportunities were provided to these children including, for example, 1.5 million children undertaking sports activities in India, 460,000 children involved in sports festivals in Brazil and 200,000 children undertaking PE classes in Mozambique.

There have been a range of supporting activities and other impacts which have facilitated this participation, including more coaches and PE teachers trained, changes to the PE curriculum in some countries, partnerships between schools in different countries being formed, young leaders trained, and policy changes and developments to support increased and on-going participation.

Through International Inspiration, the UK has been able to support the further development of sport and participation in sport in other countries, such as:

- India: where there has been a change in school curricula with sport being further and better embedded;
- Azerbaijan: where two new pieces of legislation have been introduced protecting the rights of all children to play and take part in sport;
- Palau: where the Ministry of Education and Palau National Olympic Committee are working to ensure sustainable systems are kept in place to support the development and delivery of PE in schools;
- Trinidad and Tobago: where the Government and the UK Government are partnering to pledge continued support for International Inspiration;
- Nigeria: where the development of a landmark school sports policy is underway which will protect the rights of girls and disabled children.

¹² UK Sport website.

In addition, over 270 UK schools are linked to partner schools around the world, providing on-going opportunities to influence the role of sport in other countries.

Five International Inspiration ambassadors are also able to influence and bring about change in policy, legislation and school curricula.

Having achieved its initial vision of reaching 12 million children and young people in 20 countries, International Inspiration will now focus on ensuring the programme is sustainable, leaving a lasting legacy in these countries after the final year of the programme in 2014.

Section 5: Exploiting opportunities for economic growth

Headline research question: What have been the economic impacts of the Games, particularly in terms of employment and GVA?

Key findings:

- The £6.5 billion of Olympic Delivery Authority (ODA) spend on the construction of the venues and Olympic Park infrastructure is estimated to have resulted in a gross impact of £8.2 billion of GVA and approximately 177,000 job years of employment in the UK over the 2007 to the end of Q1 2012 period. Net impact, taking into account potential displacement of other activity, is estimated at £7.3 billion of GVA and 160,000 job years of employment.
- The CompeteFor programme has been effective at raising awareness of Games-related contract opportunities for micro-enterprises and small businesses. Over 140,000 businesses were registered on CompeteFor by the end of 2010/11.
- The London Employment and Skills Taskforce for 2012 (LEST) programme of Games-related employability and skills projects in London had helped 34,500 into employment by the end of 2010/11 (against a milestone of 36,000).
- Independent reviews undertaken by the Commission for a Sustainable London 2012 (CSL) indicate there is considerable potential for the Games to contribute to sustainable development through demonstration effects in the areas of construction, infrastructure development and the staging of mega events.

The key economic legacy objective of the 2012 Games is to exploit to the full the opportunities for economic growth offered by hosting the Games. There are a variety of ways in which the Games can lead to economic benefits for the UK, most notably through the employment benefits and impacts on businesses arising from the construction of the venues and infrastructure and staging of the Games, additional visitors during 2012 and associated expenditure, skills and employment initiatives, and longer-term impacts on the UK's reputation as a place to visit and invest.

5.1 Economic impact of construction spend

The majority of economic impacts in the period leading up to the Games relate to the direct effects of £6.5 billion of expenditure by the ODA on the development of the venues and infrastructure over the 2007 to the end of Q1 2012 period. It is estimated that this ODA spend may have resulted in a:

- 'Gross' impact of £8.2 billion of Gross Value Added¹³(GVA) in 2008 prices and approximately 177,000 job years of employment in the UK;
- 'Net' impact (ie taking into account displacement) of £7.3 billion of GVA in 2008 prices and nearly 160,000 job years of employment in the UK.

¹³Gross Value Added (GVA) is a measure of the value of goods and services produced in an area, industry or sector of an economy.

Figure 5-1 summarises how the 'net' GVA and 'net' employment impact are distributed throughout the UK.¹⁴

Figure 5-1: 'Net' regional GVA and employment impacts of ODA spend (2008 prices)

	Total Output (£m)	Total GVA (£m)	Total Job Years of Employment	Total Earnings (£m)
London	£5,120	£2,800	39,500	£1,170
South East	£2,270	£1,050	24,990	£580
East of England	£2,100	£950	23,250	£520
West Midlands	£1,270	£580	16,610	£320
East Midlands	£820	£380	11,040	£210
North West	£870	£370	9,810	£200
Yorkshire and the Humber	£620	£280	7,820	£150
Scotland	£590	£290	7,310	£150
South West	£570	£270	8,200	£140
North East	£250	£120	2,990	£60
Wales	£240	£110	4,390	£70
Northern Ireland	£190	£80	2,710	£50
Total	£14,910	£7,280	158,620	£3,620

Source: Oxford Economics.

As the table shows, London, the South East and East of England have enjoyed the bulk of economic benefits from ODA spend, although significant benefits have accrued to all nations and regions. The next phase of economic modelling (for Report 5) will seek to capture other economic impacts such as tourism, inward investment, skills, Olympic Park transformation and wider East London regeneration.

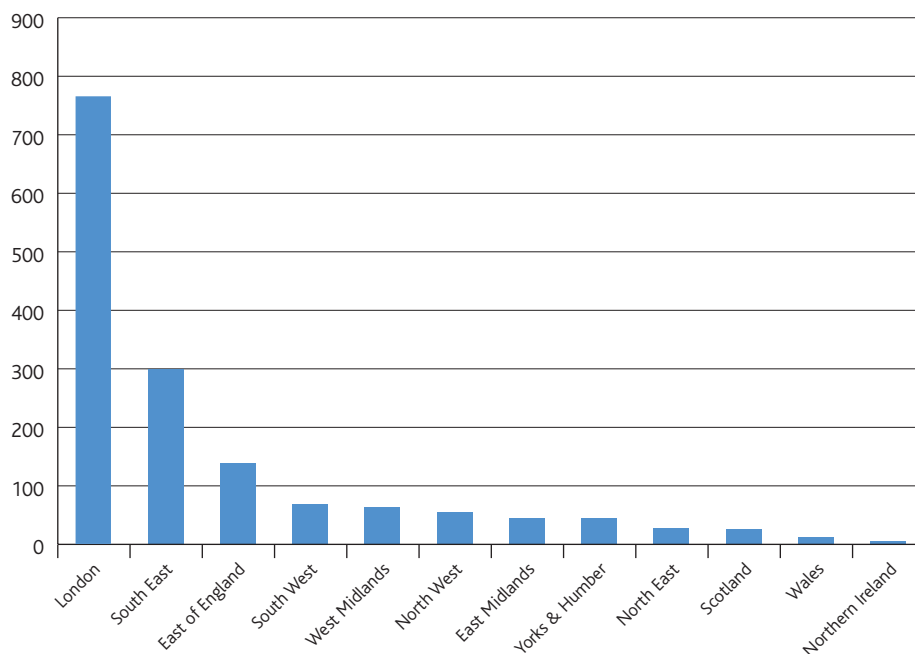
5.2 UK business access to 2012

The primary focus of this sub-theme is the effectiveness and impacts of the CompeteFor programme, a major legacy initiative that aimed to ensure fair and open access to information on Games contract opportunities to enable businesses to bid for contracts regardless of their size and location. Stakeholder evidence indicates that it is very unlikely that an e-procurement initiative of the scale and ambition of CompeteFor that was targeted at small and medium-sized enterprises would have gone ahead without the Games. This means that the legacy benefits of the programme, including the longer-term reputational benefits to businesses that have accessed contracts through CompeteFor and any elements of the service which are sustained should be considered wholly additional. The longer term impact of Games contracts on UK businesses will be examined using evidence from the final evaluation of CompeteFor.

¹⁴ The location of spend has been determined by postcodes in the ODA's financial monitoring data. These postcodes relate to the location of the office receiving payment and not necessarily the location where the activity has taken place.

The CompeteFor interim evaluation¹⁵ indicates that the initiative has been effective at raising awareness of contract opportunities for micro-enterprises and small businesses. Monitoring data indicates that the programme has also achieved a good geographical spread in terms of businesses registered on the system. However, data on the regional distribution of the ODA contracts shows that 54% of all contracts were awarded to companies in London and a significant proportion to companies based in the South East.¹⁶ Analysis of CompeteFor contract short-listing has shown that micro-enterprises are significantly less likely to have been short-listed whereas firms located in London and those who have been trading for more than 5 years were significantly more likely to have been short-listed, indicating that despite the good geographical spread of registered companies and effectiveness in raising awareness to micro-enterprises there are still firm characteristics beyond the control of CompeteFor which influence the distribution of contract awards.

Figure 5-2: Number of ODA contract awards by region



Source: Nations and Regions Group, data up to February 2012.

5.3 Promoting the UK as a place to invest

There is an expectation that the 2012 Games will provide additional exposure for London and help to influence business perceptions of the benefits of locating in the UK. The British Business Embassy was the key initiative to take advantage of this during the Games as over 4,700 delegates attended across 18 days of trade and investment conferences. The Global Investment Conference, which was the flagship event of the British Business Embassy on the day before the Opening Ceremony, attracted around 200 global CEOs (two thirds of the international delegates) from 29 countries. It is understood that future evaluation work will examine the degree to which Games-related initiatives such as the British Business Embassy and Global Investment Conference in the period leading up to and during the Games have influenced levels of inward investment.

A recent Cushman and Wakefield survey of world cities indicates that the percentage of international business leaders believing that London was doing the most to promote itself increased significantly from

¹⁵ Evaluation Partnership (2011). BIS and RDAs: Interim Evaluation of CompeteFor.

¹⁶ This data should be considered in the context of the point made in footnote 14 concerning the distinction between location of offices receiving payment and activity.

16% in 2010 to 25% in 2011.¹⁷ It may be that promotional activity around the Games has played some role in this increase. Monitoring data from London and Partners, the promotional agency for London, indicates that Games-related promotional activity has influenced 114 recent investment projects in London.

UKTI monitoring data indicates that 520 international companies that bid through CompeteFor for 2012 contracts have been advised by UKTI on inward investment opportunities in the UK. It is expected that future evaluation work will assess the significance of the Games and the CompeteFor service in influencing these decisions.

5.4 Export and trade promotion

The rationale for the export and trade promotion sub-theme is the expectation that the international spotlight on the UK will open up new export markets to UK companies. The legacy strategy anticipates that the build up to the Games, and particularly the Games period, would give UK businesses the opportunity to showcase and promote UK innovation, enterprise and creativity, and give rise to opportunities to access new export markets and international contracts. There is also potential for businesses to build on their successes in delivering Games contracts by exploiting reputational benefits in international markets.

It is expected that future Government evaluations will address the impacts of the Games on the exporting performance of UK businesses. Data from the final CompeteFor evaluation due to be completed later in 2012 will allow for an exploration of the impact of Games-related contracts on export opportunities.

5.5 Tourism

The 2012 Games and associated events such as the Cultural Olympiad provided an opportunity to attract a large volume of overseas and domestic tourists to London and other areas of the UK staging Games events. The Games also provided an opportunity to secure longer-term promotional impacts by using the event to showcase London and the UK as tourism destinations. Campaigns designed to enhance the tourism outcomes of the Games have the twin objectives of addressing any displacement of visitor numbers and using the Games and the events around it as a means to promote the UK as a place to visit.

A comprehensive impact study for London and Partners carried out before the Games assessed the net tourism gain to the UK economy of the Games at £1.24 billion (at 2011 prices) for the period 2007-2017.¹⁸ It is estimated that the majority of the tourism impacts will occur in the legacy period (2013-2017) as London and the UK as a whole benefit from increased visitor numbers due to exposure in international markets, especially emerging markets.

The estimates above take into account various displacement effects; however, key promotional campaigns such as 'Holidays at Home are Great' (Visit England) and 'Limited Edition London' (London and Partners) are designed to soften some of the negative impacts felt by previous Olympic host cities. The first evaluations of Games-related marketing campaigns are scheduled to be completed later in 2012.

A DCMS survey of visitors to Olympic and Paralympic ticketed events and the International Passenger Survey will provide evidence on visitor numbers and how the Games have impacted on perceptions of the UK as a place to visit. It may also be possible to assess impact of the Games on international perceptions of the UK using the Anholt Nations Brand Index.

¹⁷ Cushman and Wakefield (2005-2011). European Cities Monitor.

¹⁸ London and Partners (2011). The Value of the London 2012 Olympics to UK Tourism: Updated estimates, Oxford Economics.

5.6 Employability and skills development

The key initiative aimed at helping workless people into employment through the Games is the LEST 2012 programme of employability and skills projects in London. The interim evaluation of the programme concludes that in the absence of the Games it is highly unlikely that the LEST 2012 platform would have been developed to its size and structure with the same strategic focus.¹⁹

The interim evaluation of LEST indicates that the programme was just short of its trajectory to use the Games to reduce worklessness in London by 70,000 by 2012. By the end of 2010/11, the programme had helped 34,500 into employment against a milestone of 36,000 for the end of that year. It should be noted, however, that jobs are expected to last for just a year on average, so these impacts are assumed to be relatively short term and further research is needed to examine how far the projects have enabled people to move into sustainable employment. It is important to note that the reduction of worklessness figures relate to the impacts of Games-related programmes which covers a wider range of activity than the direct impacts of construction considered in Section 5.1.

Evaluations of regional skills and employability programmes such as the rollout of Personal Best outside of London provide evidence of significant Games-related employability and skills impacts to date across the nations and regions.

5.7 Promoting sustainable business

CSL, the independent body which monitors and assures the sustainability of the 2012 Games, indicates there is considerable potential for the Games to contribute to sustainable development through demonstration effects particularly in the areas of construction, infrastructure development and the staging of mega-events.²⁰

Key sustainability targets achieved by the ODA include:

- All permanent venues being at least 15% more energy efficient than 2006 building regulations;
- BREEAM²¹ excellent rating for all permanent venues;
- At least 20%, by value, of construction materials of a reused or recycled source;
- 98% of demolition material reused or recycled.²²

CSL evidence also indicates that London Organising Committee of the Olympic and Paralympic Games (LOCOG) is on course to achieve many of the sustainability targets for staging the Games. In December 2012, LOCOG will publish the post-Games Sustainability Report and CSL will publish an initial qualitative review of the sustainability of the staging of the 2012 Games.

The CSL 'Making a Difference' report, expected to be published in early 2013, will provide a full assessment of the extent to which new standards of sustainability arising from London 2012 are beginning to be adopted by wider industries.

5.8 Disability

Evidence has been gathered on how the 2012 Games have helped to increase the participation of disabled people in the economy. The latest LOCOG employment and Skills Dashboard (May 2012)

¹⁹ PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix B LEST Evaluation (Final Report).

²⁰ Commission for a Sustainable London 2012, Assuming a Legacy – promises, progress and potential: a review of legacy across the London 2012 programme, March 2012; Commission for a Sustainable London 2012, Preparations Review (February 2012).

²¹ British Research Establishment Environmental Assessment Method.

²² Commission for a Sustainable London 2012. Annual Review 2011/12.

indicates that 6% of LOCOG's paid workforce are disabled which is at the upper end of the target range of 3-6%. The proportion of disabled people placed into work by the ODA's Jobs Brokerage was 6% against a benchmark target of 3%.

The review has also highlighted some notable impacts on accessibility for disabled people in respect of London's transport network which can help to increase participation. Major improvements influenced by the Games include the introduction of step free access in Green Park, Kings Cross and Southfields stations.

Section 6: Promoting community engagement and participation

Headline research question: What have been the social impacts of the Games, particularly in terms of volunteering, the cultural sector and community engagement?

Key findings:

- Games-related projects have successfully captured the interest of large numbers of people across the country, as evidenced by attendance at events including 15 million people seeing the Olympic Torch Relay.
- The Games have provided many new opportunities for volunteering, including up to 70,000 people recruited as Games Makers.
- Prior to the Games it was estimated that there had already been more than 16 million attendances at Cultural Olympiad events.
- The Games have provided a unique opportunity to inspire children and young people, including extensive work with schools, colleges and universities. Over 26,000 schools registered with Get Set, a scheme to use the Games to enhance the learning experience.
- The sustainability commitments associated with the Games are being used as means to encourage uptake of more sustainable behaviours.

The aim of this legacy theme is to promote community engagement and participation to make the most of the potential of the 2012 Games to drive social change in order to create more cohesive and proactive communities.

There is already some early evidence to suggest that the Games have had a positive social impact. Activity concerned with community engagement and volunteering continued to gather pace during Games-time, although a significant number of events had already taken place prior to the Opening Ceremony.

6.1 Volunteering and social action

Activity in this sub-theme is concerned with increasing opportunities for volunteering and encouraging social action in order to bring direct benefits to people and communities, and is centred on three major initiatives:

- Games Maker: the London 2012 volunteer programme;
- London 2012 Inspire Mark: which provides recognition for community projects which are inspired by the Games;
- Olympic and Paralympic Torch Relays: which travelled around the UK aiming to bring together and inspire communities.

In addition, there have been numerous other volunteering programmes which are related to, or inspired by, the Games, such as Host City Ambassador programmes, along with efforts to support volunteering more widely.

Our baseline analysis shows that participation in volunteering has experienced a small decline year on year since peaking at 44% in 2005 and falling to 40% in 2009-10.²³ In the absence of the Games, this trend would have been expected to continue; however, it is hoped that efforts to use the Games as a means to inspire volunteering and social action will generate an increase in volunteering behaviour.

Games-related projects have been successful in capturing the interest of large numbers of people across the country, which has resulted in the recruitment of volunteers and engagement with local communities. Over 240,000 people applied to be Games Makers and in the region of 70,000 were recruited to take on a wide variety of roles. There is also some evidence that those who have participated in Games-related activity (notably Inspire Mark projects and Spots v Stripes²⁴) intend to continue being involved in their local community and perceive that this activity has helped to increase community cohesion in their neighbourhood, suggesting that this activity is having a positive social impact. However, a more extensive evidence base will begin to emerge by the end of 2012, including findings from a survey of Games Makers (which will provide important evidence related to the motivations and experience of volunteers).

6.2 Culture

Engaging and inspiring the next generation of performers and audiences is a key legacy objective to be met by providing an opportunity for everyone to celebrate London 2012. It is also intended that this activity will leave a lasting legacy for culture and the arts across the UK.

Levels of engagement with the arts, and culture more generally, in the adult population have remained unchanged in recent years prior to 2012²⁵ and in the absence of the Games it is expected that this static trend would have continued. However, the extensive programme of cultural activity which accompanies the Games provides an opportunity to stimulate an increase in participation.

The London 2012 Cultural Olympiad was a four year programme of activity comprised of a range of programmes and projects inspired by the Games and culminating in the London 2012 Festival which took place between 21st June and 9th September 2012. Overall, the programme enabled thousands of events and activities across the full range of art and cultural forms.

The culture sub-theme has strong links to the Inspire Mark programme with culture (chosen by 22% of respondents) emerging as the second most popular project theme after sport in the first wave survey of Inspire Mark project leads. In addition, 31% of respondents overall reported that their project had links to the Cultural Olympiad (see Figure 6-1).²⁶

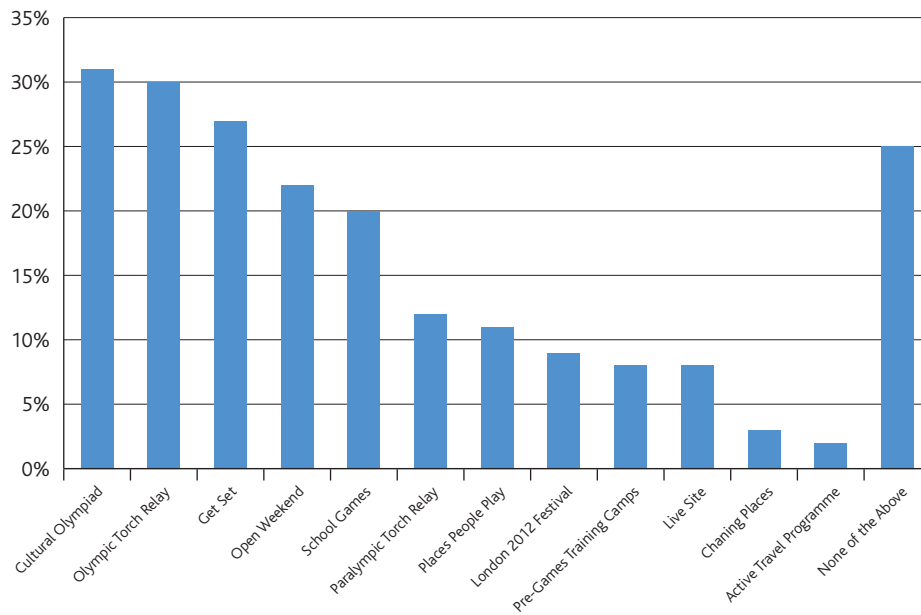
²³ Citizenship Survey. Percentage of the population volunteering at least once in the last 12 months.

²⁴ Survey of Inspire Project Leads – Wave 1 (Nielsen/LOCOG, 2012); Cadbury Spots V Stripes Community Impact Report 2011.

²⁵ Grant Thornton et al (2012). Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 3 – Baseline and Counterfactual.

²⁶ Survey of Inspire Project Leads – Wave 1 (Nielsen/LOCOG, 2012).

Figure 6-1: 'Does your Inspire Mark project link to or support any of the following Olympic or Paralympic related projects or activities?'



Source: Survey of Inspire Mark project leads (Nielsen/LOCOG, 2012).

Prior to the Games, it was estimated that there had been more than 16 million attendances across the UK at Cultural Olympiad events and over 169,000 attendances at more than 8,300 workshops.²⁷

Evaluation of the Cultural Olympiad is underway, including an audience survey, and this will provide a valuable insight into the achievement of the legacy objectives for the arts and culture. Data from Legacy Trust UK²⁸ and the Inspire Mark project survey also show that projects have successfully attracted a significant number of participants/audience members indicating a positive effect on community engagement.

6.3 Engaging children and young people

The success of the 2012 Games in inspiring and enhancing the education of children and young people, and in promoting social inclusion is the focus for this sub-theme.

Educational attainment and attendance in schools has generally been improving across England in recent years. However, performance in the host boroughs has tended to lag behind the national average and it is hoped that the inspiring effect of the Games will help to encourage an improvement.²⁹

Get Set was the official London 2012 education programme. It was developed for schools and colleges across the UK and delivered through an online platform which provided a range of resources targeted at 3-19 year olds, aiming to enhance their learning experience.

Other activities relevant to this sub-theme include:

- Podium: the further and higher education unit for the Games;
- Higher Education Funding Council for England: work to inform and support the higher education sector's response to opportunities provided by the Games;

²⁷ <http://www.london2012.com/about-us/cultural-olympiad/index.html> (accessed 24/05/12).

²⁸ Legacy Trust UK Interim Review (2012).

²⁹ Grant Thornton et al (2012). Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 3 – Baseline and Counterfactual.

- Opportunity Inspired by London 2012: working with disadvantaged young people to give them the skills they need to put them on the next step towards employment, training or volunteering;
- Young Leaders: giving a group of disadvantaged young people the chance to make positive change to their lives, providing an opportunity for personal development through formal training, development and leadership coaching support.

The evaluation of Get Set³⁰ undertaken to date demonstrates that programme activities have successfully increased engagement and involvement in the Games amongst young people. The evaluation concluded that the programme achieved high penetration in terms of the proportion of eligible establishments which registered with the programme with over 26,000 schools registered. In addition, that participation had a positive effect on pupils and teachers and the view of teachers is that the programme helped to raise pupil aspirations, confidence/self-esteem and engagement in learning.

The Young Leaders programme successfully engaged with a group of disadvantaged young people and a high proportion reported that they had improved skills and built confidence as a result of taking part which suggests that the programme could have a positive impact on their future life opportunities.³¹ In addition, Opportunity Inspired by 2012 has made good progress towards achieving its target of supporting 500 disadvantaged young people.

6.4 Sustainable living

This sub-theme considers the extent to which the Games have inspired people to live more sustainably, for example by encouraging people to reduce their carbon footprint, be more energy efficient, make more sustainable travel choices and increase the amount of waste recycled.

Patterns of energy use, waste production and travel behaviour already indicate sustainable behaviour is improving.³² The 2012 Games were used as a means to convey messages around sustainability in order to accelerate positive attitudes towards sustainability and further increase the uptake of pro-environmental behaviours.

DEFRA's Inspiring Sustainable Living programme provided start-up grants for the following four projects aiming to help people to live more sustainable lives by drawing upon London 2012 as inspiration:

- Bio-Regional's One Planet Experience: an interactive exhibition centre in the London Borough of Sutton, plus an additional exhibition located in the Athletes' Village and related workshops offering practical help on energy saving, renewable energy, etc;
- Groundwork London's Transform Project: transformed derelict and neglected sites into local green spaces/community gardens, supported residents to create less waste/recycle more, and encouraged environmental volunteering and community involvement in the host boroughs;
- East Potential Inspired to Sustainable Living: provided practical advice and support to East Thames residents in Newham to increase understanding and practice of sustainable behaviours, plus work with Focus E15 Foyer residents to encourage healthy eating;
- Sustrans Active Travel Champions: provided training and support for volunteers to act as champions to encourage people to make healthier and more environmentally friendly travel choices in communities located close to Olympic venues in London and the South of England.

³⁰ Nielsen/LOCOG (2011). Get Set Evaluation Report, Phase 1, Sept 2010; Phase 2, Oct 2011.

³¹ Evaluation of the London 2012 Young Leaders Programme. Update December 2011 (Skyblue Research).

³² Grant Thornton et al (2012). Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 3 – Baseline and Counterfactual.

The ODA and LOCOG have also contributed to activity in this sub-theme:

- ODA provided funding to increase the capacity of the Mayor of London's RE:NEW and RE:FIT programmes (designed to improve energy efficiency in the host boroughs);
- LOCOG developed plans for communicating sustainability messages during Games-time to the media and directly to the public, including production of a Spectator App and the Walk in the Olympic Park trail.

Activity to inspire sustainable living has made good progress in terms of engagement with its target audiences. The host boroughs residents survey found that 21% of those who were aware of the sustainability commitments connected to the Games reported that they had been influenced by this, for example by recycling more. This is a positive outcome as it demonstrates that the sustainability messages connected to the Games are already encouraging local residents to adopt sustainable behaviours. As behavioural change can take time to occur and embed, data on the full extent of achievements related to this sub-theme can be expected to emerge over time.

6.5 Influencing attitudes towards disabled people

The 2012 Olympic and Paralympic Games provided a mechanism for influencing attitudes towards and perceptions of disabled people.

Our baseline study showed that there has been some improvement in attitudes towards disability in recent years.³³ The Games provided a significant opportunity to generate media coverage conveying positive messages about disabled people. It is hoped this will generate a significant change in public attitudes and perceptions.

Channel 4 undertook significant work to raise the profile of Paralympic sports and athletes in the two years prior to the Games, and stated its intention to use the event as an opportunity to influence perceptions towards disabled people. Viewing figures for Channel 4's pre-Games programming demonstrated public interest in learning more about disability and the Paralympics (eg 'That Paralympic Show' was estimated to have reached 5.4 million people overall). Channel 4 also successfully completed a talent search, resulting in the recruitment and training of seven new disabled presenters who appeared on screen during the Games.

Activity was focused on providing comprehensive television and multi-media coverage of the London 2012 Paralympic Games, alongside work to improve understanding of disability and encourage disabled people to participate in community activity and social action.

In addition, programmes such as Get Set helped to raise awareness of the Paralympics amongst children and young people. Half of the participating teachers surveyed in the Get Set evaluation believed that involvement in Get Set had helped to generate a positive change in pupil attitudes towards disability.³⁴

³³ Grant Thornton et al (2012). Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 3 – Baseline and Counterfactual.

³⁴ Nielsen/LOCOG (2011). Get Set Evaluation Report, Phase 1, Sept 2010; Phase 2, Oct 2011.

Section 7: Driving the regeneration of East London

Headline research question: What have been the impacts of the Games on East London, and in particular socio-economic and organisational change?

Key findings:

- Parts of East London now look, feel and function differently. The Games have created new sporting venues, catalysed significant transport and public realm improvements and leveraged wider private sector investment.
- By being bold and visionary the 2012 Games have "raised the bar" in delivering a lasting legacy, and in doing so "created a legacy blueprint for future Games".
- Nearly 10,000 new homes will be built in East London as part of the Games legacy – over a third of which will be family housing and nearly 40% affordable housing.
- Over 5,000 host borough residents were employed in the demolition and build of the Olympic Park and 4,000 in the building of the Athletes' Village.
- 69% of East London residents surveyed thought that the Games would be good for London as a whole.
- Based on key socio-economic indicators East London appears to be 'closing the gap' with the rest of London.

The regeneration of East London is a central component of the legacy of the 2012 Games. East London has suffered from long-standing problems of multiple deprivation and as a result it has historically been one of the poorest parts of the UK, struggling to keep pace with many of the socio-economic advances experienced elsewhere in London. The Games have provided a unique opportunity to tackle these issues and as such the legacy plans centre on:

- Ensuring that the Olympic Park can be developed after the Games as one of the principal drivers of regeneration in East London maximising the investment made in venues, infrastructure, utilities and the environment;
- Securing a socio-economic legacy from the Games in the host boroughs³⁵ so 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"*.³⁶

³⁵ The work is led and coordinated by a dedicated Host Borough Unit.

³⁶ Host Boroughs (2009). Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs.

7.1 Transforming place

The transforming place sub-theme is focused on the legacy effects and impacts arising from the planning, remediation and physical development of the Olympic Park, coupled with improvements to public transport and the public realm, as well as wider private sector investment in the immediate surrounding area.

It is a suite of activity that has already made a significant contribution to the physical transformation of East London. Based on the evidence available it is apparent that:

- Without the Games the remediation and clean-up of 2.5 sq km of largely derelict, polluted and inaccessible land would not have occurred. This process included the undergrounding of 52 power pylons, the demolition of more than 200 buildings, the creation of 100 hectares of greenspace, the creation of a new utilities network and building 30 new bridges and connections;
- Without the Games the new Olympic venues would not have been constructed and the Olympic Park would not exist;
- The hosting of the Games has had a catalytic effect on a number of significant transport improvements at Stratford station and on the North London Line, to name but two, as well as a number of public realm improvements throughout the host boroughs;
- The Games also leveraged wider private sector benefits. The most notable is the role that the Games played in bringing forward the Westfield shopping centre at Stratford City – and all the employment and economic benefits associated with it – by between five and seven years.

As a result of this activity, parts of East London look, feel and function differently to how they did before London was awarded the right to host the Games and, more importantly, to how they otherwise would be had London not hosted the 2012 Games. An illustration of the contrast between 2012 and 2008 is given below.

Figure 7-1: The Olympic Park in 2012 and 2008



Source: Olympic Delivery Authority. 2012 photograph looks South from Eton Manor. 2008 photograph looks South West across the northern part of the Olympic Park.

Organisations involved in delivering the physical transformation of the Olympic Park demonstrated a boldness (perhaps most apparent in the willingness to provide early investment in activities before the bid had even been won) and vision that not only enabled the Olympic Park site to be developed on schedule but also ensured that the regeneration benefits of the 2012 Games legacy for East London were driven forward from the earliest point possible.

It was an approach that led Jacques Rogge, President of the IOC, to comment on his final inspection visit in March 2012 that London had *“raised the bar on how to deliver a lasting legacy by incorporating long-range planning in every aspect of the 2012 Games”* and in doing so had *“created a legacy blueprint for future Games hosts”* with the *“tangible results”* already apparent in *“the remarkable rejuvenation of East London”*.³⁷

7.2 Transforming communities

The transforming communities sub-theme explores the legacy and impacts for local communities resulting from the construction of new homes, sport, leisure, education and health facilities, meeting the needs of residents, businesses and elite sport and raising satisfaction and improving cohesion. At the heart of this aim is the transformation of the Olympic Park, but it also includes public realm improvements and culture and arts projects.

In its role as custodian of Olympic Park post-Games, the LLDC (formerly the Olympic Park Legacy Company) has developed a comprehensive programme of legacy uses and developments to be delivered post-Games, including:

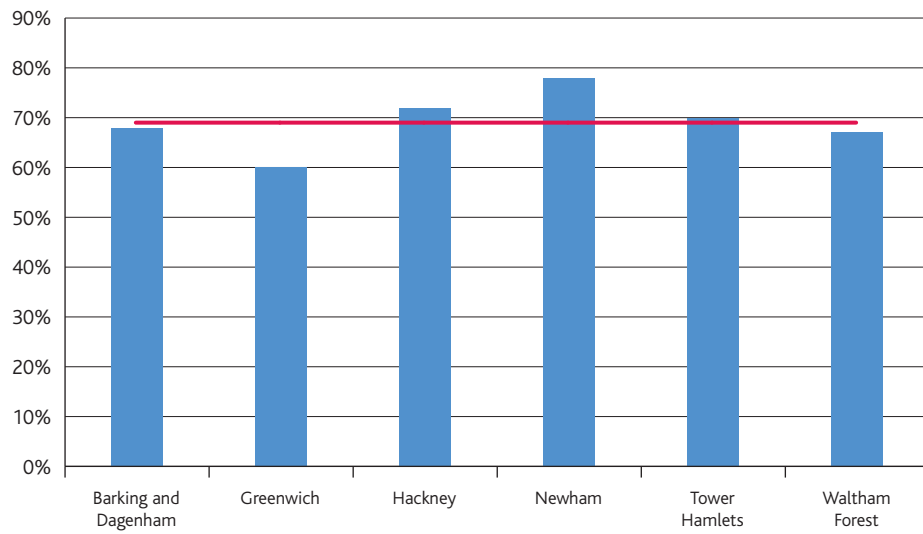
- Nearly 7,000 new homes, with 35% affordable and 42% family homes;
- Over 4,000 new jobs³⁸, with 75% for residents of the host boroughs and 35% for BAME residents;
- Over 2,000 construction jobs, 25% of which are estimated to be for local residents;
- 102 hectares of open space and 45 hectares of bio diverse habitat;
- Two primary schools, one secondary school and nine nurseries;
- Three health centres;
- A number of multi-purpose community, leisure and cultural spaces;
- A park and sports venues that will attract millions of visitors.

The potential of this transformation appears to already be impacting on local communities. When respondents to the host boroughs resident survey (which was carried out prior to the Games) were asked whether they thought that the Games would be good for London as a whole – based on what they had seen or heard – two-thirds (69%) of respondents felt that it would, with 37% ‘strongly agreeing’. In addition, a quarter (26%) of the respondents felt that the Games had made them more satisfied with their area as a place to live (compared to 10% who felt that it had made them less satisfied).

³⁷ DCMS (2012). Beyond 2012 The London 2012 Legacy Story.

³⁸ Excluding construction-related.

Figure 7-2: Proportion of respondents 'agreeing' that hosting the 2012 Games would be good for London as a whole



Source: Host boroughs resident survey.

Note: Red line shows the total for all respondents.

Respondents to the host boroughs resident survey were also asked to comment on the extent to which the preparations for the 2012 Games had already impacted on their local neighbourhood and the extent to which they will in the future. They were asked to think both positively and negatively. The most common responses are presented below.

Figure 7-3: Impact of hosting the Games on the local area

Positive impact of the preparations for the Games to date	Negative impact of the preparations for the Games to date
<ul style="list-style-type: none"> Improvement to retail & shopping facilities (48%) Improvement to the image of the local area (48%) Improvement to public transport (43%) 	<ul style="list-style-type: none"> Increased transport congestion in the area (50%) Increased number of people moving in/out of the area (44%)
Positive impact expected from the Games over the longer term	Negative impact expected from the Games over the longer term
<ul style="list-style-type: none"> Improvement to the image of the local area (54%) Improvement to the sports facilities in the local area (54%) Improvement to retail & shopping facilities (50%) 	<ul style="list-style-type: none"> Increased transport congestion in the area (49%) Increased number of people moving in/out of the area (48%)

Source: Host boroughs resident survey.

Note: Percentage relates to the number of respondents 'agreeing' that this was a positive or negative impact.

7.3 Transforming prospects

Transforming prospects focuses on Games activities that have directly or indirectly created employment for East London residents, along with wider initiatives designed to tackle worklessness. This includes:

- The construction of the Olympic Park and its associated venues;
- The activities of LEST 2012 that were focused on East London residents;
- A suite of 2012 Games-related activities delivered across the host boroughs to tackle worklessness and skills, such as the Local Employment and Training Framework (LETF), which is a £9.6 million project focused on developing skills, accessing work and supporting businesses in the host boroughs;
- The East and South East London City Strategy, a pilot scheme aiming to tackle worklessness and child poverty;
- The legacy uses of the Olympic Park which are expected to create a number of employment opportunities.

The evidence available suggests the preparation for and staging of the 2012 Games created a large number of job opportunities for local residents:

- 5,241 host borough residents were employed in the demolition and build of the Olympic Park. A further 4,507 employment opportunities resulted from the building of the Athletes' Village (as of December 2011);³⁹
- 612 host borough residents were part of LOCOG's paid workforce with a further 12,458 part of the contractor workforce fulfilling Games-time roles in hospitality, catering, cleaning, security, retail, ticketing and logistics (as of May 2012);⁴⁰
- Between 5,000 and 5,400 host borough residents were employed during the construction of Westfield shopping centre. Approximately 3,000 Newham residents (where the centre is located) are employed in its operation (a figure which is likely to increase if all host boroughs were included);
- As a result of the LEST programme between 8,663 and 10,600 jobs were created in the host boroughs (by March 2011), a proportion of which will be made up of the jobs opportunities noted above.⁴¹

These outcomes appear to have been driven forward by three factors: contractual requirements on development partners to recruit locally, employer engagement programmes and activities targeted specifically at workless individuals.

7.4 Convergence

This sub-theme has at its heart the aspiration 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"*.⁴² The activity within this sub-theme is encapsulated by the Strategic Regeneration Framework⁴³ (SRF): an *"expression of the host boroughs determination to use the 2012 Games as a catalyst to reduce poverty and transform the environment for the benefit of [all] citizens."*

To measure progress against this objective a clear set of measures, based on secondary data sources, have been constructed that allow a regular assessment of progress, both in terms of actual improvement against a 2009 SRF baseline, but also in comparison to the rest of London.

³⁹ ODA Cumulative Olympic Park and Athletes' Village contractor workforce total April 2008-December 2011.

⁴⁰ LOCOG (2012). Employment & Skills Performance 21/05/2012.

⁴¹ PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix B London Employment and Skills Taskforce for 2012 (Final Report).

⁴² Host Boroughs (2009). Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs.

⁴³ Host Boroughs (2009). Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs.

The most recent assessment of progress against the convergence objective was made in May 2012 and its results are shown in Figure 7-4. It is clear that, to date, good progress has been made with East London 'closing the gap' with the rest of London and on track to achieve 'convergence' on two-thirds of the indicators.

Figure 7-4: Progress by 2010/11 on convergence indicators

'Gap' reduced – convergence on track	'Gap' reduced slightly – convergence not on track
<ul style="list-style-type: none"> • 19 year olds achieving NVQ level 2 threshold • % of working age population with no qualifications • Proportion of children in working age families receiving key benefits • Pupils achieving at least Level 4 in English & Maths at Key Stage 2 • Pupils achieving 5 GCSE grades A*-C in maintained schools • 19 year olds achieving NVQ Level 3 threshold • Life expectancy – male • Life expectancy – female • % of children achieving a good level of development at age 5 • Mortality rates from all circulatory diseases at ages under 75 • Recommended Adult Activity (3 times 30 minutes per week) • Violent crime levels 	<ul style="list-style-type: none"> • Employment rate – aged 16-64 • Unemployment rate 16+ • Working age population qualified to at least NVQ Level 4 • Obesity levels in school children in year 6 • No Sport or activity (0 times 30 minutes per week)
'Gap' increased – convergence not on track	New indicator – progress tracked from 2012/13
<ul style="list-style-type: none"> • Median earning for full time workers living in the area 	<ul style="list-style-type: none"> • Improved street and environmental cleanliness • % of households defined as overcrowded • Overall satisfaction

Source: Host Boroughs Unit.

Section 8: Cross-cutting themes

8.1 Impacts by intended target groups

Cross-cutting research question: How far have the beneficial impacts so far accrued to their intended target groups/communities (including across measures of equality, inclusion and diversity)?

In order to assess the extent to which the impacts delivered to date have accrued to their intended target groups/communities it is necessary to explore the question from two perspectives:

- The first is spatial, and in particular the extent to which the Games have benefited East London, London as a whole, as well as each nation and region of the UK;
- The second is from the perspective of equality, inclusion and diversity and the extent to which the Games have benefited particular groups.

In terms of the spatial distribution, the results from our economic modelling indicate that net economic benefits from the 2012 Games have accrued to all of the UK's nations and regions. London has enjoyed the greatest benefits, with 39,500 job years of net employment and an additional £2.8 billion of net GVA generated, and Northern Ireland the least (although it has still benefited from 2,700 job years of net employment and £80 million of net additional GVA).

The nations and regions have also benefited from the local delivery of a number of activities and legacy programmes related to the Games. This includes programmes delivered by Sport England, such as Places People Play and the School Games, the LOCOG Inspire Programme and the PGTCs. Across all of the nations and regions these activities have provided a range of opportunities for young people and adults to engage with the Games; participate in sport, physical activity and culture; as well as providing significant investment in sporting facilities throughout the UK.

Within London, host borough residents have already experienced a significant number of benefits. These include:

- Transport improvements, such as the doubling of the capacity of Stratford station;
- Improvements to the public realm, such as town square improvements;
- Development of the Westfield shopping centre;
- Construction of the Olympic Park;
- Employment opportunities, a notable proportion of which will have benefited workless Londoners (eg 37% of host borough beneficiaries of the LEST programme had never been in paid work before).

In terms of how the 2012 Games have impacted on different target groups to date, the evidence points to a range of benefits. The Taking Part survey shows that those from a black and minority ethnic group taking part in sport and physical recreational activity, cultural activity or voluntary work are around three times more likely to be motivated to do more by the Games than the general population. Young people are also more likely to say they have increased their participation in those activities as a result of the Games, with 14.7% of 16-24 year olds motivated to do more sport or recreational activity and 13.9% motivated to do more voluntary work, supporting the Games vision to "*inspire a generation*".

The same questions from the Taking Part survey indicate that disabled people are less likely than the general population to say the Games have motivated them to do more sport and physical activity, though 4.5% of disabled people participating still say the Games have motivated them to do more. Benefits to disabled people have been identified from a number of specific schemes. For example:

- 5.9% of those who engaged in Sportivate, a nationwide campaign to provide teenagers and young adults (14-25) with coaching in a sport of their choice, identified themselves as disabled;
- Participation by disabled people is seen as a priority for both School Games and Places People Play. The latter has dedicated £8 million of funding to tackling barriers faced by disabled people;
- International Inspiration activities have focused on engaging women and disabled people.

The evidence also points to engagement with and participation by young people. For example, the Get Set Programme, designed for schools and colleges to use the Games to enhance their learning experience, has engaged with a high proportion of eligible establishments (82% of the target).

Equality and inclusion have also been important components in the design and construction of the Olympic Park. For instance:

- The ODA, LLDC and LOCOG have considered accessibility issues for participants and spectators in venue design;
- The ODA Job Brokerage programme has performed well for different equality groups in terms of those recruited to work on the construction of the Olympic Park:
 - 17% of recruits were women, against a target of 11%;
 - 6% were disabled people, against a target of 3%;
 - 60% were BAME, against a target of 15%.

8.2 Disability

Cross-cutting research question: How far have the Games changed attitudes to disability, and increased the participation of disabled people in sport, the economy, volunteering and culture?

The evidence available at this stage suggests that some progress has been made in terms of increasing the participation of disabled people:

- The British Paralympic Association believes that the 2012 Games have helped to change attitudes by increasing awareness of the Paralympics. Monitoring data suggests that there has been an increase in opportunities for disabled people to take part in sport, for example through Sportivate sessions and £8 million of Places People Play funding (as noted in Section 8.1) has been allocated to removing the barriers faced by disabled people when participating in sport;
- Equality and inclusion was an important consideration in venue design and build, with consideration of accessibility issues for participants and spectators alike;
- London's staging of the Games helped to prompt or bring forward improvements in accessibility for disabled people on the transport network (eg step free access at a number of underground stations including Kings Cross and Green Park);
- A total of 6% of LOCOG's paid workforce were disabled which is at the upper end of the target of 3-6% and the proportion of disabled people placed into work by the ODA's Jobs Brokerage was also 6% (against a target of 3%). Disabled people have also benefited from Games-related employability and skills projects, although further research would be required to assess how far this participation has led to sustainable employment;

- The Games provided numerous opportunities for disabled people to get involved in events and activities in their local communities. The forthcoming Cultural Olympiad evaluation is expected to give an insight into how successful this activity has been at engaging disabled people;
- The host boroughs residents survey explored the influence of the Games on participation. 13% of respondents reported having a 'longstanding illness disability or infirmity'. Within this group the influence of the Games was most apparent in terms of participation in sport. Although the sample size is clearly small, some 47% (77) had done some form of sport or recreational physical activity in the past 12 months; 18% (15) of whom stated that hosting the Games had encouraged them to do more. A lower level of influence was reported in relation to participation in cultural activity and volunteering.

In addition, there are a number of examples of Games-related projects and activities which have sought to influence attitudes towards disability, including programmes on disability and disability sports which were broadcast on Channel 4 in the lead up to the Games.

Evidence on the extent to which the 2012 Games have changed attitudes towards and perceptions of disability will be provided by a specially commissioned module of the British Social Attitudes survey which is being undertaken during 2012.

8.3 Sustainable development

Cross-cutting research question: How far have the Games contributed to sustainable development, in particular through demonstration effects and the encouragement of behavioural change?

CSL indicate that there was considerable potential for the Games to contribute to sustainable development through demonstration effects particularly in the areas of construction, infrastructure development and the staging of mega-events. Targets achieved by the ODA include:

- All permanent venues being at least 15% more energy efficient than 2006 building regulations;
- BREEAM excellent rating for all permanent venues;
- At least 20%, by value, of construction materials of a reused or recycled source;
- 98% of demolition material reused or recycled.⁴⁴

The CSL has highlighted some positive developments around the sustainability learning legacy, notably the ODA Learning Legacy initiative and ongoing dissemination activity, but has also expressed concern that there has yet to be comprehensive roll out of key principles across Government. The CSL 'Making a Difference' report, expected to be published in early 2013, will assess the extent to which new standards of sustainability arising from London 2012 are beginning to be adopted by wider industries.

From a legacy perspective, it can be concluded the development of the Olympic Park and its infrastructure conforms to strong sustainability principles. The development of the Olympic Park has involved:

- Creation of over 100 hectares of greenspace (which will remain in legacy uses with 45 hectares of bio-diverse habitat);
- Planting of 4,000 semi-mature trees;
- Restoration of existing waterways;

⁴⁴ Commission for a Sustainable London 2012. Annual Review 2011/12.

- Creation of an integrated water management system comprising sustainable urban drainage, water capture, cleaning and reuse, flood risk management, water demand reduction, habitat creation and non-potable network;
- A process of habitat and species relocation through the collection of seeds and plant cutting prior to demolition.

This activity has resulted in the physical transformation of a largely derelict and polluted site.

Monitoring data for the DEFRA-funded Inspiring Sustainable Living projects (see Section 6.4) suggests that efforts to use the 2012 Games to inspire sustainable behaviours are progressing well, especially with regard to generating interest and engagement amongst the target audience. However, it is too early to assess the extent to which these projects, or the Games more generally, have helped to inspire behavioural change. Further evidence will come from post-Games project-level evaluations and also from more general indicators of sustainable behaviour (such as resource and energy use).

Within the host boroughs, the residents survey suggests that the Games have been influencing behaviour and attitudes towards sustainability. Of those who responded, 29% were aware that the 2012 Games are aiming to be the greenest ever. Although of those, three-quarters (78%) said that the Games had not caused them to change their behaviours with regard to sustainability. However 21% of respondents said the Games had prompted a change, including:

- 10% said that it had prompted them to increase recycling;
- 10% said that it had prompted them to protect their local environment;
- 7% said that it had prompted them to conserve water/reduce water wastage;
- 7% said that it had prompted them to adopt more environmentally friendly transport behaviour;
- 4% said it had prompted them to reduce energy consumption;
- 3% said that it had prompted them to change their attitude to sustainability.

8.4 Well-being

Cross-cutting research question: In what ways have the 2012 Games and associated activity contributed to well-being?

Drawing on the evidence available for the interim evaluation, it is possible to conclude that the 2012 Games and associated activity may have contributed to well-being in four broad ways.

Firstly, recent Taking Part survey data indicates that those intending to engage with the 2012 Games, either through actively following (an average happiness score of 8.1), attending events (7.9) or volunteering for a Games time role (8.3) were significantly happier than those who did not plan to follow the Games (7.5). Further data is required to understand causality but this does appear to be a positive finding.

Secondly, analysis of evidence from Taking Part surveys indicates that subjective well-being (or happiness) and perceptions of health are linked to sports participation. Based on the evidence available to date it is apparent that the investment in legacy programmes and initiatives aimed at increasing sport participation has facilitated participation by adults and young people.

- Taking Part survey data indicates increases in adult participation in sport, with those participating in at least one 30 minute session of moderate intensity sport in the last week increasing from 41.2% in 2005/06 to 43.8% in 2011/12. The Games had also motivated 7.3% of those participating in sport and recreational physical activity to do more;

- The host boroughs resident survey suggests that the 2012 Games have played a positive role in encouraging East London residents to do more sport or recreational physical activity, with a fifth (18%) of respondents saying that the Games had motivated them to do more. This increased for those aged 16-24 (25%), those not working (24%), those of a 'non-white' ethnicity (29%) and those who live in Newham (30%). The reasons given for this included: 'more interested in sport in general' (50%); encouragement to 'take part in sport more often' (29%); and an introduction 'to new sports' (13%);
- In a survey of the Inspire programme, organiser perceptions were that 73% of the projects impacted on the health and fitness of participants. Positive health benefits at the individual level from participation in sport and physical activity are evidenced in the academic literature⁴⁵, with physical activity (of a certain duration and intensity) delivering health benefits. However it needs to be recognised that while there is a demonstrated causal relationship, it is also true that improved health enables increased sport participation.

Third, the 2012 Games may have positively impacted on well-being by reducing worklessness, particularly amongst the long-term unemployed. By the end of 2010/11, the LEST programme in London (a programme designed to maximise the employment and skills benefits of the 2012 Games) had helped 34,500 people into employment, against a milestone of 36,000 for that time period. While it is safe to assume that this will have had a positive impact on supported individuals beyond the direct benefit of additional income, specific data on how it has impacted upon well-being are not available.

Finally, and again drawing on the findings from the host boroughs resident survey, it is apparent that the 2012 Games have positively contributed to well-being by improving the overall satisfaction of East London residents with the area in which they live, with a quarter (26%) of the respondents feeling that the Games had made them more satisfied (although, 10% felt that it had made them less satisfied). Again, while evidence of causality is not available it can be assumed that satisfaction with the area in which you live is likely to be one of many drivers of well-being.

8.5 International profile

Cross-cutting research question: What have been the impacts of the staging of the Games on the international profile and reputation of the UK, London and East London?

The Games have provided a platform for UK businesses to showcase their capabilities particularly those that have benefitted from Games contracts and the delivery of facilities and infrastructure in the Olympic Park. It has also provided a unique opportunity to promote London and the UK as places to invest.

During the 18 days of the British Business Embassy held during the Games period, the UK government welcomed over 4,700 business leaders and global figures in what UKTI considered to be the largest and most ambitious set of trade and investment events ever held in the UK. The events showcased British business, design and technology to delegates and, through widespread press coverage, to the world. Businesses and Governments exchanged views and ideas, discussed challenges and developed new partnerships. UKTI expect the Games-time events to reap significant benefits for the UK economy both in terms of new export orders and inward investment projects. It is understood that future evaluation work will examine the degree to which Games-related initiatives in the period leading up to and during the Games have influenced levels of inward investment and exports.

The build up to the 2012 Games as well as the Games themselves are expected to have provided additional exposure for London and helped to influence business perceptions of the benefits of locating in the UK. A recent Cushman and Wakefield survey of world cities indicates that the percentage of international business leaders believing that London was doing the most to promote itself increased

⁴⁵ Grant Thornton et al (2011). Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 2 – Methods. Report 2 provides a more detailed description of the academic evidence.

significantly from 16% in 2010 to 25% in 2011.⁴⁶ It may be that promotional activity around the Games has played some role in this increase. Monitoring data from London and Partners, the promotional agency for London, indicates that Games-related promotional activity has influenced 114 recent investment projects in London.

The 2011 CBI London Business Survey which received over 250 responses from a cross-section of London businesses suggests that business leaders are generally positive about the potential impacts of the Games on promoting the UK internationally: 92% of respondents believed that the Games will help promote London internationally. The 2012 Games have also undoubtedly impacted on the look, feel and functioning of parts of East London. The Games have seen the creation of a number of world class sporting venues; it has catalysed significant improvements to Stratford International station; it has brought forward the development of Westfield Stratford City – the largest urban shopping centre in Europe; and it has seen the installation of a number of permanent arts and cultural commissions in and around the Olympic Park by a number of internationally renowned artists. These developments in particular have the potential to significantly raise the international profile of East London both as a place to visit and as a place to invest.

Research for London and Partners provides an indication of the expected tourism benefits from the Games. The net tourism gain to the UK economy of the Games is estimated to be £1.24 billion (at 2011 prices) for the period 2007-2017 once the various displacement effects have been accounted for. For London a net gain of £0.83 billion is estimated. The meta-evaluation survey of visitors to Olympic and Paralympic ticketed events and the International Passenger Survey will provide evidence on numbers of visitors and on how the Games have impacted on perceptions of the UK as a place to visit. There is also potential to analyse the impact of the Games on international perceptions of the UK using the Anholt Nations Brand Index. Evidence is expected later in 2012 on the outcomes of Games-related campaigns which are using the Games and the events around it as a means to promote the UK as a place to visit.

There is currently no evidence of the impacts of community engagement legacy activities on international profile and reputation, although some evidence may be provided by the evaluation of the Cultural Olympiad to the extent that it considers media coverage and visitor impacts (including visitors from overseas).

In sporting terms a successful Games can showcase not only the venues hosting Olympic events as potential host venues, but a range of other venues and facilities which the athletes, coaches and supporters have had access to, including for example the PGTCs. The number of major international sporting events taking place in the UK has undoubtedly increased as a result of London winning the right to host the 2012 Games, proving a strong indication that the UK's reputation abroad for hosting major sporting events has already been enhanced. The Olympic Park venues have already secured major international events post-Games, and discussions are underway regarding other potential events.

⁴⁶ Cushman and Wakefield (2005-2011). European Cities Monitor.

Section 9: Next steps

9.1 Meta-evaluation outputs

The interim evaluation sets out the available evidence of the impacts and legacy that has emerged from activity taking place primarily in the pre-Games period. It should be read in conjunction with the other meta-evaluation reports:

- Report 1: Research questions and scope (published June 2011);
- Report 2: Methods (published August 2011);
- Report 3: Baseline and counterfactual (published January 2012);
- Report 4: Interim or pre-Games evaluation (published November 2012);
- Report 5: Post-Games initial evaluation (to be published Summer 2013).

9.2 Next steps

This report sets out the impacts and legacy emerging from pre-Games legacy activity. It is limited by the data and evidence available and, more significantly, by the elapsed time available for legacy benefits, outcomes and impacts to have emerged and be realised.

Although some legacy benefits will not emerge for a significant number of years, the post-Games initial evaluation (Report 5), will provide an ideal opportunity to say more, and to go further in analysing the impact of the legacy of the 2012 Games. Report 5 will be published in Summer 2013 and include:

- More data and evaluation evidence of legacy effects;
- The legacy impacts of the Games themselves;
- Further discussion of outcomes and additionality, and the attribution of benefit to the Games;
- Assessment of the relevance and the quality of the evidence used within the report.

Report 5 will also provide a more complete picture of the legacy impacts within each theme. This will include, but not be limited to:

- A more detailed consideration of the factors associated with success in particular sports;
- An assessment of the impact of the 2012 Games on national pride, health and well-being;
- Analysis of visitor numbers and attendance at the Games and the associated economic impact;
- Further economic modelling covering the cost of staging the Games, the cost of post-Games transformation and other impacts such as tourism, inward investment, skills and East London regeneration;
- An estimate of the total number of volunteers engaged in Games-related activity;
- Analysis of the extent to which the Games have increased awareness and generated positive perceptions around disability and disabled people;
- Analysis of the impact of the Games on residential and commercial land values in East London and its subsequent impact on resident mobility;
- An assessment of the role of the Games in catalysing wider private and public investment in East London.

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