

Report 5: Post-Games Evaluation

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

RESEARCH QUESTIONS

For:
Department for Culture, Media & Sport

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Department for Children Schools and Families
Department for Communities and Local Government
Department for Culture, Media and Sport
Department for Education
Department for Environment, Food and Rural Affairs
Department for Work and Pensions
Department of Health
Economic and Social Research Council
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Government Olympic Executive
Greater London Authority
HM Treasury
Host Borough Unit
London Development Agency
London Legacy Development Corporation
London Organising Committee of the Olympic Games and Paralympic Games
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Join In
Kraft Foods
Land Prop
Lee Valley Regional Park Authority
Legacy Trust UK
Level Playing Field
London & Partners
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Local Government Association
London Legacy Development Corporation
London Organising Committee of the Olympic Games and Paralympic Games
London Travel Watch
McDonalds
National Children's Bureau
National Council for Voluntary Organisations

Northern Ireland Office
Office for Civil Society
Office for Disability Issues
Office for National Statistics
Olympic Delivery Authority
Parasport
Physical Activity Alliance
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Scope
Scottish Government
Skillset
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UK Trade and Investment
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Visit Britain
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1 Introduction

1.1 Background

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

In light of this commitment, the Department for Culture, Media & Sport (DCMS) commissioned a consortium led by Grant Thornton, including Ecorys, Loughborough University, Oxford Economics and Future Inclusion, to undertake a comprehensive and robust 'meta-evaluation' of the additionality, outputs, results, impacts and associated benefits of the investment in the 2012 Games. The consortium was supported by a team of independent academic peer reviewers – Beatriz Garcia (University of Liverpool), Iain Macrury (University of Bournemouth), Stefan Szymanski (University of Michigan) and Peter Wells (Sheffield Hallam University) – who provided a source of guidance, check and challenge through the course of the work, though did not formally sign-off the meta-evaluation reports.

This commission went beyond anything that has been done before in trying to understand the difference made by hosting an Olympic and Paralympic Games. It was driven by a real desire across Government to understand the impact of the Games and the role they have played in inspiring lasting change. Due to its innovative and boundary pushing nature, the Economic and Social Research Council (ESRC) part funded the project to enable it to make a contribution to advancing meta-evaluation methods.

Over a three year period the evaluation team worked closely with those involved in delivering the Games and its legacy, as well as those involved in researching its impact. This resulted in the creation of a comprehensive evidence base that enabled a robust assessment to be made of the success and impact of the Games in delivering a lasting legacy.

One year after the Games, and with legacy being thought about over at least a 10 year timeframe, there are obviously still many legacy benefits to emerge and impacts to be unpicked. However, what this work shows is that there is already much that can be said about how the Games have helped change places, organisations and individuals.

1.2 The structure of the meta-evaluation

The Government's plan for the meta-evaluation consists of four phases:

- Phase 1: Inception (March 2010 – April 2011);
- Phase 2: Baseline and pre-Games interim evaluation (February 2011 – Summer 2012);
- Phase 3: Post-Games evaluation (June 2012 – June 2013); and
- Phase 4: Longer-term evaluation of the impacts and legacy of the Games.

It is planned that Phase 4 of the work, looking at the longer-term impacts and legacy of the Games, will take place separately at a later date and cover the impacts up to 2020.

This report (Report 5) is the final report in a series of five reports, which cover phases 1 to 3 of the meta-evaluation:

- Report 1: Scope, research questions and data strategy;

- Report 2: Methods;
- Report 3: Baseline and counterfactual;
- Report 4: Pre-Games interim evaluation; and
- Report 5: Post-Games evaluation.

The work undertaken in Reports 1 to 4 was of critical importance in providing the foundations for this report by establishing – among other things – the research questions the study would answer, the approach and method taken to gathering the evidence and the context against which the impact of the legacy should be measured and evaluated. This report builds directly on these foundations and the early look at the impacts and legacy emerging from pre-Games activity that was covered in Report 4, to provide an overall assessment of the available evidence of the impacts and legacy up to the end of 2012.

1.3 Report 5

This report examines available evidence of the impacts and legacy that emerged from activity taking place in the pre-Games, Games-time and immediate post-Games period (up to the end of 2012). 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. It also incorporates outputs from a large programme of stakeholder consultation.

This report is therefore an initial assessment of the emerging legacy from the 2012 Games for each of four legacy themes (Sport, Economy, Community Engagement and Regeneration of East London), primarily setting out 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 over the medium and longer term.

1.4 Report structure

This report is in two parts: part 1 (this document) provides summative answers to the study's research questions; part 2 (provided separately in four documents) is the detailed evidence base that sits behind each of the four themes. Alongside these two parts there is also a separate, shorter summary report that provides an overview of the headline findings.

(i) Research questions report

The research questions report provides answers to each of the 81 research questions (see Annex A for a full list of the research questions) set out at the outset of the meta-evaluation, questions that drove the study's design and focus. The answers to these questions have been broken down into individual themes and sub-themes to aid navigation and so that the report can be read in full or as individual themes and sub-themes. For those under the latter approach, it is useful to first review the methodological approach set out in Chapter 2. The remainder of the report is structured as follows:

- Chapter 3 focuses on **harnessing the UK's passion for sport** looking in turn at the legacy effects on sports participation, sports infrastructure, elite sport and international sport.
- Chapter 4 focuses on **exploiting opportunities for economic growth** and covers the economic impact of the Games, business access to 2012 opportunities, promoting the UK as a place to invest, export and trade promotion, tourism, employability and skills development, promoting sustainable business and opportunities for disabled people in business and disabled access to transport.
- Chapter 5 focuses on **promoting community engagement and participation**, which includes an assessment of the legacy effects on volunteering and social action, participation in culture, engaging children and young people, encouraging sustainable living and influencing attitudes towards disabled people.

- Chapter 6 focuses on the extent to which the 2012 Games are **driving the regeneration of East London**, looking at how it has contributed to transforming place, transforming communities, transforming prospects and Convergence.
- Chapter 7 looks at the **lessons learned** about how to maximise the sporting, economic, community engagement and regeneration benefits from staging mega-events.
- The final chapter (Chapter 8) draws together the emerging findings as it provides a synthesised summary of the answers to the headline research questions, the cross cutting questions and the concluding questions.

(ii) Evidence bases (separate documents)

The second part of the report comprises four detailed evidence base documents, one for each theme. These documents provide a comprehensive overview and synthesis of all of the data and evidence available for answering each of the questions presented by the study. This includes both the evidence used to answer the research questions as well wider evidence, which while not necessarily relevant to a particular research question, is significant in terms of understanding the overall impacts and legacy of the Games. Again, to ease readability and to enable cross-referral between the two parts the thematic evidence base, documents are structured according to sub-theme.

2 Method

This chapter summarises the methodological approach taken in preparing and synthesising the evidence for both the research questions and evidence bases. It provides an overview of the approach, the process of gathering and synthesising the evidence and details of how the quality of the evidence has been assessed. The over-arching methodological approach to the meta-evaluation is set out in more detail in Reports 1 and 2.¹

2.1 Overview of the approach

Figure 2-1 provides an illustration of the methodological approach adopted for this post-Games evaluation. As can be seen from the diagram (working from left to right and as noted in the introduction), the analysis and reporting has been structured by the four legacy themes and then further broken down by legacy sub-themes. This headline structure guided all of the meta-evaluation team's work.

For each sub-theme the available evidence has been analysed by 'type', with three broad types of evidence used:

- Output and expenditure data;²
- Evaluation and other research evidence; and
- Primary research (including a comprehensive programme of stakeholder consultation).

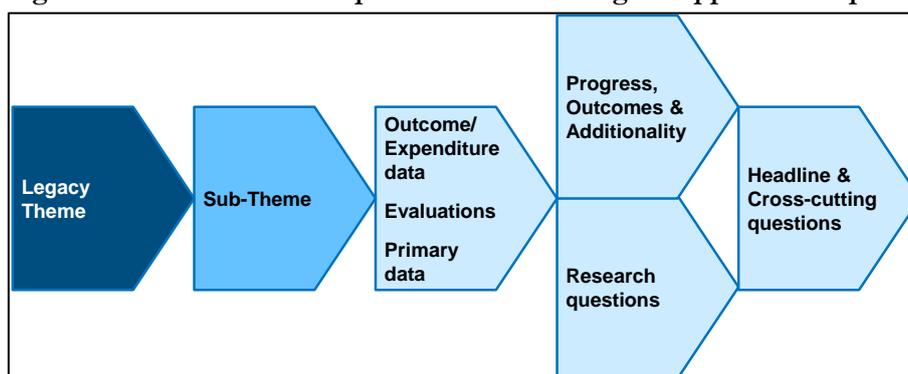
In undertaking the analysis and synthesis, the differences between the different types of evidence and data was considered. The chosen approach has been to analyse parallel forms of evidence separately. This helped to avoid any confusion that may have been created by attempting to synthesise different types of evidence. The amount and type of evidence available differs within themes and sub-themes.

With the evidence analysed separately by type, the next step was to triangulate and to synthesise the evidence in order to draw some conclusion around both legacy progress, outcomes and additionality; and to provide answers to the research questions.

¹ See <https://www.gov.uk/government/organisations/department-for-culture-media-sport/series/london-2012-meta-evaluation>

² The Department for Culture, Media & Sport formally wrote to the Public Accounts Committee in December 2012 and explained that the final meta-evaluation publication would provide an assessment of individual Games legacy programmes that fall outside of the Public Sector Funding Package. The tables in Annex B show the coverage of the costs highlighted in the NAO's Post-Games Review of December 2012.

Figure 2-1: Illustrative example of the methodological approach adopted



2.2 Gathering the evidence

The intention from the outset of the meta-evaluation was that it would draw primarily on evaluation evidence, although some resource was allocated to help fill gaps in the available data. 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. The process for collecting this data was primarily facilitated through the Evaluation Steering Group whose members include the different organisations and stakeholders largely responsible for the delivery of the 2012 legacy in London and across the nations and regions. If an organisation was not a member of the steering group it was followed up bi-laterally. In order to ensure consistency of data returns a template was provided by the meta-evaluation team;
- **Evaluation and research evidence:** This can broadly be broken down into two types of evidence:
 - **Evaluation evidence:** Throughout the lifetime of the meta-evaluation, evaluations of 2012 legacy activities have been tracked which has provided the meta-evaluation team with an understanding of what is likely to be available and when. As such, where evaluation evidence has become available (either interim or final) this has been collected. This has also been supplemented by a similar process of identification, tracking and collection with regard to wider academic research related to the 2012 Games and its legacy;
 - **Primary research:** In a further attempt to reduce gaps in the evidence base a range of primary research was undertaken according to priorities agreed with DCMS. This generally took three forms: it was undertaken directly by the meta-evaluation team; DCMS commissioned specific surveys; or DCMS or the meta-evaluation team worked with an organisation willing to either do the work or to adapt their existing work to assist in filling the gap.

Case studies of legacy programmes, regional impacts and other activities are also presented throughout the report to provide further details of the outputs and impacts.

The specific sources of evidence used in the analysis are identified within each chapter.

2.3 Synthesising the evidence

The synthesis of evidence has occurred at a number of levels:

1. Synthesis of findings for each sub-theme;
2. Synthesis of findings to help answer individual research questions;
3. 'Synthesis of the syntheses' to answer the headline research questions; and

4. 'Synthesis of the syntheses' to answer the cross cutting and study conclusion questions.

The synthesis required for point 1 was relatively straightforward. Focusing on higher level inferences and interactions between the different evidence types, the different sources were drawn together and commented on in terms of what the evidence was inferring around the progress being made and the overall direction of travel; the outcomes achieved; and the additionality of the Games in driving both of these. In order to robustly comment on outcomes and additionality, the baselines and counterfactuals described in Report 3 of the meta-evaluation have been drawn on heavily.³ In reading this report a general rule of thumb that can be adopted is that unless stated otherwise the projects, activities and investments reported can be assumed to be additional and delivered as a direct result of the 2012 Games.

The synthesis required for points 2, 3 and 4 was more complex as they required evidence to be drawn from across a number of sub-themes (in the case of point 2 and 3) and across themes (in the case of point 4). To do this, a matrix was used to collate and exchange information between the different sub-themes and themes.

2.4 Assessing evaluation quality

The ESRC has part funded this project to enable it to make a contribution to:

- Develop an improved understanding of the definition and practice of meta-evaluation;
- Apply this learning to the Meta-Evaluation of the 2012 Games, in support of a rigorous and systematic approach towards identifying, appraising and synthesising the evidence; and
- Generate learning and lessons for the wider research community, and help advance meta-evaluation practice and future evaluations of mega events.

A small research team led by Ecorys and comprising academic specialists from the Institute of Education, the University of Cardiff and the University of Birmingham have worked closely with the members of the meta-evaluation team throughout the study to deliver these aims. A literature review was undertaken to explore the rationale for meta evaluation and relevant methods, and to identify transferable lessons from practitioners of meta evaluation. This was published alongside the interim meta evaluation report.⁴ In this report it was identified that the meta evaluation of the 2012 games constitutes the synthesis form of meta evaluation, and therefore requires a set of clear and transparent criteria to help identify and appraise evidence for inclusion.

In response to this need, detailed guidance on research synthesis along with an evidence appraisal tool were developed by the team. This tool was piloted using contrasting evaluations and reports, and then discussed and refined through a series of team workshops.

The final evidence appraisal tool provides a flexible, yet systematic, framework for undertaking assessment of the broad range of evaluation and other data to be analysed by the meta-evaluation team. The tool has enabled team members to not only interrogate the evidence base in terms of generic standards of quality and reliability, but also in terms of specific criteria of relevance to the meta-evaluation research questions. Each significant piece of evidence, for each theme, was assessed and graded by a team's thematic lead, driven by the specific needs of each thematic logic model and accompanying evaluation framework.⁵

The results were then summarised and synthesised at the sub-theme level in order to help assess the 'weight of evidence' as to whether the Games and legacy initiatives have delivered on

³ Report 3 set out in some detail the baseline and counterfactual position for each of the four legacy themes and in doing so provided the overall context against which the impact (to date) of legacy initiatives could be measured and evaluated.

⁴ See *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Developing Methods Paper* (November 2012). Available at <https://www.gov.uk/government/publications/meta-evaluation-of-the-impacts-and-legacy-of-the-london-2012-olympic-games-and-paralympic-games-developing-methods-paper>

⁵ Reports 1 and 2 set out in some detail the logic models and accompanying theories of change and evaluation frameworks developed for each theme of the meta-evaluation themes.

their expected benefits, alongside more generic analysis of the direction of travel. For example, even if individually or collectively the quantitative, qualitative or mixed-methods evaluation evidence were to suggest that Games-related trends are moving in a positive direction, these results may not be credible due to issues with the evidence quality or relevance. Where this has been the case, this has been reported accordingly. Equally, the collective evidence might appear contradictory, but with systematic strengths or weaknesses identified it is possible to 'weight' the evidence appropriately.

Use of the appraisal tool and 'weight of evidence' assessments has allowed the team to undertake a more systematic and rounded assessment of each research question, helping to minimise bias in the process. It has also helped to identify major gaps or weaknesses in the evidence base which would benefit from future research. The meta evaluation tools and guidance developed through the ESRC funded project are being compiled in the final Developing Meta-Evaluation Methods paper, which will be published separately to this report.

3 Harnessing the UK's Passion for Sport

3.1 Introduction

The Government has made a commitment to "*harnessing the United Kingdom's passion for sport to increase school-based and grass roots participation in competitive sport – and to encourage the whole population to be more physically active*".⁶ Priorities include:

- Bringing back a culture of competitive sport in schools;
- Boosting participation in grass roots sport;
- Increasing participation in wider physical activity;
- Supporting elite athletes; and
- Using the power of the Games to give young people around the world access to sporting opportunities.

This has resulted in the following overarching sport legacy objectives:

- Increasing sport and physical activity participation;
- Providing the infrastructure, in terms of facilities, sports volunteering and sports coaching, to support and sustain increased participation; and
- Developing and sustaining a world class high performance system.

Based on the Government's priorities indicated above the meta-evaluation for the sport theme is grouped into the following sub-themes:

- Participation: with a focus on sport and physical activity participation;
- Infrastructure: covering the 2012 Games facilities, access to facilities, club membership, sports volunteering and sports coaching;
- Elite: covering medals performance, athlete development, elite coaching and hosting major events; and
- International: based mainly on the International Inspiration programme.⁷

⁶ Hansard, Written Ministerial Statement by The Secretary of State for Culture, Olympics, Media and Sport on the Olympic and Paralympic Games Legacy, 20th December 2010.

⁷ International Inspiration aimed to bring into reality the 'Singapore Vision', i.e. 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*". The aspiration is to reach 12 million children in 20 countries through the power of high quality and inclusive physical education, sport and play.

Participation

3.2 To what extent and in what ways have the 2012 Games contributed to increased participation in sport and physical activity amongst adults, including disabled adults in the UK (before and during the Games)?

Increasing the participation of adults, including disabled adults, in sport and physical activity was and remains a key legacy promise, with significant funding committed to programmes and initiatives to facilitate and sustain this increase.

Taking Part survey and Active People survey data indicates that since 2009/10 adult participation has increased after several years of flat growth, with the highest levels of participation recorded in the period between January and December 2012.

Although it is difficult to determine the exact extent to which the Games has contributed to this increase in participation, evidence from a range of legacy programmes, including Places People Play, Inspire, Walk 4 Life and Free Swimming as well as investment in facilities including the Olympic venues and those hosting Pre-Games Training Camps (PGTCs) indicates that significant participation opportunities have been provided as a result of the Games. Furthermore, through the funding and focus provided by the Whole Sport Plans, National Governing Bodies (NGBs) have provided participation opportunities and infrastructure to capture and build on the interest generated by the Games. There are also indications that some sport participation is being sustained.

In addition, data from Taking Part indicates that the Games has motivated people to participate in sport, with the highest level noted in 2012. This is further supported by data from local authorities which indicates an increase in facility usage during and after the Games. Therefore, it can be concluded that because the Games have motivated people to do more sport and because the legacy programmes have provided a range of participation opportunities that the Games are likely to have contributed to the increase in participation.

In order to unpack this finding in more detail, the answer to this research question begins by exploring the growth in participation in more detail. Before moving on to look at the extent to which the Games may have contributed to this increase both in terms of motivational effects and the provision of participation opportunities.

Data on disability is only highlighted in this section and discussed fully in section 3.5.

(i) Participation trends

Both the adult participation surveys, Taking Part and Active People, show statistically significant⁸ increases in sports participation in the last few years.

The Taking Part survey results for the January to December 2012 period⁹ (Figure 3-1) show statistically significant increases in the proportion of adults participating in:

- Active sport in the last four weeks increased from 53.7% in 2005/6 to 57.4%;
- At least 1x30 minute sessions of moderate intensity sport (including recreational walking and cycling) in the last week increased from 41.2% in 2005/6 to 44.7%; and
- At least 3x30 minute sessions of moderate intensity sport (including recreational walking and cycling) in the last week increased from 23.2% in 2005/6 to 26.5%.

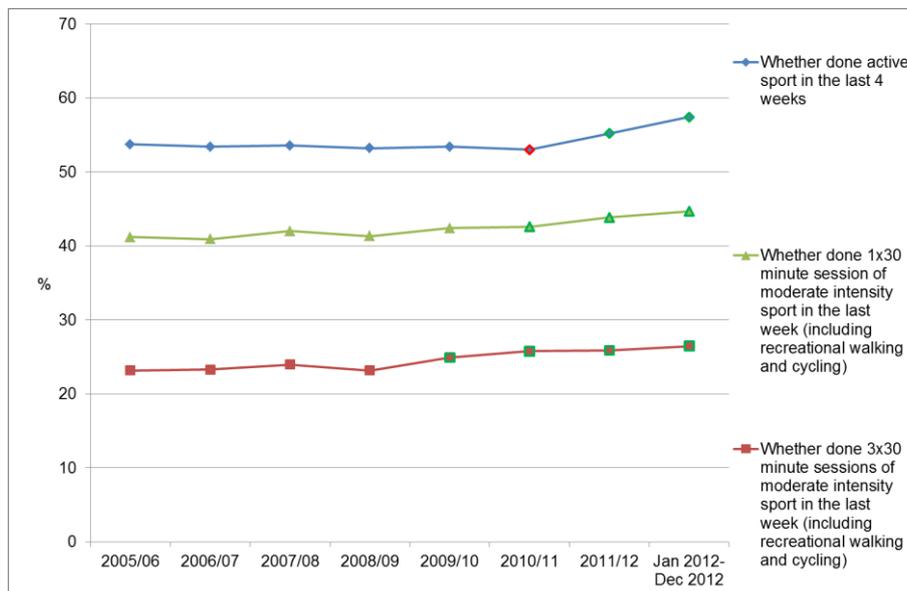
The 3.5% rise in the 1x30 minute session of moderate intensity sport (including recreational walking and cycling) in the last week measure, from 2005/06 to January to December 2012, is equivalent to 1.5 million more adults participants. This excludes the effects of population

⁸ At the 95% confidence level

⁹ Data for Taking Part is reported annually for the April to March period although is available on a quarterly rolling annual basis. The latest available Taking Part data is from January to December 2012 and is analysed, as this presents the latest data and includes the post-Games period.

growth between 2005/06 and January to December 2012 which would have led to a higher number of participants even without an increase in the percentage participating.

Figure 3-1: Frequency of adult participation in sport in England, 2005/06-January to December 2012



Source: Taking Part

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

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

Active People survey supports these findings with a statistically significant increase in its headline 1x30 minute session of moderate intensity sport¹⁰ from 34.2% in October 2005-October 2006 to 36.0% in October 2011-October 2012.

In terms of demographic trends (based on January to December 2012 data)¹¹, the following statistically significant points can be noted:

- **Gender:** Participation by men increased to 49.9% in 2012, up from 46.0% in 2005/6 while for women it increased from 36.6% in 2005/6 to 39.8% in 2012;
- **Age:** There is a clear correlation between age and adult participation levels, with participation rates decreasing as age increases. There has however been a statistically significant increase in all ages groups, except for age 16-24 (which is discussed further in section 3.3), since 2005/06;
- **Ethnicity:** Participation by white people peaked at 44.7% in 2012, a statistically significant increase from 41.4% in 2005/6. Participation of black or minority ethnic (BME) groups reached approximately the same level (44.6%) in 2012 showing a statistically significant¹² increase from 39.5% in 2005/6;
- **Socio-economic status:** Participation amongst upper socio-economic groups (upper SECs) is greater than that of lower socio-economic groups (lower SECs). Participation of both groups peaked in the January to December 2012 period at 49% (for upper) and 34.9% (for

¹⁰ This excludes recreational walking and cycling and so is lower than the taking part measure.

¹¹ Figures are the 1x30 minute session of moderate intensity sport measure from Taking Part unless Active People is stated.

¹² At the 90% confidence level, rather than the 95% confidence level used elsewhere. However, given the smaller sample sizes for BME groups the 90% level was deemed appropriate here.

lower), with both of these reflecting statistically significant increases since 2005/06, up from 46.7% for upper and 30.7% for lower SECs;

- **Employment:** Participation for those not working reached 33% in the January to December 2012 period up statistically significantly from 28.9% in 2005/6. Those working demonstrated a higher rate of participation at 52.7% showing a statistically significant increase from 49.3% in 2005/6;
- **Disability:** After remaining static from 2005/6 to 2009/10, participation by those with a long-standing illness or disability has steadily risen. Participation peaked in the January to December 2012 period at 29.3%, a statistically significant increase since 2005/06 (25.1%);
- **Region:** Active People shows the South East and London have had the highest participation rates. The lowest level of participation is in the West Midlands. All regions have however shown a statistically significant increase in participation between October 2005 – October 2006 and October 2011 – October 2012;
- **Sport:** Active People shows participation in athletics (including running), cycling, netball, boxing and table tennis has grown statistically significantly between October 2007 – 2008 and October 2011 – October 2012 with all other sports showing no change or a decrease.

Econometric research¹³ on sport participation based on monthly Taking Part survey data indicates that in the run up to London 2012 and since the Beijing Games in 2008, there was an increase in participation of those doing sport most intensely. However, in the year 2012, 1.5% more adults were participating in at least one 30-minute session of moderate intensity sport, including recreational walking and cycling, which indicates an increase in the population participating in sport.¹⁴

As was noted within the individual demographic subgroups discussed above, this research also found that increases in participation were the largest for those from London and those of an ethnic minority, although the smaller sample sizes suggest this is treated with caution.

The data demonstrates that after remaining static between 2005/06 and 2009/10, in the run up to the Games there is a statistically significant increase in participation in sport and that this is felt across most demographics.

This trend data needs to be viewed within the wider contextual factors which impact on sport participation, such as the weather, economic conditions and personal circumstances (e.g. income levels). Poor weather, especially freezing conditions, and tough economic conditions have been shown to negatively impact participation¹⁵, with income and works status positively correlated with participation.¹⁶ According to the Active People survey, over 30% of those doing less sport in 2011 indicated that this was due to work, redundancy or economic concerns.

In light of the difficult economic condition over recent years and periods of poor weather, increases in participation can be seen as a further positive pointer towards the impact of the Games.

(ii) Impact of legacy programmes, initiatives and investment

As a result of London hosting the 2012 Games, there has been significant investment in programmes and infrastructure, both facilities and soft infrastructure, to facilitate and sustain an increase in participation. Through the funding and focus provided by the Whole Sport Plans, NGBs have provided participation opportunities and infrastructure to capture and build on the

¹³ Dr. Paul Downward, Dr. Peter Dawson and Professor Terrence Mills (2013) *The Impact of the Olympic Games on Sport Participation, Motivation, Health and Well-Being* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex D*)

¹⁴ Although on its own this does not prove an Olympic and Paralympic effect, when taken together with the other evidence presented in this report on participation opportunities and motivation, it does provide a strong link between participation and the Games

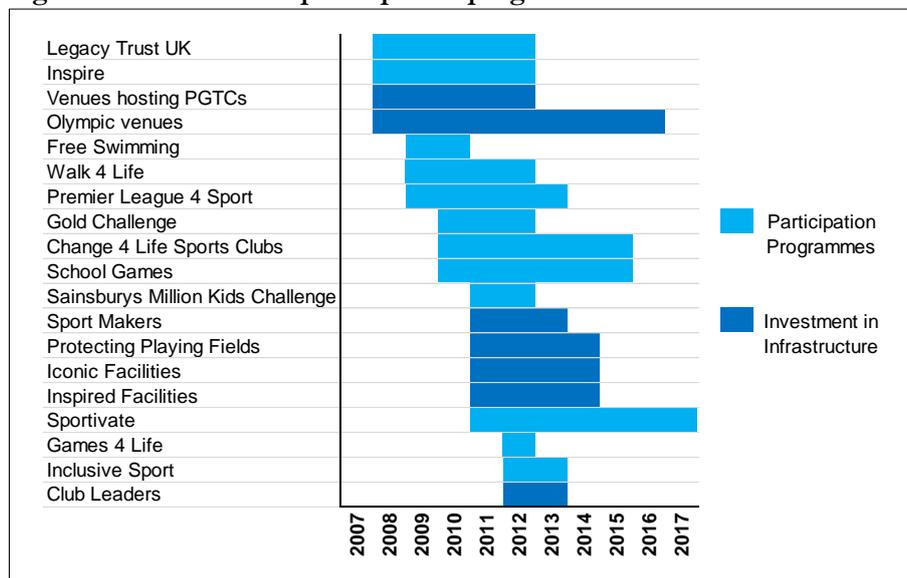
¹⁵ Sport England

¹⁶ Source: Stakeholder feedback

interest generated by the Games, with indications that some sport participation is being sustained.

Sport participation levels increased from 2009/10 onwards, and with much of the legacy investment in participation taking place between 2008 and 2012 (Figure 3-2), this can be seen to further indicate the Games' contributed to an increase in participation.

Figure 3-2: Timeline of participation programmes and investment



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

Note: The timeline above includes all programmes related to participation (including both adults and children/young people) Although this research question relates to adult participation, the full selection of programmes is included for completeness.

Figure 3-3 provides an indication of the participation opportunities created through legacy investment.

Figure 3-3: Participation opportunities created by legacy programmes and investment

Programme/ Investment	Timing	Outputs
Participation Programmes		
Free Swimming	2009-2010	9.53 million swims – 24% additionality estimated
Gold Challenge	2010-2012	105,000 participants
Inspire	2008-2012	2,7000 projects with 81% of participants involved in sport and physical activity projects
Legacy Trust UK	2008-2012	16 programmes with more than 100 projects (art, sport and culture)
Walk 4 Life	2009-2012	79,400 walks
Infrastructure Investment		
Club Leaders	2012-2013	1,000 clubs registered
Iconic Facilities	2011-2014	495,161 average annual throughput estimate per project (years 1-5)
Inspired Facilities	2011-2014	18,029 average annual throughput estimate per project (years 1-5)
Protected Playing Fields	2011-2014	10,518 average annual throughput estimate per project (years 1-5)
Olympic venues	2013-2016	1.45 million participation visits (excluding the Stadium) per year by 2016
Sport Makers	2011-2013	17,174 Sport Makers deployed for more than 10 hours
Venues hosting PGTCs	2008-2012	76% of PGTC Survey respondents indicated a positive impact on participation

Source: Sport England, London 2012 Olympic Games and Paralympic Games Inspire Programme legacy survey: United Kingdom, Walk 4 Life Miles Project, Walk England, October 2012, DCMS, Legacy Trust UK website, Pre-Games Training Camp Survey (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Games and Paralympic Games Sport Evidence Base Annex C)

Four legacy participation programmes in particular created significant participation opportunities: Gold Challenge, Inspire, Walk 4 Life and Free Swimming. Along with investment in infrastructure which as noted also impacting participation through the provision of facilities and soft infrastructure to support this.

Participation Programmes

Based on available data, legacy participation programmes resulted in thousands of projects providing participation opportunities for hundreds of thousands of people:

- **Gold Challenge:** Part of Sport England's Places People Play, Gold Challenge provided participation opportunities to 105,000 people in multiple Olympic and Paralympic sports throughout England. The programme, which intended to get people involved in multiple Olympic and Paralympic sports and in doing so raise money for charity, ended in December 2012.
- **Inspire:** Launched in April 2008, Inspire has resulted in over 2,700 projects inspired by the 2012 Games, creating opportunities for millions of people to get involved in activities spanning sport, education, culture, volunteering and sustainability and in doing so to feel part of the Games. These projects have taken place across the nations and regions of the UK.¹⁷ 80.9% of people were involved in sport and physical activity projects.

Based on a survey of participants¹⁸, it would appear that Inspire has positively impacted sport and physical activity participation with frequency of participation increasing after taking part in Inspire.

Prior to their involvement in the programme 69.1% of respondents had taken part in sport and physical activity at least once a week rising to 78.0% after involvement. The largest increase was in the percentage of people who, after taking part in the programme, went on to participate in sport and physical activity more than once a week, which increased from 42.8% to 52.9% an increase of 10.1% points. There was also a reduction in the percentage of programme participants who, following Inspire, rarely/ never take part in sport from 8.6% to 3.2%. Women (+11.5%) were more likely than men (+7.5%) to increase the frequency of their sports participation to several times a week as a result of the programme.

- **Walk4Life:** As part of the Change 4 Life Campaign, Walk 4 Life aims to encourage people who are inactive, or who do very little physical activity, to walk more to improve their health. An evaluation of the initiative indicated 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 after registration, thus indicating that participation has increased and is being sustained.
- **Free Swimming:** The Free Swimming Programme was a £140 million programme designed to increase participation in swimming in England, with local authorities providing free swimming for children aged 16 or under and for adults aged 60 or over. Although now stopped, over the course of the 16-month period in which Free Swimming ran, 9.53 million swims were recorded for the 60 and over age group. Assessment of the impact on the level of physical activity undertaken by those who had participated in free swimming was positive. Amongst those free swimmers aged 60 and over, the proportion of survey respondents who undertook at least 30 minutes of activity a day increased from 66.2% before the start of the initiative to 78.4% after the initiative was introduced. The increase in activity levels amongst these respondents could not be entirely attributable to Free Swimming but it was concluded

¹⁷ *Inspire Programme – Key Facts & Figures*

¹⁸ Knight, Kavanagh and Page (February 2013) *London 2012 Olympic Games and Paralympic Games Inspire programme legacy survey*

that it is likely that some of it was. However, a lack of overall additionality ultimately contributed to the programme being cancelled.

Infrastructure

There has been significant investment in infrastructure, both physical and soft infrastructure, which has contributed to participation increases. Infrastructure is discussed in further detail in section 3.10 with the key participation opportunities highlighted below.

Olympic Park Venues

Due to open from Summer 2013, the Olympic Park sporting venues are expected to cater for three to four million visitors in 2016, with high levels of community usage. Community usage is expected to be at least 96% of the 1.45 million participation visits to the venues (excluding the stadium) with high performance sport training or competition accounting for at least 58,600 visits per annum.

Places People Play

Investment in the Places People Play facilities is linked to participation with the awarded projects expected to create significant participation opportunities, as detailed in Figure 3-4.

Figure 3-4: Participation estimates for Inspired Facilities, Iconic Facilities and Protecting Playing Fields (per project over the 5 years after the works are completed)

Programme	Average annual throughput* estimate per project (years 1-5)	Average annual participants estimate per project (years 1-5)
Iconic Facilities	495,161	13,696
Inspired Facilities	18,029	n/a
Protecting Playing Fields	10,518	n/a

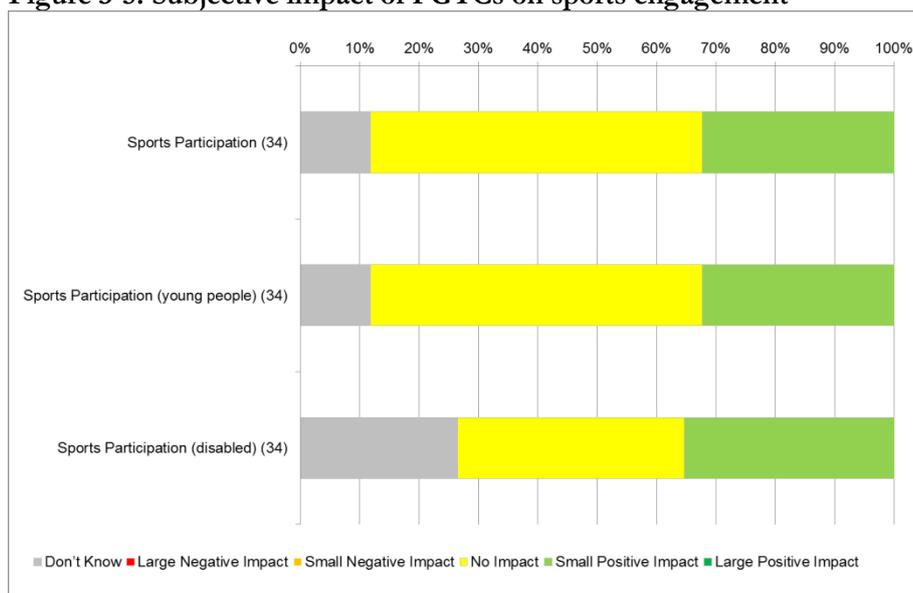
Source: Sport England, based on application data

Note: * Throughput refers to the number of visits (so the same participant can be included multiple times).

Pre-Games Training Camps

A survey of Pre-Games Training Camps (PGTCs)¹⁹ revealed that the PGTCs and their associated events have impacted sport participation (Figure 3-5), with 76% indicating the PGTCs had a positive impact on participation and 53% indicating the PGTCs had a positive impact on the participation of disabled people.

¹⁹ A survey was conducted with venues hosting PGTCs to determine their views as to the impact of the Games. Findings are detailed in DCMS (2013) Pre-Games Training Camp Survey (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Games and Paralympic Games Sport Evidence Base Annex C*)

Figure 3-5: Subjective impact of PGTCs on sports engagement

Source: Pre-Games Training Camps Survey (Meta-Evaluation of the Impacts and Legacy of the London 2012 Games and Paralympic Games Sport Evidence Base Annex C)

Note: Number of responses shown in brackets.

The investment in the PGTC venues, Places People Play, Olympic Park and out of London venues as well as softer infrastructure should continue to support participation going forward.

Future Investment and Policy Change

From a policy perspective, there is an increasing focus on women in sport.

Following the good performance of Team GB's female athletes during the Games, raising the profile of women's sport has become a priority for the Department for Culture, Media & Sport, with: additional investment to boost female participation allocated; a programme of work to identify and encourage talented women to apply for Board positions in sport developed; and closer alignment with the media to raise the profile of women's sport.

In terms of Sport England investment, nearly all of the organisation's funding programmes benefit women and girls (as well as men and boys); however, the following funding streams are solely dedicated to supporting women's participation:

- **Active Women:** In January 2011 Sport England announced that 20 sports projects would benefit from a £10 Million National Lottery fund to encourage Active Women and tackle the gender gap in sport. The investment supports projects to get more women from disadvantaged communities and women caring for children playing sport as part of the drive to deliver a mass participation legacy from London 2012; and
- **Bury Pilot:** In May 2013 Sport England announced Bury as the location for an intensive year-long sporting experiment to get more women and girls active and tackle the gender gap in sport. Bury Council has secured up to £1.8 million of National Lottery funding from Sport England to rigorously test what works in changing the sporting habits of women and girls.

In addition to these investments, there is on-going investment in infrastructure, for example the facility strands of Places People Play as well as soft infrastructure, like Sport Makers, which will facilitate and support increasing sport participation in the future.

(iii) Impact of the Games

There is much debate as to the "demonstration effect"²⁰ of the Olympic Games. According to research by Sport England, about a quarter of the sporting population are highly responsive to the demonstration effect of major events although there is a challenge to capitalise on the opportunity provided²¹. The evidence presented below explores the extent to which the 2012 Games have contributed to increased participation in sport and physical activity amongst adults.

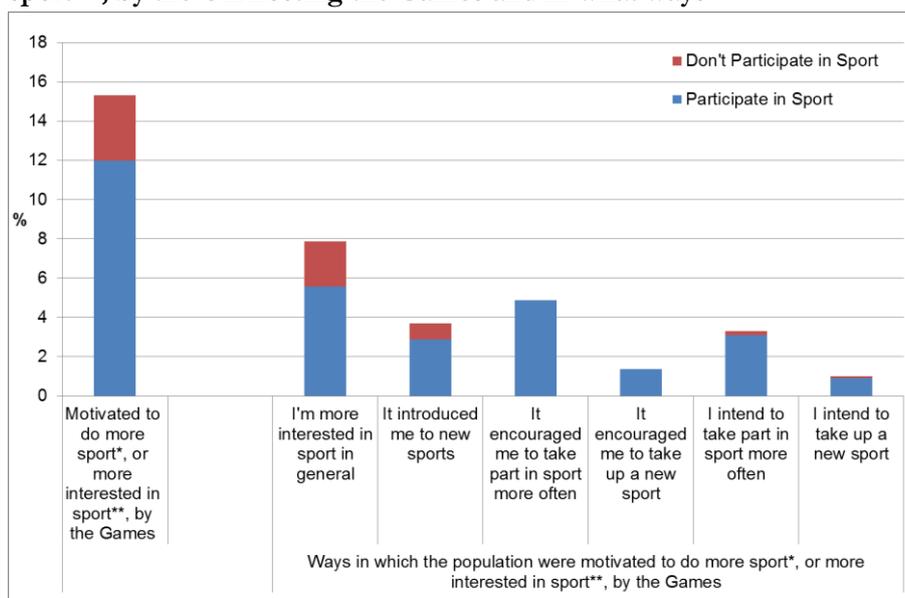
Taking Part

According to the Taking Part survey for the 2012 calendar year, 15.3% of adults were either motivated to do more sport or more interested sport because of the UK winning the bid to host the Games:

- 12.0% of adults have been motivated to do more sport (16.0% of those participating in sport); and
- 3.3% of adults that have become more interested in sport (13.3% of those not participating in sport) (Figure 3-6).

Figure 3-6 shows that 4.9% of the population have been encouraged to take part in sport more often, 1.4% have been encouraged to take up a new sport, 3.3% intend to take part in sport more often and 1.0% intend to take up a new sport.

Figure 3-6: Percentage of adults motivated to do more sport*, or more interested in sport, by the UK hosting the Games and in what ways**



Source: Taking Part

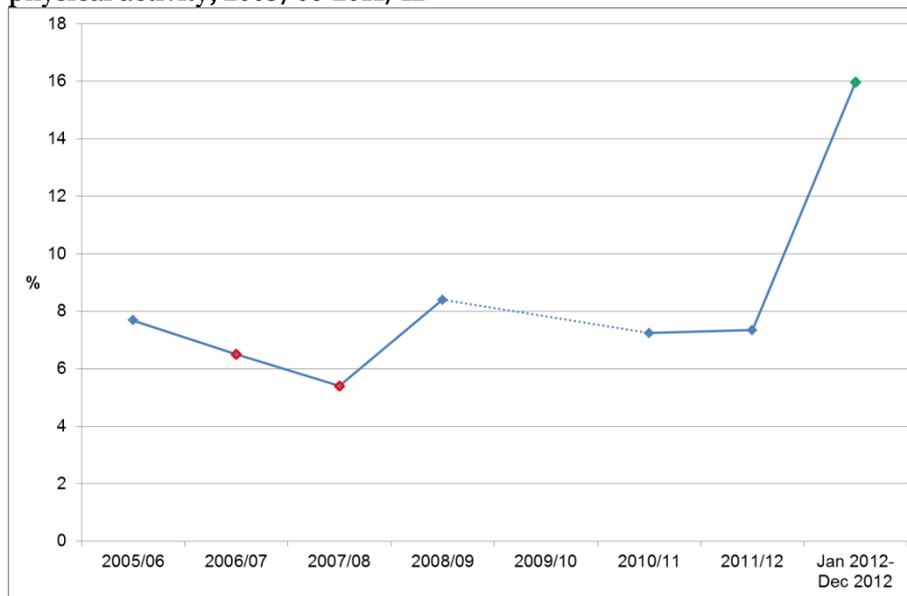
Note: * asked to those that participate in sport, ** asked to those that do not participate in sport

Motivation to do sport as a result of the Games has increased since 2005/6. In 2005/06 motivation to do sport or physical activity as a result of winning the right to host the Games was 7.7%, falling to 5.4% in 2007/08 and increasing to 8.4% in 2008/09. Since 2010/11 the motivation to do sport appears to have stabilised at around 7.3% with a spike to 16.0% in the January to December 2012 period. This peak is a statistically significant increase from 2005/06 (8.3%) (Figure 3-7).

²⁰ Demonstration effects are effects on the behaviour of individuals caused by observation of the actions of others and their consequences – for sport this would be increasing sport participation as a result of watching a mega-event, like the Games.

²¹ Sport England (October 2012) *Insight summary*

Figure 3-7: Percentage of those adults participating in sport who felt the UK winning the bid to host the 2012 Olympics motivated them to do more sport or recreational physical activity, 2005/06-2011/12



Source: *Taking Part*

Note: Question not asked in 2009/10.

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

Motivation for those aged 16-24, black and minority ethnic (BME) groups and Londoners was statistically significantly higher than the national average, while those 45 and up, whites, those with limiting disability and those from the North East and North West were statistically significantly less motivated by the Games overall.

Econometric research²² indicates that when analysing the motivational effect of the Olympic and Paralympic Games over time, the largest impact was during the London Games. However there was also a noticeable effect in the year 2012, as well as when looking at the 2008 and 2012 Olympics combined.

When looking at the subgroups, the greatest effect is during the year 2012 rather than the Games themselves, with the exception of the London subgroup, on whom the Games had a particularly large motivational effect during the Games. This suggests that whilst there was some national effect throughout the year, proximity to the Games had a larger motivational effect at the time of the Games.

Local Government Association Research

The evidence from *Taking Part* around the role of the Games as a motivator for increased sport participation is also supported by research from the Local Government Association (LGA).

According to surveys conducted with councils in 2012 both during and after the Games, 44% indicated an increase in users of sporting and leisure facilities in summer 2012 (as compared with summer 2011), with 72% reporting an increase in users in quarter 3 of 2012/13 (as compared with 2011/12). A third of councils also reported increases in the number of disabled users, while only 2% reported a decrease (Figure 3-8).

²² Dr. Paul Downward, Dr. Peter Dawson and Professor Terrence Mills (2013) *The Impact of the Olympic Games on Sport Participation, Motivation, Health and Well-Being* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex D*)

Figure 3-8: Percentage change in users accessing council leisure facilities

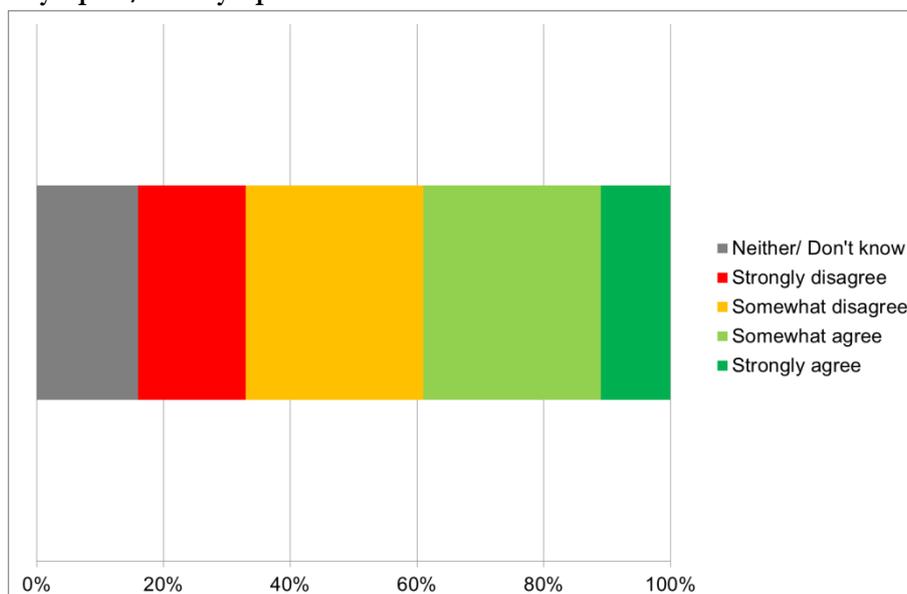
Increase or decrease in number of users	Summer 2012 vs Summer 2011	3 rd Quarter 2012/13 vs 3 rd Quarter 2011/12	
		Total	Disabled
A large increase in the number of users	5%	19 %	5 %
A small increase in the number of users	39%	53 %	28 %
Numbers of users have remained the same	30%	11 %	40 %
A small decrease in the number of users	4%	7 %	2 %
Large decrease in the number of users	0%	1 %	0 %
Don't know	22%	9 %	25 %

Source: Local Government Association

Usage of sport facilities that host Olympic and Paralympic sports saw the greatest increases in users of 50% or more, including cycling/BMX tracks, athletic tracks, beach volleyball, handball and swimming pool/ water polo. This is further supported by UK Sport's Sporting Preferences survey.

UK Sport's Sporting Preferences

UK Sport's Sporting Preferences survey is conducted with adults before and after the Games each year in which the Games takes place. According to the 2012 post-Games survey, 39% of respondents indicated they had felt inspired to do sport or recreational physical activity more frequently as a result of attending or watching the 2012 Games (Figure 3-9).

Figure 3-9: Percentage of adults that felt inspired to do sport or recreational physical activity more frequently than they normally do as a result of attending or watching the Olympics/ Paralympics

Source: UK Sport Sporting Preferences 2012

For those inspired to do sport or recreational activity more frequently:

- 47% (or 18% of the total sample) indicated that this was in sport or recreational physical activity generally;
- 36% (14% of the total sample) indicated that this was in a sport in which they already participate;
- 18% (7% of the total sample) indicated that this was in a new sport; and
- 58% (23% of the total sample) indicated that this was in sport or recreational activity generally, a sport in which they already participate or in a new sport).

NGBs also reported participation impacts which were attributed to the Games.

National Governing Bodies

NGBs consulted²³ indicated that the Games increased interest and participation in their sports, as evidenced by hits on NGB websites, number of new club members and interest at events. When asked what the impact of the 2012 Games on their sport has been, 84% of NGB respondents indicated that there had been an increase (significant increase or increase) in participation (discussed in more detail in section 3.2). Games-inspired events for sailing and hockey also generated participation opportunities as follows:

- Sailing's Sail for Gold had over 3,000 people 'have a go' at sailing or windsurfing in Weymouth at the free Sports Arena during Olympic and Paralympic sailing events. There was a 50% uplift in traffic to 'Where's My Nearest' section of the website; and
- The Hockey Nation programme (which included a wide range of activities that looked to maximise the potential of the Olympic Games as a catalyst for greater participation in hockey) resulted in 30,000 young people and adults trying hockey on the Hockey Nation pitches in the holding pen at the Olympic Park, most of whom weren't existing hockey players.

(iv) Conclusion

Adult participation in sport and physical activity has increased in the run up to, and since the Games. Adult participation in 2012 is up 3.5 percentage points on 2005/6 (based on 1x30 minute sessions of moderate intensity sport (including recreational cycling and walking) in the last week). Taking the broad range of evidence together, it is clear that the Games has contributed to this increase in participation with investment in sport participation programmes and infrastructure (facilities and people) generating significant participation opportunities. In addition, the Games has acted as a motivator for participation, with 15.3% of the population in the January to December 2012 period either motivated to do more sport or more interested in sport because of the UK hosting the Games.

Given that the economy, weather and other factors like income levels, have been shown to impact on participation (with poor economic performance, bad weather and lower income levels negatively affecting participation), the statistically significant increase in participation experienced in a tough economic environment with often bad weather adds further weight to the evidence that increases in participation have been facilitated, at least in part, by the Games and Games-related investment in programmes and facilities.

From a policy perspective, there is an increasing focus on women including additional investment to boost female participation, a programme of work to identify and encourage talented women to apply for Board positions in sport, and closer alignment with the media to raise the profile of women's sport.

This investment, together with on-going investment in participation programmes and infrastructure, for example the facility strands of Places People Play as well as soft infrastructure, like Sport Makers, will facilitate and support increasing sport participation in the future.

3.3 To what extent and in what ways have the 2012 Games contributed to increased participation in sport and physical activity amongst young people, including young disabled people in the UK (before and during the Games)?

Increasing the participation of young people has been a focus of the Games legacy. In seeking to answer this question in more detail, this answer splits young people into children (aged 5 to 15) and young adults (aged 16 to 24).

²³ A survey and interviews were conducted with NGBs to determine their views as to the impact of the Games on their sport. Findings are detailed in Grant Thornton (2013) *National Governing Body Research Report* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Games and Paralympic Games Sport Evidence Base Annex B*)

Taking Part survey data shows that the proportion of children participating weekly in sport has increased in the last 6 months, whilst participation of young adults remains unchanged. Thus determining the impact of the Games on sport participation for young people is more challenging. Evidence does however indicate that the range of legacy participation programmes, including Change 4 Life Sports Clubs, Sportivate, Premier League 4 Sport and Inspire have provided significant participation opportunities, with participation sustained beyond the life of the programmes. In addition, over a third of children and a quarter of young adults indicated that the 2012 the Games motivated them to do more sport which in turn suggests that the Games has affected sport participation for these age group.

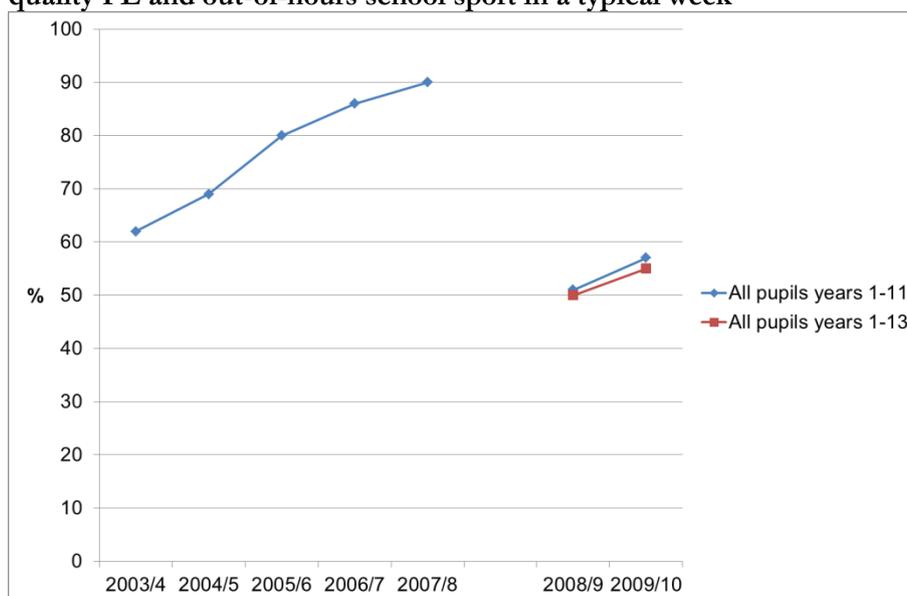
The answer begins by exploring the trends in participation in sport, before investigated the extent to which the Games may have impacted on participation.

Data on disability is only highlighted in this section, and discussed fully in section 3.5.

(i) Children aged 5 to 15: participation trends

The Department for Education annual surveys of the Physical Education and Sport Strategy for Young People (PESSYP)²⁴ from 2003/4 to 2009/10 indicated that 55% of pupils in years 1 to 13 participated in at least three hours of high quality PE and out-of-hours school sport in 2009/10, with overall participation increasing since 2003/4 (although from a different base). Between 2003/4 and 2007/8, participation was measured for two hours (increasing to three hours in 2008/9). Findings indicated that on this basis, participation rates increased from 62% to 90% during this period (Figure 3-10).

Figure 3-10: Percentage of pupils who participated in at least two or three hours of high quality PE and out-of-hours school sport in a typical week



Source: PE and Sport Survey, Department for Education

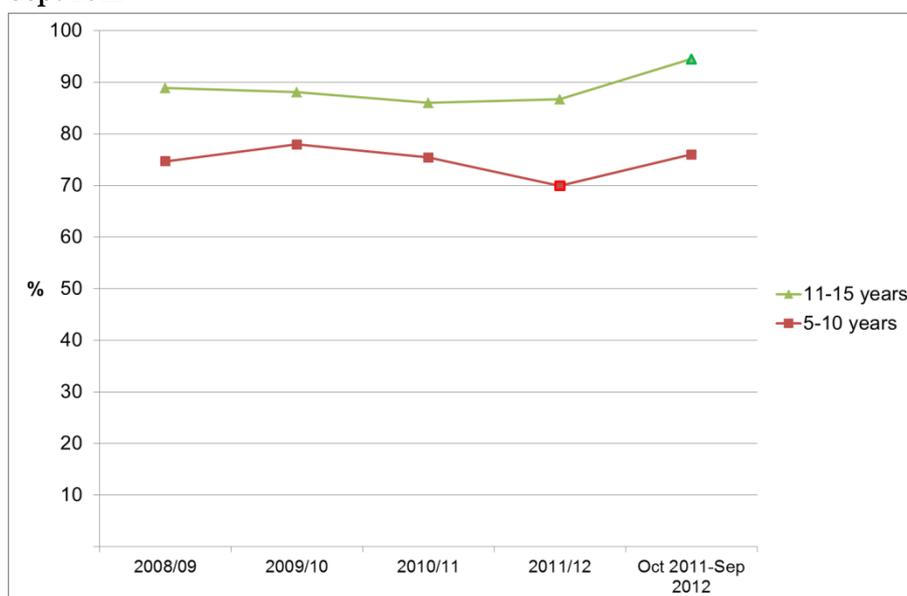
Note: Surveys were based on responses from teachers. Between 2003/4 and 2007/8, participation was measured for two hours (increasing to three hours in 2008/9).

²⁴ PESSYP was jointly led by Department for Culture, Media & Sport and Department for Education, and contributed to participation, elite sport and (soft) infrastructure objectives. Although PESSYP begun as a national initiative in 2002, it was subsequently adapted to help meet 2012 Games objectives and was enhanced with additional funding of £100 million over the 2008/9-2010/11 period, to help create a lasting legacy from the Games.

According to the latest child participation data from Taking Part (October 2011 to September 2012):²⁵

- 5 to 10 year olds:
 - Three quarters did sport outside school in the past week with no statistically significant difference since 2008/09 (Figure 3-10);
 - 82.5% did sport outside school in the last four weeks. These levels have remained steady since 2008/09, with no statistically significant change; and
 - Participation by boys was higher than that of girls.
- 11 to 15 year olds:
 - 94.4% did sport in or outside school in the last week with a statistically significant increase since 2008/09 up from 88.8%. This change has been driven by statistically significant increases since 2011/12 when participation was 86.6%.
 - 94.7% did sport in or outside school in the last four weeks. These levels have remained steady since 2008/09, with no statistically significant change; and
 - Participation was fairly similar for boys and girls with only slightly higher rates recorded for boys.

Figure 3-11: Percentage of children who did sport in the last week, 2008/09 to Oct 2011-Sept 2012



Source: Taking Part

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

Data for 5 to 10 year olds is outside school only, whilst data for 11 to 15 year olds is for both in and outside school.

The extent to which the Games may have impacted on these participation levels is obviously a key part of this research question, and is explored below.

(ii) Children aged 5 to 15: impact of legacy programmes, initiatives and investment

Investment in programmes, including School Games, Change 4 Life Sports Clubs, Premier League 4 Sport and Inspire have already generated and continue to generate participation opportunities.

²⁵ Interviews for those aged 5 to 10 are conducted with the adult respondent by proxy and, due to this, the 5 to 10 survey is limited to asking about activities undertaken out of school (with the exception of some questions on competitive sport). For 11 to 15 year olds, the questions are asked directly to the child and cover both in and out of school activities.

School Games, which has over 16,000 schools registered and over 13,000 actively engaged, is clearly generating significant participation opportunities and is discussed in detail in section 3.4. Section 3.4 also contains detail on additional funding ring-fenced for sport to be received by primary schools.

Change 4 Life Sport Clubs

Since 2010, the Youth Sport Trust has been creating a network of school-based sports clubs using Olympic and Paralympic sports and values to motivate and inspire less active children and young people to participate in physical activity and sport. Change 4 Life Sports Clubs is due to run for five years from 2010, with the first year funded by DCMS and then taken on by the Department of Health from the second year onwards. Initially launched into secondary schools in 2010/2011 and rolled out into primary schools in 2011/2012, the idea was to use increased participation as a feeder into levels 1 and 2 of the School Games initiative.

Some of the key highlights from the Change 4 Life Sports Club 2010/2011 evaluation include:²⁶

- 61,175 young people participated in Change 4 Life Sports Clubs in 2010/11, exceeding the key performance indicator (KPI) of 40,000. In 2011/12, in the first year of clubs in primary schools, over 62,000 children took part and over 91,000 children had participated in Change 4 Life Sports Clubs in secondary schools by the end of the 2012 school year;
- At the end of 2010/11, 90% of participants (54,810 young people) chose to play sport every week and were positive about sport (an increase of 40% from around 38,000 upon joining a Change 4 Life Sports Club);
- Change 4 Life Sports Clubs out-performed the counterfactual case (the most likely alternative intervention in a scenario in which the Olympic and Paralympic Games were not being held in London in 2012), generating in excess of that which was modelled for the counterfactual case, namely:
 - Over 50,000 more participants; and
 - Over 13,000 more 'non-sporty'²⁷ participants.

Premier League 4 Sport

Premier League 4 Sport aimed to get 25,000 young people aged 11 to 16 to join local sports clubs in four Olympic sports (table tennis, judo, badminton and volleyball) by 2011. It has been extended to 2013, with additional Premier League funding and extended to four more sports (handball, netball, basketball and hockey). Based on data received on the programme, highlights to 2012 include:

- 39,327 young people engaged, against a target of 25,000;
- 60% of young people engaged were retained (attended at least 5 sessions per term); and
- 31% of young people engaged were sustained (attended at least 10 sessions over two terms) (Figure 3-12).

Figure 3-12: Premier League 4 Sport achievements

	Engaged	Retained	Sustained
Badminton	9,033	67%	34%
Judo	9,463	61%	31%
Table Tennis	7,748	59%	30%
Volleyball	13,083	59%	26%
Total	39,327	60%	31%

Source: Premier League 4 Sport, 2012 and Beyond, Grant Thornton Analysis

²⁶ Canterbury Christ Church University SPEAR, Sheffield Hallam University Sport Industry Research Centre (August 2011) *Evaluation of the Change 4 Life School Sports Clubs Programme Final Report*

²⁷ Non-sporty children did not do any sport in the last 28 days.

Inspire

As a result of Inspire (discussed in section 3.2), the frequency of participation of children has increased with 12.2% more participants doing sport several times a week after the programme (as compared with before the programme).²⁸

Children also demonstrated higher positive impacts than the population as a whole with:

- 70% planning to take part in sport and physical activity in the future;
- 72% intending to 'have a go' at other/new sports & physical activities ; and
- 60% planning to join a club/programme to take part in sport & physical activity.

Free Swimming

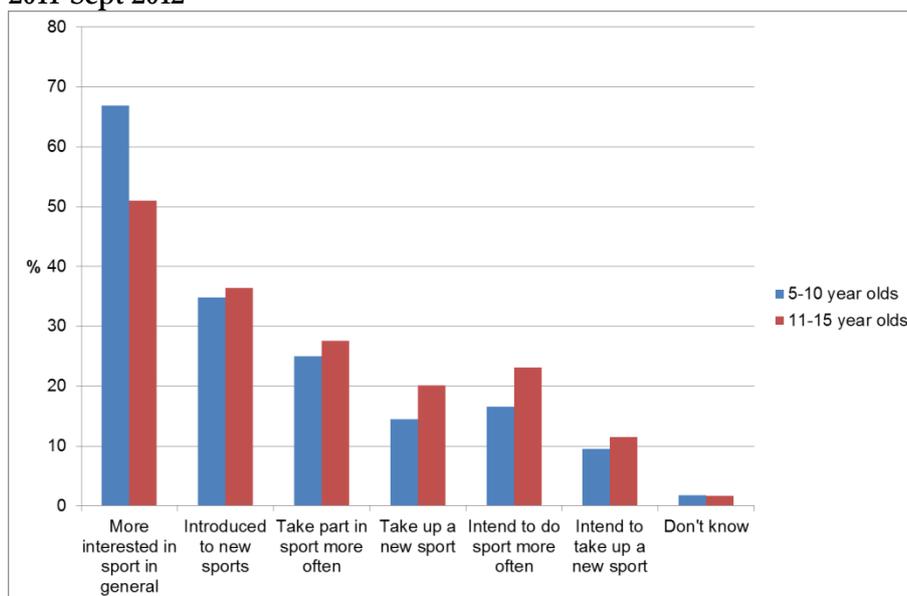
14.91 million free swims were recorded for the 16 and under age group before Free Swimming was stopped, with nearly 90% of free swimmers indicating their intention to continue swimming. Amongst those aged 16 and under, the proportion of free swimmers undertaking more than 60 minutes of physical activity increased from 20.7% to 32.9%. While the increase in activity levels amongst these respondents could not be entirely attributable to the free swimming programme, an evaluation²⁹ concluded that it is likely some of it was. A lack of overall additionality contributed to the programme being closed, although it should be noted that the programme did generate some participation opportunities.

(iii) Children aged 5 to 15: impact of the Games

It is apparent through the evidence available that the Games acted as a motivator for participation, with over one third (36%) of 5 to 10 year olds and over a half (52%) of 11 to 15 year olds being encouraged to take part in sport 'a lot' or 'a little' as a result of the UK hosting the Olympic and Paralympic Games between October 2011 to September 2012.

Of those who responded that they were encouraged (either a little or a lot) to take part in sport by the Games, a quarter indicated that they had taken part in sport more often with 16.5% of 5 to 10 year olds and 20.1% of 11 to 15 year olds intending to do more sport (Figure 3-13).

Figure 3-13: Percentage of those children that were encouraged by the Olympic or Paralympic Games to take part in sport that were encouraged in different ways, Oct 2011-Sept 2012



Source: *Taking Part*

Note: Confidence intervals range between +/-1.5 and +/-5.9.

²⁸ Knight, Kavanagh and Page (February 2013) *London 2012 Olympic Games and Paralympic Games Inspire programme legacy survey*

²⁹ Pricewaterhouse Coopers (June 2010) *Evaluation of the Impact of Free Swimming, Year 1 report – main report*

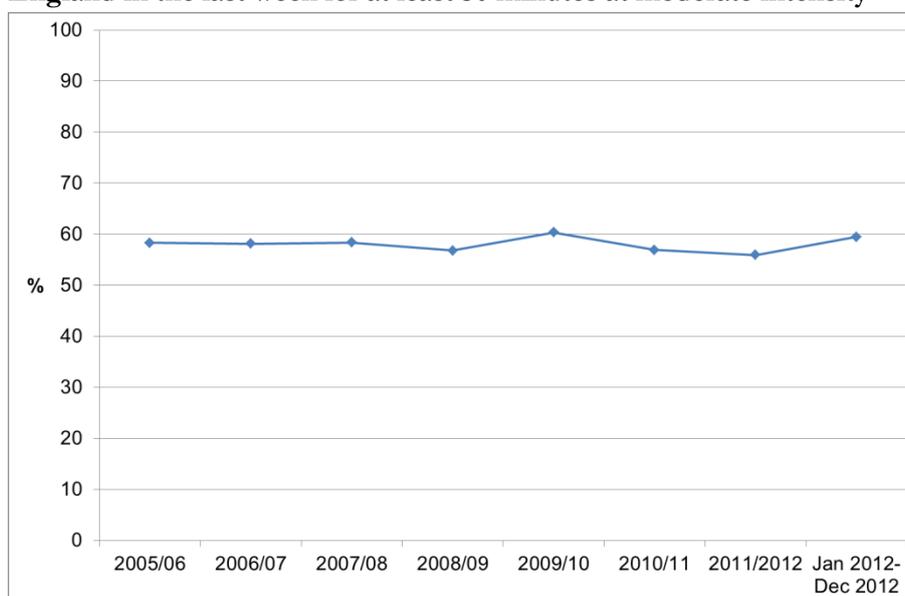
(iv) Young adults aged 16 to 24: participation trends

Taking Part shows 16 to 24 year olds participate in the most sport. However, unlike the rest of the adult population which have increased, levels of participation by 16 to 24 year olds have remained steady since 2005/6 to January to December 2012, with no statistically significant changes (Figure 3-14). An explanation for this may be the small sample size for this subgroup, making detecting changes more difficult.

However according to the Active People survey, there was a statistically significant decrease in participation for those aged 16 to 24 years, from 55.7% in October 2005-October 2006 to 54.0% in October 2011-October 2012.

The survey findings do not suggest a significant increase in participation for young adults, making it clear that any impact on this group is smaller than for the population as a whole.

Figure 3-14: Percentage of young people (aged 16 to 24) participating in sport in England in the last week for at least 30 minutes at moderate intensity



Source: Taking Part

Note: There are no significant changes from 2005/06.

(v) Young adults aged 16 to 24: impact of legacy programmes, initiatives and investment

Investment in programmes, including Sportivate and Inspire as well as investment in infrastructure have already, and continue to generate participation opportunities for young adults.

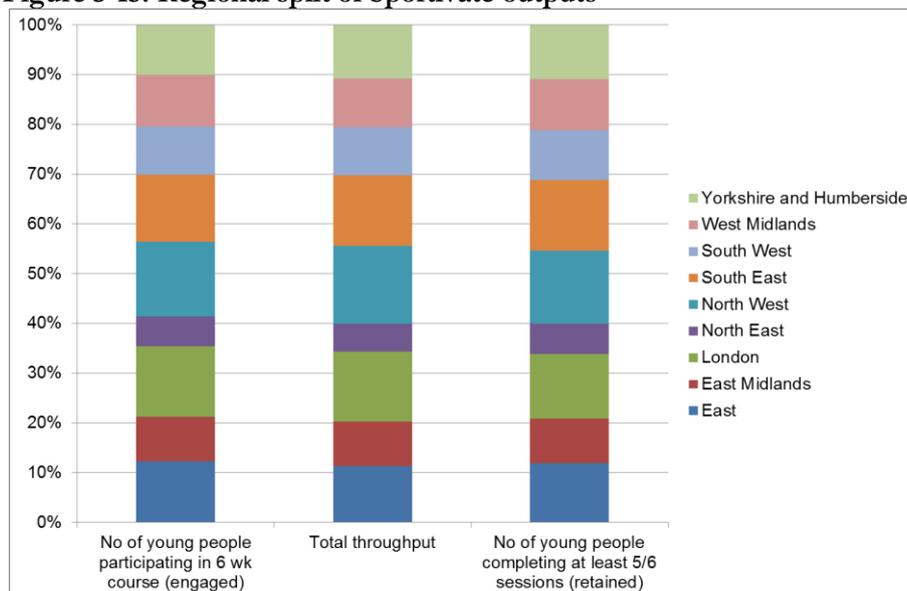
Sportivate

Sport Unlimited, which was part of PESSYP and the forerunner to Sportivate, attracted around 1.2 million young people, retaining 60% (circa 900,000) and sustaining at least 300,000 of these.

Sportivate provides opportunities for teenagers and young adults (aged 14-25) to receive six to eight weeks of coaching in the sport of their choice at a local venue, guiding them into regular participation within their community when the six to eight weeks has ended. Monitoring data over the first 18 months of Sportivate indicates that to 5 October 2012:

- 140,555 young people were engaged (i.e. participating in a 6-8 week course);
- 115,404 young people (82% of those engaged) completing at least all but one session (retained) – 83% of the total target for years 1 and 2; and
- 820,894 attendances in total.

These impacts are being realised regionally with a fairly even split of beneficiaries. This is further supported by detailed regional data (Figure 3-15).

Figure 3-15: Regional split of Sportivate outputs

Source: Sport England, data to 5 October 2012

Evaluations³⁰ of the first 18-months (April 2011 to March 2012) of Sportivate indicate that retention and sustainability are high:

- 82% of those engaged have been retained; and
- 72% of those engaged have been sustained.

There is reasonable demographic split of retained participants, though more are white, male and young (14 to 16 years old), with 7% disabled. Just under half (47%) of the young people indicated that they are doing more sport than they did before taking part in Sportivate, with 57% of these indicating that the increase is due to Sportivate. There is also further evidence of sustainability and additionality with 12% of those engaged and 11% of those retained being non-sporty (not participating in sport in the last month) before joining Sportivate. This reduces to only 3% of those surveyed after engagement, as participants move into the semi-sporty or sporty categories.

Therefore, it can be concluded that Sportivate is creating opportunities and sustaining sport participation. With an extra £24 million worth of funding to expand and extend the Sportivate programme to 2017 opportunities will continue to be created.

Inspire

As a result of Inspire (discussed in section 3.2), the frequency of participation of young people in sport has increased with 6.9% more participants doing sport several times a week after the programme (as compared with before the programme).³¹

Young people also demonstrated higher positive impacts than the population as a whole with:

- 57% planning to take part in sport and physical activity in the future;
- 65% intending to 'have a go' at other/new sports & physical activities ; and
- 49% planning to join a club/programme to take part in sport & physical activity.

Infrastructure

³⁰ Sport Structures (no date) *Sportivate Programme Evaluation, Annual report April 2011 – March 2012* and Sport Structures (no date) *Sportivate Programme Evaluation, Six Month Report April 2012 – October 2012 (Year 2)*

³¹ Knight, Kavanagh and Page (February 2013) *London 2012 Olympic Games and Paralympic Games Inspire programme legacy survey*

The significant investment in infrastructure, both physical and soft infrastructure has also contributed to participation increases for young people, This is discussed in further detail in section 3.8 and includes investment in the Olympic venues, Places People Play facility strands and venues which hosted the PGTCs.

A survey of PGTCs does reveal that the PGTCs have already impacted sport participation with a perceived significant impact on sports participation as a result of the PGTC (Figure 3-5) with 82% indicating the PGTCs had a positive impact on participation of young people.

The investment in the PGTCs as well as investment in the Olympic Park and out of London venues as well as softer infrastructure should all support participation going forward.

As a result, it is possible to conclude that participation levels for young adults are high, with the Games acting as a significant motivator for participation and more regular participation.

(vi) Young adults aged 16 to 24: impact of the Games

Although it is not straightforward to determine the exact extent to which the Games have impacted on the participation of 16 to 24 year olds, evidence indicates that they have acted as a motivator with 25.2% indicating that the UK hosting the Games have motivated them to do more sport and physical activity. This is statistically significantly higher than the national average of 16% and the highest for all adults.

For those who had participated in sport, just under half (42.8%) indicated that the Games encouraged them to take part in sport more often with 24.7% intending to take part in sport more often.

(vii) Conclusion

Sport participation of children aged 5 to 10 years old and 11-15 years old has statistically significantly increased in the last six months. For 5-10 year olds, 76.0% participated in sport outside school in the last week, reversing the previous downward trend to return to the 2008/09 level, whilst weekly participation inside and outside school for 11-15 year olds peaked at 94.4%, a significant increase on 2008/09. However, participation of young adults aged 16-24 years old has remained steady with 59.4% participating in 1x30 minutes of moderate intensity in the past week.

While it is difficult to determine the exact extent to which the Games facilitated these trends and increase, there is no doubt that the Games have provided significant participation opportunities, with investment in facilities and other soft infrastructure also supporting this.

In addition, the Games has also acted as a motivator for participation, with 36% of children aged 5 to 10, 52% of children aged 11 to 15, and 25% young adults aged 16-24 indicating that the Games had motivated them to do more sport –statistically significantly higher than the national average of 16% for adults.

With on-going investment in School Games to 2015, a £150 million a year boost to primary schools sport and Sportivate running to 2017, these opportunities should continue to be provided and participation levels increased or sustained.

3.4 To what extent has the goal been met of increasing the involvement of young people in competitive school sport?

Determining the impact of the Games on the involvement of young people in competitive school sport is not easy because competitive school sport is not tracked by schools or collected nationally. Taking Part survey data does however provide an indication of competitive school sport, with high levels of participation in competitive sport in school recorded in October 2011 to September 2012.

Although preliminary evidence indicates that School Games, the key legacy competitive school sport programme is providing significant opportunities to thousands of schools, and in turn millions of school pupils, to participate in competitive school sport, in the absence of any

evaluation evidence, the extent to which the Games, and School Games has impacted on the involvement of young people in competitive school sport is not known.

The following sections look in more detail at the extent to which competitive school sport has changed with an assessment of the potential impacts of the School Games on competitive school sport opportunities.

Data on disability is only highlighted in this section, and discussed fully in section 3.5.

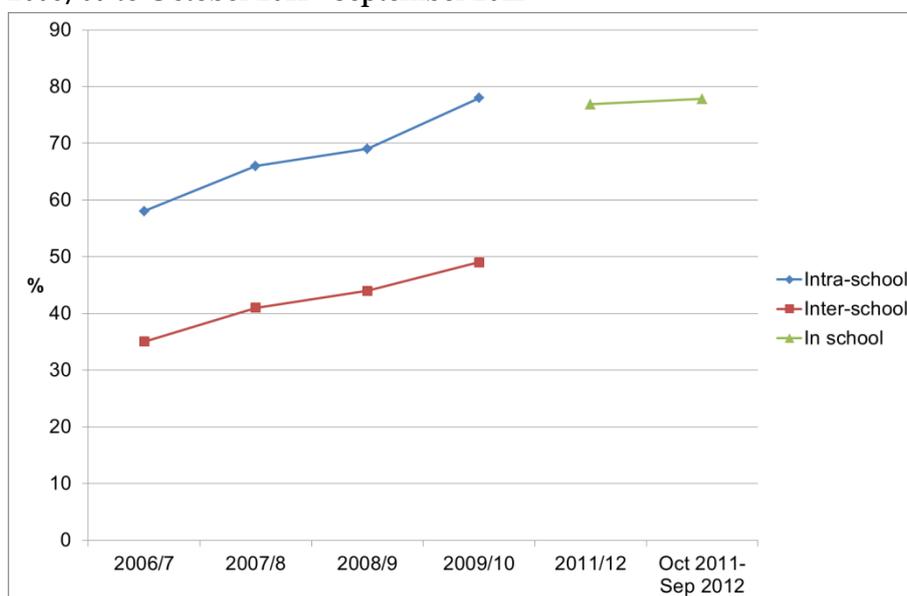
(i) Participation trends

Department for Education annual surveys from 2003/4 to 2009/10 of PESSYP indicated participation in intra-school activities (excluding sports days) increased from 58% in 2006/07 to 78% in 2009/10 – a 20% point increase in four years. Almost half the pupils in years 1 to 11 participated in inter-school competition during the 2009/10 academic year, a 14% increase over the last four years (Figure 3-16).

However, when assessing participation in regular competition, 39% of pupils were engaged in regular intra-school competition, and 21% engaged in regular inter-school competition. This relatively low level of participation in regular intra- and inter-school competition provided the policy justification for ending PESSYP and putting in place School Games.

The latest Taking Part survey data on competitive sport³² shows that from October 2011 to September 2012, 81.6% of 5-15 year old children reported they had done some form of competitive sport in and outside of school in the last 12 months – 77.8% had taken part in competitive sport in school, whilst 37.9% had taken part outside of school. There have been no statistically significant changes since 2011/12, which was the first full year of data.

Figure 3-16: Competitive sports participated in by children in the last 12 months, 2006/07 to October 2011 - September 2012



Source: PE and Sport Survey, Department for Education, Taking Part

Note: Data from 2006/7 to 2009/10 is based on PE and Sport Surveys with intra- and inter-school sport reported separately. Data from 2011/12 and Oct 2011-Spe 2012 is based on the Taking Part survey with intra- and inter-school sport reported as one category.

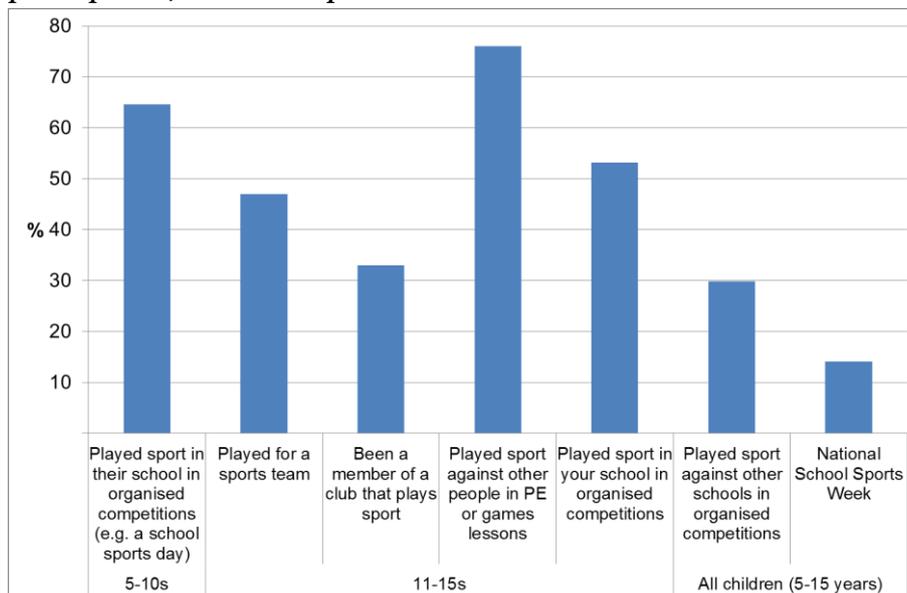
PE and Sport Surveys are based on data provided by teachers about years 1 - 13, while for Taking Part this is based on individual responses (parents for those aged 5 to 10 and the children themselves for those aged 11-15)

Three quarters of children aged 11 to 15 played sport against other people in PE or games lessons with 65% of 5 to 10 year olds playing sport in their school in organised competitions

³² Data is split into data into 'in school' and 'out of school' activities for both 5 to 10 year olds and for 11 to 15 year olds.

(e.g. a school sports day). Almost a third of 5-15 year olds played sport against other schools in organised competitions (Figure 3-17).

Figure 3-17: Percentage of children who did competitive sport in school, by type of participation, Oct 2011-Sept 2012



Source: *Taking Part*

Note: Confidence intervals range between +/-2.1 and +/-4.1

Although the PESSYP data and Taking Part are not directly comparable, the PESSYP data did show an increasing trend in competitive school sport between 2006/7 and 2009/10. Although there is limited trend data from Taking Part, evidence does indicate that participation levels are relatively high and are being maintained.

(ii) Competitive school sport programmes

School Games

School Games is a framework of competitions led by Sport England and delivered by the Youth Sport Trust, with additional funding from the Department of Health. 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.

According to Sport England, by the end of 2012, over 16,000 schools were registered for the School Games, with the following breakdown:

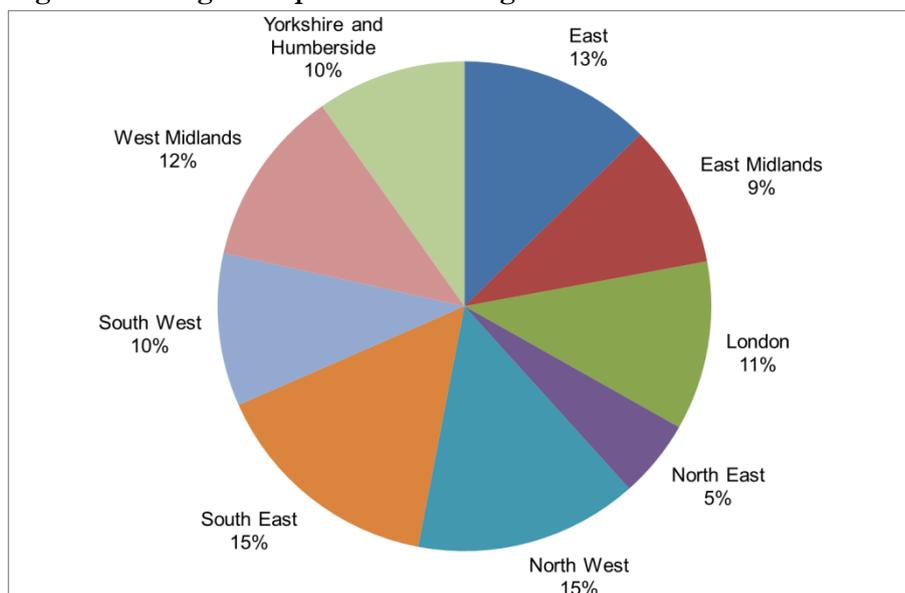
- 11,495 primary schools;
- 3,500 secondary schools;
- 83 16+ FE colleges;
- 642 special schools;
- 8 special colleges; and
- 386 other schools.

In addition, the following had been secured:

- 450 School Games Organisers in post;
- 46 Local Organising Committees created for Level 3 Festivals; and
- 31 competition formats at intra-school and inter-school level developed.

Schools from throughout the UK have registered (Figure 3-18) and the target of 12,000 schools by summer 2012 has been exceeded. Over 13,000 schools are actively engaged with the School Games, having registered on the latest system.

Figure 3-18: Regional split of schools registered for School Games



Source: Sport England, data to end December 2012

The Department for Education has provided funding of £65 million up to the end of the 2012/13 academic year to ensure that one PE teacher in every secondary school could be released for one day a week to, amongst other things, help encourage greater take-up of competitive sport in primary schools and secure a fixture network for schools to increase the amount of intra- and inter-school competition. While not formally a part of School Games, the funding has helped schools engage in the programme.

An evaluation of the School Games is being undertaken although the results are not yet available. This evaluation will provide additional data on the impact of the Games. However, an interim evaluation³³ of the first year of the School Games indicates "*a successful first year of delivery, with significant enhancements to connectivity between levels and improvements to county events reported throughout the course of the year*". In addition the evaluation reported a greater number of opportunities encompassing a wide range of sports. Some NGBs (e.g. Amateur Swimming Association and Rugby Football Union) reported focusing their offer of sport to schools and adapting the competition format to tailor their offer to the School Games programme.

The interim evaluation also found that the School Games structure was viewed positively, as it provides greater clarity of what competition should look like, standardises formats and demonstrates how links between levels should be made.

It is still relatively early for the impacts of the School Games to be realised. In addition, in some cases the extent of activity, especially at level 1 is not known. However, there is growing evidence of better cohesion in terms of connecting up competition and events, which are starting to mirror the seasonality and progression of the School Games and therefore, a more joined up system is emerging. A number of schools also reported that their competition programme had increased during 2012, which is seen as a positive step forwards in terms of school sport competition.

A further strength of the School Games have reportedly been the inclusive nature of the programme with respondents highlighting the integration of disabled participants within mainstream sporting events and festivals as a significant positive and the opportunity for

³³ Sheffield Hallam University Sport Industry Research Centre (August 2012) *School Games, Executive Summary, Year 1*

disabled participants to compete at the same time as participants from mainstream schools giving a real sense of inclusion to the programme. Data for a School Games national event in May 2012 indicated that 167 disabled athletes took part in Paralympic-type events, equivalent to 11.6% of the total number of 1,439 athletes.

Additional Funding

In March 2013 the Government announced a £150 million a year investment for the next two years in school sport and PE to primary schools. This funding, which is in addition to School Games, will be ring fenced. It will also be allocated directly to primary schools across England with the schools determining the most appropriate use of this funding for school sport and PE related activities. It will be allocated through a lump sum for each school and a per-pupil top-up mechanism – a typical primary school with 250 pupils will receive around £9,250 each year. This funding is as a result of the Games, with investment in school sport seen as a critical sporting legacy.

PESSYP

An evaluation³⁴ of the Competitive School Sport strand of PESSYP also revealed that the volume of sport competitions (intra and inter-school) increased under PESSYP, resulting in more young people taking part in competitive school sport. Opportunities were also created for young disabled people, as well as people from different ethnic backgrounds, with good representation by gender. Although PESSYP is not a specific legacy programme, and only benefited from extra funding as a result of the Games towards the end, it provided some of the foundation for the Government's key legacy on competitive school sport competition. Subsequently the School Games then provided an increased focus on competitive school sport.

(iii) Conclusion

It can be concluded that the School Games appears to have created a system through which additional and better quality competitive school sport opportunities were created, building on some of the elements of PESSYP. Given that School Games runs until 2015, along with the further investment in primary school sports provision, it will continue to provide competitive opportunities for young people, and thus impacts as a result of the Games will continue to be realised beyond 2012.

3.5 How far have accessible opportunities for disabled people to participate in sport and physical activity been maximised, through supporting equality of access to Games-related participation programmes?

Disabled people are an explicit target group for legacy benefits, with an objective being to increase the participation of disabled people of all ages in sport and physical activity.

While opportunities to participate are crucial, providing the supporting infrastructure in the form of accessible facilities and softer infrastructure, like coaching and sport volunteering are equally important.

According to Taking Part in January-December 2012 period participation by disabled people increased statistically significantly to 29.3%, up from 25.1% in 2005/6³⁵. Although the exact extent to which the Games has maximised accessible opportunities for disabled people to participate in sport is difficult to quantify, evidence from Sportivate, School Games, PESSYP and Legacy Trust UK indicates that these legacy participation programmes have provided opportunities for disabled people to participate in sport. Taking Part data also indicates that the Games has motivated disabled people to do more sport. In addition the investment in inclusive sport by Sport England as well as the investment in the facilities hosting PGTCs, Places People

³⁴ Sheffield Hallam University Sport Industry Research Centre (30 September 2011) *Evaluation of Competitive School Sport, Final Report*

³⁵ The definition for disabled people varies between data sources and surveys and thus the measurement of the impact on disabled people varies. When referencing data related to disabled people it thus needs to be noted that this will be specific to the data source and may not be comparable between sources and surveys.

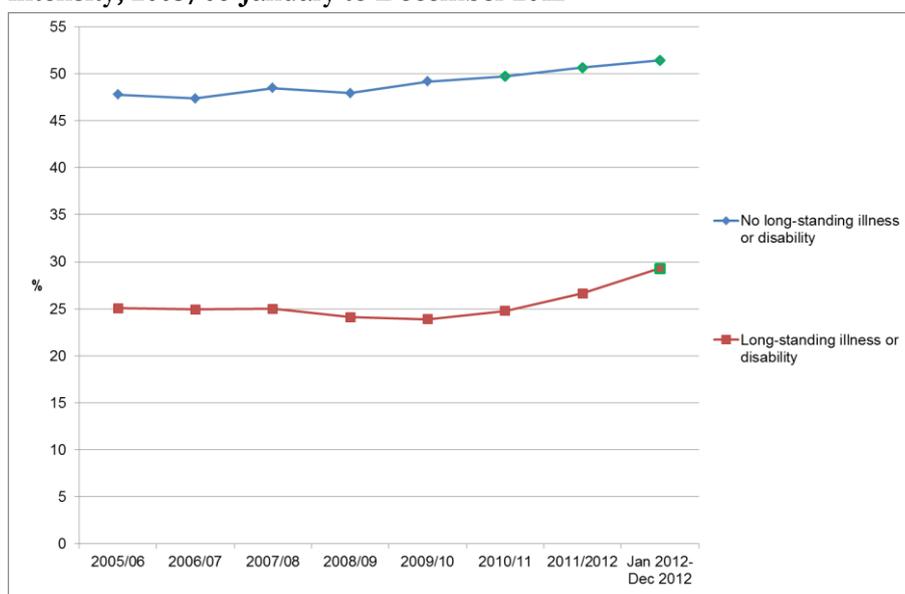
Play facility strands and the Olympic venues should continue to provide the infrastructure to support sport participation by disabled people.

This section focuses on participation, with infrastructure discussed in further detail in section 3.9.

(i) Participation trends

After a remaining steady between 2005/6, and 2009/10 those with a long-standing illness or disability have seen a steady rise in participation since 2010/11, with a statistically significant increase in participation in the January to December 2012 period at 29.3%, compared with 25.1% in 2005/06 (Figure 3-19). The gap between disabled and non-disabled people is also closing, from 25.3% in 2009/10 to 22.1% in January to December 2012.

Figure 3-19: Adult participation in sport (including recreational walking and cycling) by long term illness status in England in the last week, for at least 30 minutes moderate intensity, 2005/06-January to December 2012



Source: *Taking Part*

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

The Active People survey also recorded a statistically significant increase in participation with participation by those with a limiting disability increasing from 15.1% in 2005/06 to 18.3% in 2011/12.

Figure 3-20 below shows similar patterns of sports participation for disabled people in Wales and Northern Ireland.

Figure 3-20: Long-term illness and sports participation by adults in the past four weeks in Wales and Northern Ireland, 2008/09

Nation	Demographic category	2008/09
Wales	Long-term illness, health problem or disability	35.0%
	No long-term illness, health problem or disability	65.0%
Northern Ireland	Has limiting long-standing illness	22.0%
	Does not have limiting long-standing illness	53.0%

Source: *Active Adults Wales, Continuous Household Survey Northern Ireland*

Participation by children aged 5-15 with a limiting disability appears to have risen, from 78.5% in 2010/11 to 82.5% in the October 2011 to September 2012 period, however the small sample sizes mean this result is not statistically significant.

Although it is not straightforward to determine the exact extent to which the Games have contributed to this increase, the following sections attempt to explore how the programmes, initiatives and investment may have impacted on participation by disabled people.

(ii) Impact of legacy programmes, initiatives and investment

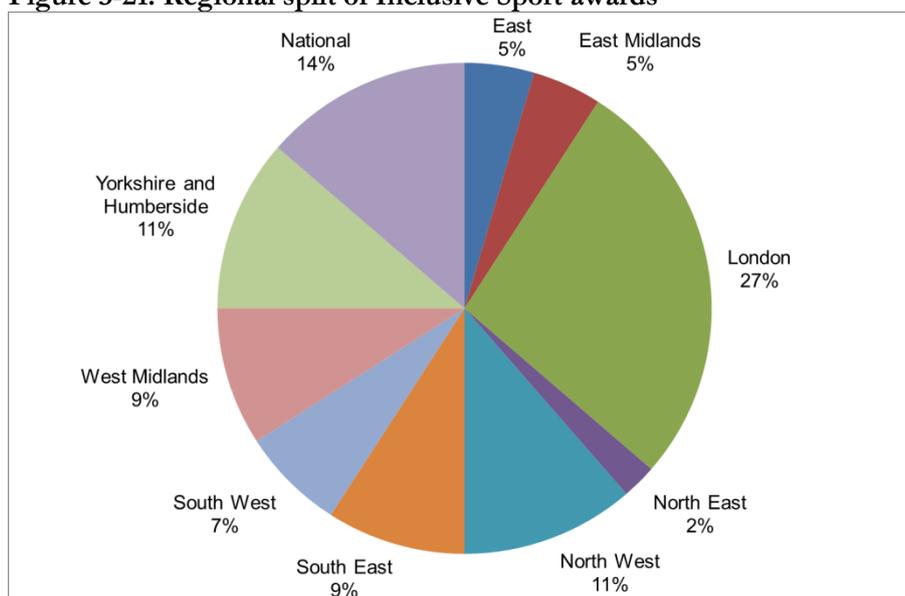
Many of the legacy programmes have provided participation opportunities to disabled people. The impacts of these are discussed below, although it should be noted that only programmes with evidence of the involvement of disabled people are discussed. Other programmes may well have resulted in opportunities but with no available evidence these have not been included.

Inclusive Sport

One of the key programmes is Sport England's Inclusive Sport, which through the Inclusive Sport Fund, will invest over £10 million of National Lottery funding into projects designed to increase the number of disabled young people (age 14+) and adults regularly playing sport.

According to monitoring data from Sport England, 318 applications were received with 44 awards made across the English regions³⁶ (Figure 3-21). The projects aim to help more disabled young people (age 14+) and adults to play sport regularly. This investment is intended to help tackle the opportunity gap that sees one in six disabled adults playing sport regularly, compared to one in three non-disabled adults, and make sport a viable choice for disabled people. The 44 projects have each been awarded revenue funding for either two or three years of delivery.

Figure 3-21: Regional split of Inclusive Sport awards



Source: Sport England, data to 31 December 2012

As these awards have only recently been made, the impact of this funding is unknown; however, it is likely to create additional opportunities boosting participation for disabled people.

Other evidence

Several programmes had specific targets related to disabled people with many projects resulting in positive participation impacts for disabled people³⁷. Where evidence of impacts exists, this has been summarised below:

³⁶ It should be noted that the proportion of disabled people in the population varies by geography, with a higher proportion of disabled people living in Wales and Northern England than in London and the South East (see Office for Disability Issues, *Fulfilling Potential Building Understanding*).

³⁷ Disability was not defined in the various programme evaluations and reports.

- Sportivate
 - Over 6,700 disabled participants have been retained, 6% of the total retained;
 - The retention rate was marginally higher for disabled participants than the overall average;
 - A greater proportion of disabled participants are male, compared to the overall average. However this may be due to the greater number of disabled boys than girls in the general population;³⁸
 - A greater proportion of disabled participants were white, though less were in the 14 to 16 age category, compared to the overall average; and
 - Disabled participants were less sporty before joining Sportivate than the overall average.
- School Games
 - Data for the School Games national event in May 2012 indicates that 167 disabled athletes took part in Paralympic-type events, equivalent to 11.6% of the total number of 1,439 athletes. Given that approximately 6% of children are disabled, this represents significantly better representation of disabled people during the School Games national event.
- PESSYP
 - An evaluation³⁹ of the Competitive School Sport strand of PESSYP revealed competitive school sport opportunities were created for young disabled people.
- LGA
 - According to a survey conducted with councils during and after the Games, a third reported the number of disabled users increasing, with only 2% reporting a decrease.
- PGTC
 - A survey of PGTCs does reveal that these Games venues have impacted sport participation with a perceived significant impact on sports participation as a result of the PGTC (Figure 3-5). Fifty-three percent of respondents indicated the PGTCs had a positive impact on participation of disabled people. However all camps that hosted Paralympic teams indicated a positive impact on participation of disabled people..
- Legacy Trust UK
 - Legacy Trust UK, set up in 2007 to support communities and organisations across the UK to create projects that celebrate the 2012 Games, has allocated £40 million of funding through twelve regional and four national programmes. Data available for Eastern Rising, the regional programme for the East of England, indicates that of the 23,100 participants 2% were disabled participants.

(iii) Impact of the Games

Taking Part survey data indicates that 13% of those with a limiting disability were motivated by the Games to do more sport. Of these 39% were encouraged to do more sport by the Games and 9% were encouraged to take up a new sport.

(iv) Conclusion

It is apparent from the evidence currently available that the Games have acted as a motivator for participation, with additional opportunities for disabled people to participate in sport and physical activity created by programmes like Sportivate, Legacy Trust and School Games. With the current investment in Sport England's Inclusive Sport and the fully accessible Games

³⁸ According to the Office for Disability Issues, boys are more likely to be disabled than girls, with boys 2.5 times more likely than girls to have a statement of special educational need at primary schools (2% compared with 0.8%) and three times more likely at secondary school (2.9% compared to 1%).

³⁹ Sheffield Hallam University Sport Industry Research Centre (30 September 2011) *Evaluation of Competitive School Sport*

facilities within the Olympic Park and outside of London due to open from summer 2013 onwards, on-going participation of disabled people in sport should continue to be facilitated.

3.6 To what extent has the 2012 Games established the foundations for, and led to sustainable changes in participation in sport and physical activity?

Although the evidence discussed in sections 3.2 to 3.5 does indicate that the Games may have resulted in changes in participation in sport and physical activity to the end of 2012, the sustainability of these changes will only be known over time. As such it is too early to fully answer this research question. However, it is possible to explore the extent to which existing evidence points towards how the Games have begun the process of creating the foundations for sustainable changes in sport participation and physical activity.

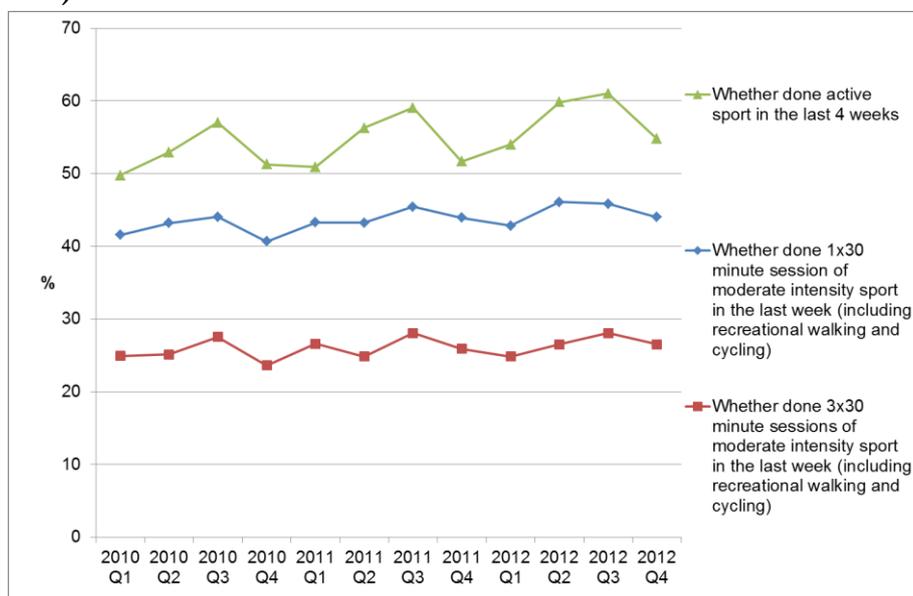
(i) Taking Part

An assessment of quarterly data from the Taking Part survey indicates the extent to which the Games impacted participation.

Figure 3-22 indicates the quarterly breakdown from 2010 to 2012. This shows seasonal fluctuations in sports participation for all three measures. Sports participation is lower in the winter (quarters one and four) and highest in quarter 3. As well as a general seasonal trend, Sport England research⁴⁰ shows that the weather affects regular participants, particularly rain and freezing condition, so a 'bad' winter would reduce participation further.

Whilst the sample size limits the significance of any results, there appears to be a general upwards trend rather than a step change. Interestingly there is not a noticeable jump in Q3 2012 suggesting there was not a large impact directly when the Games were happening. However, Q2 2012 seems to be higher than you might expect, compared to the other quarter twos.

Figure 3-22: Frequency of adult participation in sport in England, by quarter (2010-2012)



Source: Taking Part

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

Taking Part quarterly breakdown data of those motivated to do more sport as a result of the Games from 2010 to 2012 indicates that increased motivation is concentrated in quarters 3 and

⁴⁰ Various data received from Sport England

4 of 2012, corresponding with the Games period and the post-Games months therefore suggesting that sport participation motivation greatly increased during and directly following the 2012 Games.

This motivation does however need to be converted into participation and thus programmes and supporting infrastructure, is vital both in the short term but also as a foundation for sustaining participation over the medium and longer terms.

Econometric research⁴¹ on sport participation based on monthly Taking Part survey data indicates that during the Olympic and Paralympics Games there is a drop in sports participation, particularly in Olympic sports, with around 10% fewer minutes of sports participation. This effect is generally more noticeable in 2012, however, considering the large proportion of people that followed the Games (90% of the UK watched at least fifteen minutes of television coverage⁴²) this result is unsurprising.

(ii) Foundation for participation

Sustaining participation is however dependent on a range of factors including programmes (described above), facilities/ infrastructure and support, including coaching and volunteering.

Supporting infrastructure in the form of accessible facilities and softer infrastructure, like coaching, volunteering and club membership, is in place and is discussed in further detail in section 3.8.

In terms of other support there are a range of organisations providing the foundation to support increased participation including the local authorities and NGBs.

Councils, a significant provider of sporting facilities, have reported an increase in usage of sport and leisure facilities post-Games, an increase in demand that they have responded to by:

- Increasing the number of coaches available;
- Putting on additional sessions or increasing the capacity of existing sessions;
- Investing in new facilities;
- Supporting clubs;
- Introducing waiting lists for oversubscribed activities; and
- Bidding for additional funding to cope with demand.

However, while councils are significant investors in sporting facilities, and are responding to the current increase in demand, given the previous cuts, and in the face of 33% government funding cuts there are concerns as to the extent to which councils will be able to continue to invest in and cater for demand going forward. According to an LGA survey, councils indicated that the following actions are required to maintain their sports facilities:

- Working in partnership with other councils, schools, public bodies, business/ private sector and volunteer and charity groups to deliver services;
- Shared services arrangements with other councils;
- Linking council departments within their own local authority to achieve shared goals e.g. relocating adult day care services into sport and leisure centres;
- Outsourcing leisure services;
- Invest to save programmes;

⁴¹ Dr. Paul Downward, Dr. Peter Dawson and Professor Terrence Mills (2013) *The Impact of the Olympic Games on Sport Participation, Motivation, Health and Well-Being* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex D*)

⁴² See <http://www.bbc.co.uk/mediacentre/latestnews/2012/olympic-viewing-figs.html>. Accessed 23 May 2013.

- Contract renegotiations with providers;
- Reducing costs by outsourcing management, linking staffing levels to peak and off-peak times and monitoring/ reducing and other running costs (e.g. energy costs);
- Applying for external funding;
- Drives to increase membership to generate greater income e.g. discount card aimed at people on low income/ benefits, disabled people, older people, students, children in care and people with health issues and carers;
- Asset transfer to local community groups and clubs;
- Co-location of services within buildings to reduce costs;
- Leasing or hiring out facilities local community groups, sports clubs and training academies to increase income; and
- Working with developers on Section 106 agreements to fund sport and leisure facilities.

The impact of future cuts in the short, medium and long-term are not known; however, any cuts are likely to be an on-going challenge which may impact on the extent to which facility provision can meet any increased demand.

(iii) Sustainable changes in participation

Participation is clearly on the increase, with the following evidence indicating that this may well be sustainable:

- Inspire:
 - A survey of Inspire project organisers indicated that 78% of projects were expected to continue after the Games with 90% of project leads inspired to run similar projects in the future; and
 - A survey of Inspire participants indicated that on scale of 1=low to 10=high respondents felt the following regarding sport (average score):
 - o 7.44 – greater participation by people in sport generally;
 - o 7.12 – greater participation in sport after the Games; and
 - o 7.11 – people being encouraged to adopt healthier lifestyles by exercising.
- Sportivate:
 - 82% of those engaged have been retained and 72% of those engaged have been sustained;
 - 11% of those retained were not sporty, however evaluations showed that this dropped to 4% 3 months after completing Sportivate, as participants became more sporty. This indicates that Sportivate is benefitting those with no or low sport participation, and getting them into sustained participation; and
 - Sportivate is creating opportunities and sustaining sport participation, and with an extra £24 million worth of funding to expand and extend the Sportivate programme to 2017, opportunities will continue to be created.
- Premier League 4 Sport:
 - Of the 39,327 young people engaged, 60% were retained (attended at least 5 sessions per term) and 31% were sustained (attended at least 10 sessions over two terms).
- Walk 4 Life:
 - Walk 4 Life facilitated participation in sport and physical activity, with evaluation evidence indicating that this participation is being sustained. Walk4Life has reported that 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.

These results indicate that the Games have created sustainable opportunities and with Sportivate, Premier League 4 Sport, School Games and Walk 4 Life all continuing, sustainability should be maintained.

(iv) Conclusion

The evidence indicates that the foundations for increased participation have begun to be established with a range of partners supporting the development and maintenance of this foundation.

Although the sustainability of the increase in participation is unknown, given that the economy has been shown to impact upon participation with poor economic performance negatively affecting participation⁴³, the statistically significant increase in participation experienced in a tough economic environment is positive and may point towards a sustainable legacy.

3.7 To what extent has participation in sport and physical activity as a result of the 2012 Games resulted in wider social and economic benefits (in particular health and well-being benefits)?

Participation in sport and physical activity has the potential to result in a range of benefits, including health, well-being, economic, branding/ profiling and business opportunities.

Sport participation as a result of the Games has also resulted in health and well-being benefits. Evidence from Taking Part indicates a strong correlation between sport participation and increased levels of health and happiness (subjective well-being). As the Games have been shown to have impacted on sport participation it follows that the Games (through increased sport participation) have resulted in health and well-being benefits. This is further supported by evaluation data from Inspire, as well as sporting preferences data from UK Sport.

The health and well-being impacts linked to sport participation are discussed below.

(i) Taking Part

There are a range of factors which affect health and subjective well-being (happiness), of which sport and physical activity is only one.

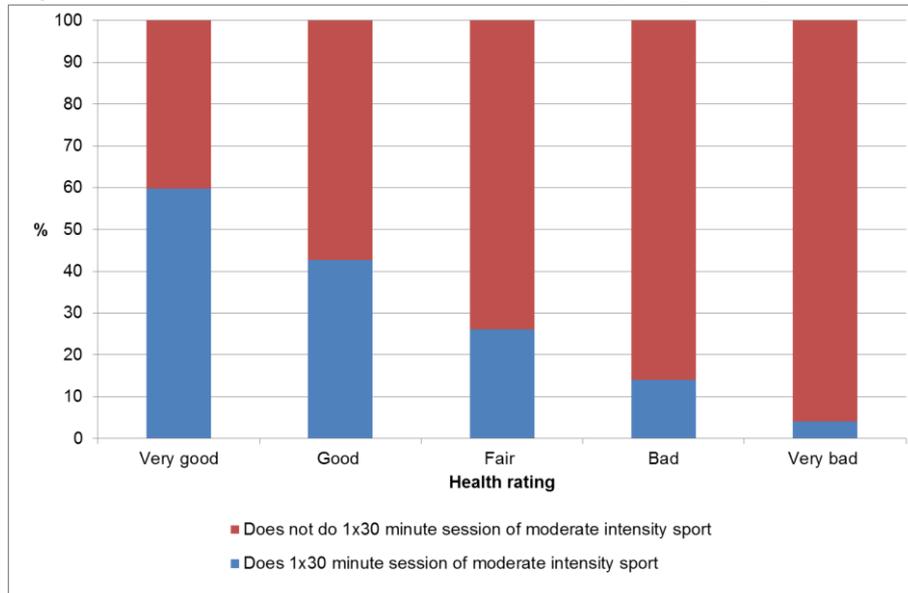
It is important to note at the outset that whilst levels of health (and other resources at the disposal of the individual) which enable participation in sport can be viewed as contextual conditions, over time the health and well-being impacts of sports will change these conditions, in turn producing feedback that may affect sports participation.

Figure 3-23 and Figure 3-24 below show that sports participation can be linked to higher levels of both health and well-being (happiness). Well-being is discussed separately in section 8.9.

In the case of subjective health, of those who state their health to be very good, 59.8% are doing sport (1 x 30mins per week), whilst of those who state their health to be very bad, only 4.1%, do sport.

⁴³ (September 2012) Economic conditions influence participation: 1% drop in GDP results in 0.3% drop in participation nine months later Expensive sports and younger people particularly impacted

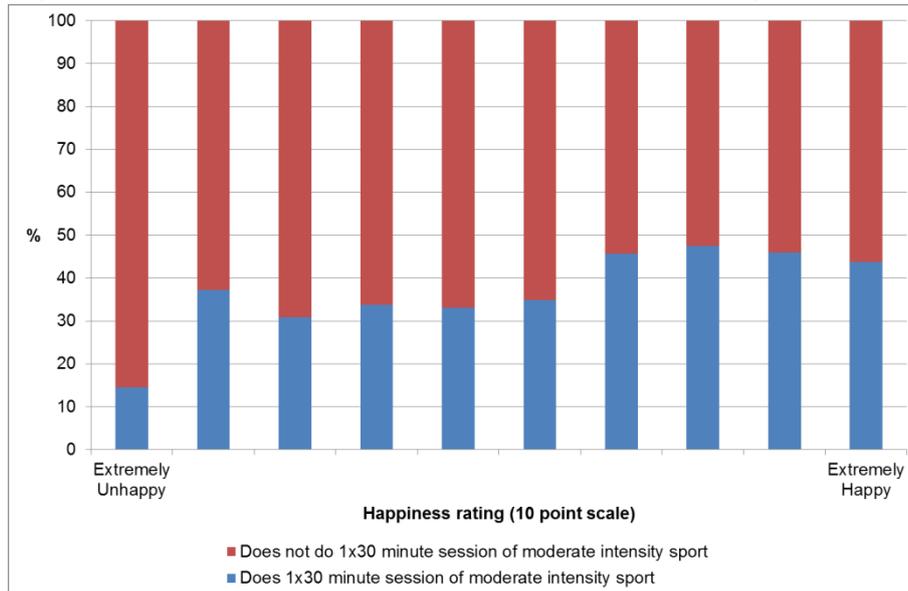
Figure 3-23: Perceived level of adult health and sports participation in England, 2011/12



Source: Taking Part

Those who do sport (1 x 30mins per week) are happier than those that do not and overall, on average, for those who rate their happiness as 7 or above (with the rating going from 1-10 with extremely unhappy at 1 and extremely happy at 10), 46.0% are doing sport. However, for those who rate their happiness in the bottom 4 categories (1-4), 32.7% are doing sport.

Figure 3-24: Adult happiness and sports participation in England, 2011/12



Source: Taking Part

Positive health benefits at the individual level from participation in sport and physical activity are evidenced widely in academic literature, 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 here, it is also true that improved health enables increased sport participation.

Econometric research⁴⁴ on Taking Part survey data indicates that overall there had been a longer term increase in both health and happiness, with health rising in the post-Beijing period and happiness rising in 2012. However, given the wide range of influences on these, it is

⁴⁴ Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base

difficult to distinguish an Olympic effect. Though, as the Games has impacted on participation, and participation impacts on health and well-being, we can therefore conclude that the Games will have impacted on health and well-being.

There is also other evidence to support the impact of the Games on health and well-being, which is summarised below.

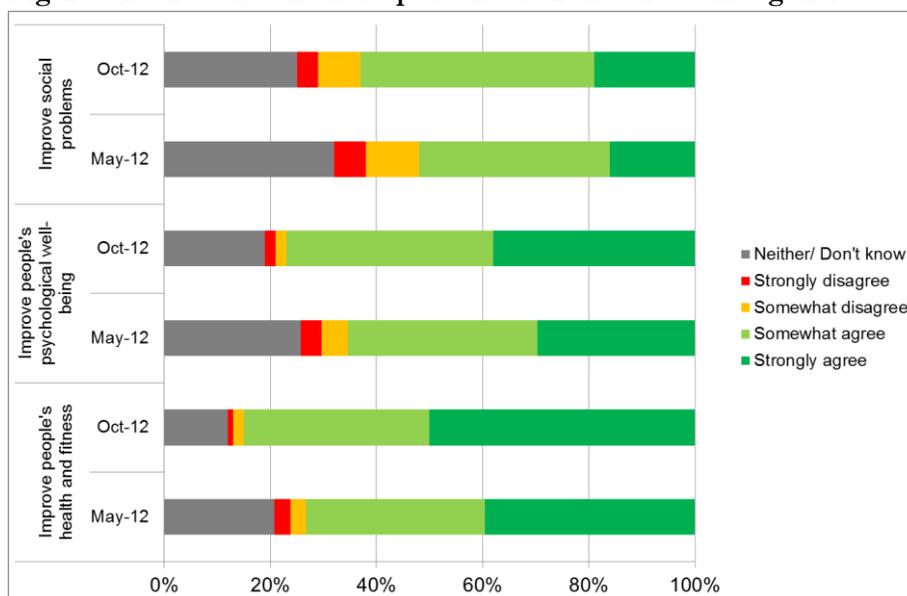
(ii) Other evidence

The following Games-related programmes and evidence indicates that the Games have impacted on health and well-being:

- Inspire
 - According to a survey of Inspire organisers, 73% of projects impacted on the health and fitness of participants; and
 - According to a survey of Inspire participants 55% indicated that Inspire made them feel healthier and fitter (no difference by gender). 77% of 12-15 year olds and 56% of 16-24 year olds indicated that the programme made them feel healthier and fitter.

- UK Sport Sporting Preferences
 - Respondents’ perceptions of the impact of the 2012 Games on well-being related social benefits were significantly higher post-Games. Those agreeing or strongly agreeing with such statements were as follows (Figure 3-25):
 - o Improve people's health and fitness, net agree⁴⁵ – 68% pre-Games, 83% post-Games;
 - o Improve people's psychological well-being, net agree – 58% pre-Games, 72% post-Games; and
 - o Improve social problems, net agree – 35% pre-Games, 51% post-Games.

Figure 3-25: To what extent respondents feel that the Games generated social impacts



Source: UK Sport Sporting Preferences 2012

⁴⁵ Net agree is the difference between those that agree and those that do not providing an indication of agreement accounting for those that do not.

Infrastructure

3.8 To what extent have the 2012 Games been used as an opportunity to secure the sporting infrastructure (personnel, investment and facilities) required to sustain a world class, high performance system, and support increased participation and elite sport across the UK?

Through investment in infrastructure as a result of the Games, the places where people play sport have been and continue to be transformed creating an enhanced infrastructure (both personnel and facilities), which has and will sustain continued community grassroots participation and elite sporting performance. This sporting infrastructure is dependent on a range of factors including:

- Provision of opportunities to participate (discussed in section 3.2 to section 3.5);
- Provision of sufficient and suitable facilities for both community and elite use;
- Access to clubs/ club membership;
- Provision of sport volunteers and volunteering opportunities; and
- Provision of coaching.

Evidence of the extent to which the 2012 Games been used as an opportunity to secure the sporting infrastructure required to sustain a world class, high performance system, and support increased participation and elite sport across the UK is discussed below.

This section is split into two parts:

- Infrastructure related to participation (grassroots); and
- Infrastructure related to high performance system/elite sport.

(i) Evidence: infrastructure supporting increased participation

This section explores the ways and extent to which investment in infrastructure has and continues to support increased community participation. This is structured around investment in facilities as well as club membership, coaching and volunteering.

Investment in facilities

Facility provision in England is high, with 90% of the population able to reach a sport facility within 20 minutes.⁴⁶ Satisfaction with sports provision (of which facilities would be one factor), however is lower, with around 70% of the population in England satisfied with sports provision, unchanged since 2005/6⁴⁷. In Northern Ireland, just over a half of the population is very or fairly satisfied with sports provision.⁴⁸

Significant investment has been made in facilities throughout the UK as a result of London hosting the 2012 Games, including £1 billion being spent on venues at the Olympic Park,⁴⁹ an estimated £124 million on the "places" elements of Places People Play (i.e. Iconic Facilities, Inspired Facilities and Protecting Playing Fields) and significant investment in facilities hosting PGTCs and other venues. This investment has and continues to create the facilities required to support increased participation.

With the Olympic Park venues only opening from 2013 onwards and no evaluation data on the Places People Play infrastructure elements available yet, the extent to which this investment has impacted on sporting provision is yet to be determined. However based on available evidence, these new or enhanced venues are expected to support community and elite participation.

⁴⁶ Audit Commission Choice and Opportunity Indicator – latest available data is 2007/8

⁴⁷ Active People Survey

⁴⁸ Continuous Household Survey Northern Ireland

⁴⁹ See <https://www.gov.uk/government/publications/london-2012-olympic-and-paralympic-games-quarterly-report-october-2012>

In legacy, the Olympic Park will host a range of world class sporting facilities, including the Aquatics Centre, VeloPark, Eton Manor (tennis and hockey centres and 5-a-side football pitches), Stadium and Copper Box (multi-use sports venue). The box below provides an indication of the proposed legacy usage of the sporting venues, clearly demonstrating that the venues are expected to support high levels of usage for local communities as well as catering to national and international elite athletes, with a series of regional, national and international sporting events planned.

Box 3-1: Indicative legacy usage of the Olympic Park sporting venues

- Around 3 to 4 million visits to the Park's sporting venues in 2016 (subject to attendance at the Stadium);
- Community use (i.e. not elite) is estimated to be 94% of the overall visits in the sporting venues (excluding the Stadium) with the combined projected visit number from the local/regional area anticipated to be 1.8 million visits;
- Community sports participation is expected to represent at least 96% of the 1.45 million participation visits to the venues each year (excluding the Stadium);
- High Performance Sport training or competition accounts for at least 58,600 visits per annum (a minimum of 3%); and
- Participation will vary by facility e.g. 93% of visits to the Aquatics Centre are likely to be for participation purposes, with 28% in the Copper Box. Time allocated to community sport participation in the Copper Box is expected to be a minimum of 72% of the available time, whilst in the Aquatics Centre it is expected to be 95% of the available time.

In addition to venues located within the Olympic Park, there are four out of London venues which are new or enhanced, namely Lee Valley White Water Canoe Centre, Hadleigh Farm, Portland and Weymouth and Eton Dorney with stakeholders and other evidence indicating that these world class venues are supporting community participation and elite sport training and in the future will host international events.

Monitoring data on the investment in local facilities in England, through the Places People Play initiatives Iconic Facilities, Inspired Facilities and Protecting Playing Fields, indicate that by December 2012 almost 1,500 facilities had received awards:

- Inspired Facilities – 1,046 awards in three rounds of funding totalling £86m⁵⁰;
- Iconic Facilities – 12 awards in three rounds of funding totalling £26m; and
- Protecting Playing Fields – 236 awards in three rounds of funding totalling £12m.

These programmes will see facilities being enhanced, upgraded and improved. All three programmes are set to continue with further awards to be made until 2013/2014.

Central to the funding awards is that the investment in facilities must support participation with the projects expected to create hundreds of thousands of opportunities (Figure 3-26). This is evidence of the Games being used as an opportunity to secure the sporting infrastructure required to support increased participation across the UK.

⁵⁰ Including indicative budget expenditure for 2013/2014

Figure 3-26: Participation estimates for Inspired Facilities, Iconic Facilities and Protecting Playing Fields (per project over the 5 years after the works are completed)

Programme	Average annual throughput* estimate per project (years 1-5)	Average annual participants estimate per project (years 1-5)
Iconic Facilities	495,161	13,696
Inspired Facilities	18,029	n/a
Protecting Playing Fields	10,518	n/a

Source: Sport England, based on application data

Note: * Throughput refers to the number of visits (so the same participant can be included multiple times).

In addition to the Olympic venues, there has been significant investment in PGTCs and Games-time training camps. These venues saw the size, type and quality of facilities improving with evidence indicating that this investment has supported increased sports participation.

There were an estimated 266 PGTC agreements across the country with camps located in all the regions of England and in the nations. Consultation with facilities hosting these camps indicates that the extent to which investment in PGTCs was impacted by the Games varied between facilities with some investment that had been planned brought forward as a result of the Games, while other investment was purely as a result of the Games.

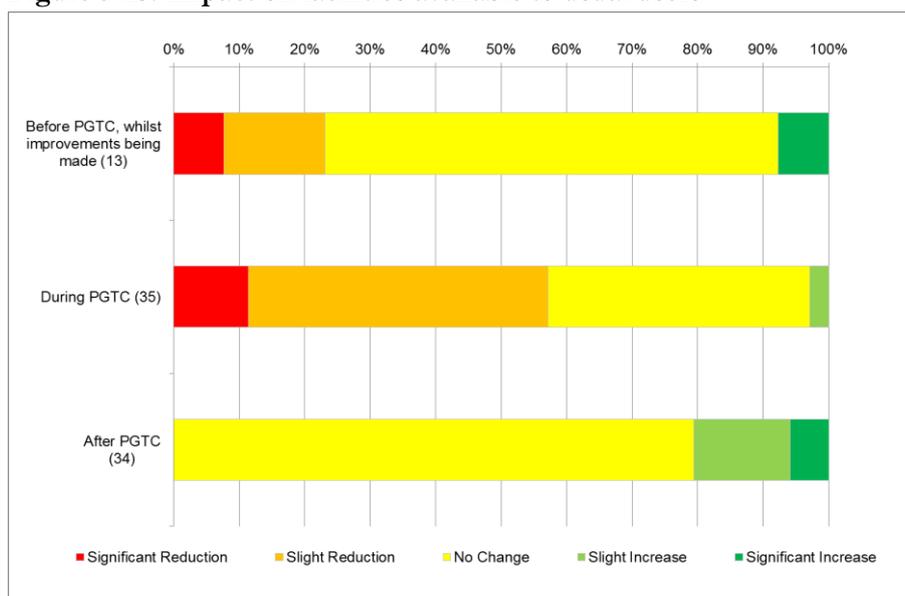
Of 17 PGTC Survey⁵¹ respondents that reported investment in sporting facilities, 13 provided details of investment totalling just under £16.5 million with this dominated by two large investments – £13.5 million investment in the Southend Swimming and Diving Centre and £2 million investment in the Corby Olympic Pool. It should be noted that these investments were only in part due to hosting the PGTC; however, they do provide facilities for usage in legacy. The remaining c. £900,000 was spread across 11 respondents with two thirds being new investment and one third planned investment that was brought forward.

Investment included additional sports as well as increases in quality, access, security and size as follows:

- 6 respondents – additional sports;
- 6 respondents – quality;
- 4 respondents – access;
- 3 respondents – security; and
- 3 respondents – size.

Although over half of PGTC Survey respondents reported reductions in availability for usual users (mainly slight reductions though) during the PGTC, thereafter 21% reported an increase in available facilities (Figure 3-27).

⁵¹ Department for Culture, Media & Sport (2013) *Pre-Games Training Camp Survey* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C*)

Figure 3-27: Impact on facilities available to usual users

Source: Pre-Games Training Camp Survey (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C)

Note: Number of responses shown in brackets

Further evidence of the Games being used as an opportunity to secure the sporting infrastructure required to support increased participation across the UK is the perceived impact on sports participation with:

- 76% indicating the PGTCs had a positive impact on participation;
- 82% indicating the PGTCs had a positive impact on participation of young people; and
- 53% indicating the PGTCs had a positive impact on participation of disabled people.

The impact of local authority spend is also an important consideration with councils a key provider of sporting facilities, spending almost £925 million on sports and recreation facilities in 2011/12, an average of £14.74 per head⁵².

Any increases in participation will thus also need to be supported by councils who are responding to the current increase in demand as discussed in section 3.2. However, given the previous cuts to government budgets, and in the face of 33% government funding cuts there are concerns as to the extent to which councils will be able to continue to invest in and cater to demand going forward.

In addition to facilities, securing "soft" infrastructure is also vital in creating a sustainable sporting system, with investment as a result of Games resulting in increased volunteering, coaching and club membership opportunities.

Club membership

Sports club membership in England has been relatively static, at around 25% of participants, with greater levels of male sports participation and lower levels of female, BMEs and disabled people. Similar patterns for sports-club membership for Wales, Scotland and Northern Ireland are noted for gender and illness/disability, however, whereas the level of engagement in Wales and Northern Ireland is less than in England at 16.1% and 19% respectively, the data for Scotland shows a similar pattern, albeit slightly higher (27%), to club membership as England (Figure 3-28).

⁵² Based on Audit Commission data received from the Local Government Association

Figure 3-28: Sports club membership in England, Scotland, Wales and Northern Ireland

Nation	Demographic category	2005/06	2007/08	2008/09	2009/10	2010/11	2011/12
England	Total	25.10%	24.70%	24.1%	23.85%	23.28%	22.84%
	Male	29.30%	29.00%	28.40%	28.31%	27.54%	26.55%
	Female	21.10%	20.70%	20.00%	19.58%	19.16%	19.27%
	White	25.50%	25.20%	24.60%	24.35%	23.95%	23.50%
	Non-white	21.40%	20.70%	20.30%	19.65%	18.07%	18.26%
	Limiting illness or disability	15.40%	15.60%	14.90%	15.37%	15.76%	16.09%
	No limiting illness or disability	26.90%	26.40%	25.80%	25.41%	24.52%	24.01%
Scotland	Total	-	28.0%	27.0%	-	-	-
	Male	-	36.0%	32.0%	-	-	-
	Female	-	22.0%	21.0%	-	-	-
Wales	Total	-	-	16.1%	-	-	-
	Male	-	-	21.9%	-	-	-
	Female	-	-	10.8%	-	-	-
	Limiting illness or disability	-	-	9.0%	-	-	-
	No limiting illness or disability	-	-	19.0%	-	-	-
Northern Ireland	Total	-	-	19.0%	-	-	-
	Male	-	-	28.0%	-	-	-
	Female	-	-	13.0%	-	-	-
	Limiting illness or disability	-	-	9.0%	-	-	-
	No limiting illness or disability	-	-	23.0%	-	-	-

Source: Active People; Active Adults Wales; Continuous Household Survey Northern Ireland; Scottish Household Survey

Figure 3-29 provides an indication of club membership by sport with rugby union, hockey and archery having the highest membership rates. The only sports which have shown a statistically significant increase between October 2007 to October 2008 and October 2011 to October 2012 are archery, rowing, gymnastics, trampolining and cycling. Golf, rugby league, football, equestrian and angling all showed a statistically significant decrease with the other sports showing no statistically significant change.

Figure 3-29: % of participants that are members of a sports club for that sport¹

Sport	APS2 (Oct 2007-Oct 2008)	APS3 (Oct 2008-Oct 2009)	APS4 (Oct 2009 - Oct 2010)	APS5 (Oct 2010 - Oct 2011)	APS6 (Oct 2011 - Oct 2012)	Statistically significant change between APS2 and APS6
Rugby Union	60.84%	60.70%	62.88%	53.26%	65.35%	No change
Hockey	56.98%	56.07%	59.31%	57.07%	61.60%	No change
Archery ¹	41.13%	40.19%	40.78%	37.50%	54.33%	Increase
Rowing ²	19.24%	33.95%	50.34%	56.23%	46.78%	Increase
Bowls	44.91%	49.89%	54.37%	42.07%	43.76%	No change
Cricket	38.68%	35.49%	46.15%	39.93%	40.22%	No change
Golf	41.63%	41.84%	45.38%	36.83%	38.98%	Decrease
Sailing	32.47%	34.19%	35.86%	26.73%	37.85%	No change

Sport	APS2 (Oct 2007-Oct 2008)	APS3 (Oct 2008-Oct 2009)	APS4 (Oct 2009 - Oct 2010)	APS5 (Oct 2010 - Oct 2011)	APS6 (Oct 2011 - Oct 2012)	Statistically significant change between APS2 and APS6
Netball	37.94%	41.24%	43.44%	35.87%	37.65%	No change
Gymnastics and Trampolineing	15.10%	12.42%	15.18%	33.38%	36.01%	Increase
Rugby League	39.24%	31.29%	43.42%	38.42%	26.34%	Decrease
Tennis ³	27.09%	28.87%	27.05%	26.12%	25.89%	No change
Shooting	28.75%	29.27%	21.72%	30.54%	23.06%	No change
Boxing	27.18%	30.43%	27.83%	25.80%	21.87%	No change
Football	20.44%	18.33%	20.19%	17.46%	18.32%	Decrease
Canoeing and Kayaking ⁴	21.14%	14.70%	19.90%	15.40%	17.70%	No change
Squash and Racketball	19.89%	17.57%	18.55%	19.66%	17.00%	No change
Badminton	15.68%	17.20%	17.71%	15.89%	14.62%	No change
Table Tennis ⁵	18.31%	15.17%	17.15%	14.15%	14.10%	Decrease
Mountaineering ⁶	15.05%	11.03%	13.84%	12.39%	12.98%	No change
Basketball	13.22%	14.06%	17.10%	10.67%	10.88%	No change
Equestrian	8.34%	8.45%	10.01%	5.76%	6.04%	Decrease
Angling ⁷	15.32%	15.09%	18.61%	6.34%	5.87%	Decrease
Athletics	5.05%	5.66%	5.14%	4.46%	4.95%	No change
Swimming	3.34%	3.32%	3.17%	2.85%	3.03%	No change
Cycling	1.72%	2.04%	1.98%	1.58%	2.38%	Increase

Source: Active People

Note:

¹ Since publication of the APS3 results in December 2009, archery figures have been recalculated to include wheelchair sports - archery.

² Since the third quarter of APS4 indoor rowing has been routed out of the overall rowing number. Once a full year's data is available adjustments to figures will be made to maintain continuity in the rowing figures. Current data is not consistent with data before the third quarter of APS4.

³ Since publication of the APS3 results in December 2009, tennis figures have been recalculated to include wheelchair sports - tennis.

⁴ Since publication of the January 2010 - January 2011 results in March 2011, canoeing figures have been recalculated to include rafting.

⁵ Since publication of the APS3 results in December 2009, table tennis figures have been recalculated to include wheelchair sports - table tennis.

⁶ Since publication of the APS3 results in December 2009, mountaineering figures have been recalculated to exclude ice climbing but include bouldering and mountain walking.

⁷ Since publication of the APS3 results in December 2009, angling figures have been recalculated to include wheelchair sports - fishing. The latest rolling 12 month results for angling include respondents who reported angling participation in response to the fishing check question added to the survey during the course of APS4.

As a result of the Games, investments into a range of club membership initiatives were made, including Club Leaders and Premier League 4 Sport, as well as Change 4 Life Sports Clubs. Through these programmes the following club membership opportunities were created:

- **Club Leaders** will provide 10,000 community sports clubs with the chance to develop better business skills by providing training and support to those doing the day-to-day running of community sports and thus helping to create a robust, economically sustainable and enterprising club network. The aim of this project is to help people develop their business skills so that they are better able to assist their clubs realise their full potential.

During 2012 over 1,000 clubs registered to take advantage of the free online support via the Club Leaders website with e-learning modules, downloadable toolkits, discussion forums, Q&As, news and events.

Hundreds of club leaders have also benefited from face-to-face seminars led by subject matter experts across the country. Training provided covers business and financial planning, marketing, governance and facilities management. In some cases tailored training is provided to the sports particular issues.

There are also a number of clubs receiving one-to-one mentoring where support is provided by business professionals to assist club leaders with specific issues they are facing.

This programme is relatively new and it will thus take some time before impacts are realised.

- **Premier League 4 Sport**⁵³ created 80 sport clubs.
- **Change 4 Life School Sport Clubs** formed over 3,500 new school club links⁵⁴ in 2010/11, out-performing the counterfactual (the most likely alternative intervention in a scenario in which the Olympic and Paralympic Games were not being held in London in 2012) by almost 2,000 more school club links and around 2,100 more clubs. By 2011/12 over 4,000 Change 4 Life Sport Clubs were set up in primary schools.⁵⁵
- **NGB Survey respondents**⁵⁶ indicated that club membership (and participation) increased as a result of the Games, although there has been no real noticeable change in the number of clubs. The following examples were provided:
 - British Cycling noted that '*membership is up to an all-time high of 62,000, races are increasing and participation is booming*';
 - British Judo estimated baseline membership growth of 8% per year, with 20% membership growth in 2012 attributed to the 2012 Games;
 - British Wheelchair Basketball estimated a 25% increase in league club participation due to London 2012;
 - British Rowing participation statistics show an increase of 6,595 members from April 2007 to April 2012 (2007: 21,964, 2012: 28,559). Since April 2007, female membership has increased by 45%, with a possible link to increased female performance in 2012 noted. Although the sustainability of this increase in participation is as yet unknown, it was suggested that the requirement to pay for their membership may result in sustained participation;
 - British Taekwondo stated that there has been a 20% increase in membership since August 2012 and a 50% increase in participation at seminars.

With many of the programmes continuing, club membership is a legacy of the Games and will continue to support increased participation.

Volunteering

Sport volunteering is an important element in sporting infrastructure as volunteers provide a range of services which support increased participation.

Sport volunteer levels in England have remained relatively constant, with 5.3% of people volunteering in January to December 2012, up from 4.6% in 2005/6 and 4.1% in 2011/12.⁵⁷ According to Active People,⁵⁸ males are approximately twice as likely to volunteer, for one hour a week in sport, than females. Limiting long-term illness or disability is likely to reduce the probability of volunteering in sport by about 40%. There are similar patterns in Wales with 5% volunteering in sport in 2008/9. In Northern Ireland the data reveals a greater chance of male volunteering in sport, but an even lower proportion of disabled people or people with a long-term illness participating in sport volunteering relative to the total.

⁵³ Premier League for Sport (no date) *Premier League 4 Sport: 2012 and Beyond*

⁵⁴ SPEAR, Canterbury Christ Church University (August 2011) *Evaluation of the Change 4 Life School Sports Clubs Programme, Final Report*

⁵⁵ Data received from Department of Health

⁵⁶ Grant Thornton (2013) National Governing Body Research Report (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C*)

⁵⁷ Taking Part data

⁵⁸ Active People questionnaire changed in 2010/11 thus trend data is not possible

Sport Makers, the key Games-related sport volunteering programme aims to use the Games to create a pool of volunteers to promote and support increased participation. This initiative is fully inclusive, with the aim of contributing significantly to increasing sporting opportunities for disabled people. According to monitoring data as at 28 December 2012:

- 62,279 people had registered;
- 46,307 people had booked to attend an event;
- 38,660 people had attended an event; and
- 17,174 people had been deployed for 10 hours or more.

Monitoring data, analysed as part of the evaluation of the programme⁵⁹, indicates that of the circa 12,700 people that had been registered as Sport Makers for three months or more by June 2012:

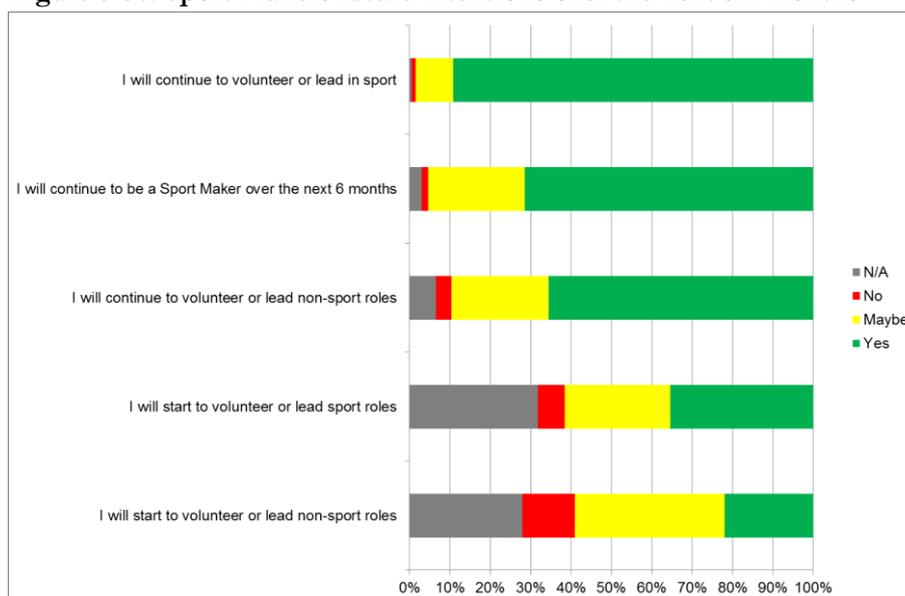
- 4% were disabled;
- 57% were male, 43% female; and
- 34% were aged 16-18, 37% were aged 19-25 and 29% were aged 26 and older.

As part of the evaluation Sport Makers were sent a survey three months after they registered for the programme. Respondents reported a wide range of motivations for joining the programme, the primary being to get more people to participate in sport. Approximately two thirds of those who had undertaken activities as a Sport Maker reported helping out at an existing sports event or club, with 59.2% arranging informal activities for people they knew. Other activities included:

- 34.9% recruited new members to an existing sports club;
- 28.5% had set up their own event or sports club; and
- 15.1% had run an informal sports session with an NGB.

Analysis of the future intentions (for the six months following the survey) of Sport Makers suggests that there could be a sustainable legacy. Almost 90% of respondents indicated that they will continue to volunteer or lead in sport with 93.4% indicating that they will continue to participate in sport (Figure 3-30).

⁵⁹ CFE (August 2012) *Evaluation of People Projects, Interim Report*

Figure 3-30: Sport Makers future intentions over the next six months

Source: CFE (August 2012) *Evaluation of People Projects, Interim Report*

Thus the Sport Makers programme has secured infrastructure required to support increased participation.

Games Makers (which is discussed in more detail in section 5) also needs to be noted, as this programme generated a pool of 70,000 volunteers, many of which played sporting roles which may have facilitated participation opportunities.

Coaching

Together with facilities and volunteers coaching is vital infrastructure component to sustain a high performance system, and support increased participation and elite sport across the UK.

In 2008 there were approximately 1.1 million people providing coaching in the UK, with 'coach' defined as "any individual who is involved in providing coaching" thus incorporating the full range from informally organised volunteers to elite level coaches.⁶⁰ There has been a slight decrease in the total number of coaches since 2004.

In terms of the specific contribution of the Games to the development of coaching expertise, it is at the elite level that there has been the strongest evidence of impact (section 3.11) with coach development at lower levels targeted for growth independently of the decision in 2003 to promote the London bid. However, in the case of elite coach development the development of specific initiatives and funding commitment has likely been accelerated by the Games.⁶¹

The following Games related initiatives have resulted in coaching benefits:

- **Premier League 4 Sport** has facilitated more than 850 sport leader and coaching qualifications to be achieved; and
- **Change 4 Life Sport Clubs** has created opportunities for thousands of children to participate in sport. Central to this is coaching and in 2010/11, the programme trained almost 4,000 coaches out-performing the counterfactual case by around 2,900 more trained coaches. In 2011/12, over 5,000 Change 4 Life coaches and deliverers were trained and deployed across primary and secondary clubs to deliver club activity through working with the NGBs.

⁶⁰ Sports Coach UK (January 2011) *Sports Coaching in the UK III: A statistical analysis of coaches and coaching in the UK*

⁶¹ Cunningham (2001) *Elite Sport Funding Review* (Report to the Prime Minister and the Secretary of State for Culture, Media & Sport)

Although full impacts from the venues and Club Leaders and Sport Makers are yet to be realised, indications are that Games-related investment in infrastructure is supporting increased participation, and with the on-going investment providing a solid foundation to support this.

(ii) Evidence: infrastructure sustaining the high performance system/ elite sport

Section 3.11 discusses in detail the impact of the Games on the high performance system/ elite sport including the effect of investment in infrastructure. The key infrastructure investment likely to sustain the high performance system/ elite sport is that on facilities, as well as coaching with investment in club membership and volunteering, while supportive of mass participation, less likely to impact significantly on the high performance system.

In terms of facilities, the Olympic Park and other out-of-London venues are likely to have the most significant impact for elite sport through the provision of a range of world class venues to host international competitions with the European Hockey Championship in 2015, and IAAF World Athletics Championships and World Paralympic Athletics Championships in 2017 already secured.

The Olympic Park venues and other Olympic and Paralympic facilities were commended by some NGBs as being world class with some, like the Velodrome said to be the best in the world. In terms of usage, just over half (55%) of the sports surveyed suggested that the new facilities will have a 'very positive/positive' impact on their sport.

In terms of coaching, the Elite Coach and Elite Coach Apprenticeship Schemes will support sustaining the high performance system in the UK. The Elite Coach Programme is designed for coaches operating in a world class performance environment with four intakes since 2004 and 32 graduates. The Elite Coach Apprenticeship scheme is aimed at those coaches emerging on the world class performance landscape with 12 coaches who have benefited from this programme.

NGB interview respondents commented positively on the value of the elite coach development programme, seeing this as a positive step in developing greater available elite competence. This view is also reflected in the quantitative data from the survey questionnaire with 72% of respondents indicating that the impact of the Games on coaching was either strongly positive (21%) or positive (51%) compared with 28% who argued that there was no impact.

(iii) Conclusion

There has been significant investment in the Olympic Park venues, PGTCs and other programmes like Places People Play although the full impact of this investment is yet to be realised. However, with the legacy focus of the Olympic Park venues and participation targets of Places People Play, as well as the club membership, coaching and volunteering infrastructure created, it seems likely that this investment has and will continue to facilitate the sporting infrastructure required to sustain a world class, high performance system, and support increased participation and elite sport across the UK.

3.9 How far have accessible opportunities for disabled people to participate in sport and physical activity been maximised (and specific barriers to participation been reduced) through Games-related investments in infrastructure?

Increasing the participation of disabled people in sport and physical activity has been, and remains, a key legacy objective. Section 3.5 provides a discussion of the significant and on-going sport participation opportunities for disabled people as a result of the Games. However in addition to participation opportunities, investment in facilities, including the Olympic venues, Places People Play facilities and venues hosting PGTCs also supported participation of disabled people. This was further facilitated by investment in personnel, including the Sport Maker volunteers.

The following sections explore the investment in facilities as well and programmes and personnel as a result of the Games and the potential accessible opportunities created for disabled people.

(i) Facilities

Accessibility was an area of focus for the Olympic Delivery Authority (ODA), London Organising Committee of the Olympic Paralympic Games (LOCOG) and the London Legacy Development Corporation (LLDC) when designing and constructing the venues to ensure that disabled people are able to use the facilities within the Olympic Park in legacy, to participate in events and to attend as spectators or supporters with the Paralympic Games assisting in focusing efforts on this. How this will translate in practice will only be known once the venues re-open; however, based on the Paralympic experience, and stakeholder feedback, the Olympic Park venues were commended for being accessible for disabled athletes and supporters and are expected to be fully accessible in legacy, supporting participation opportunities for disabled people, both community and elite users alike.

Although there is limited information available on the extent to which investment by PGTCs supported accessible opportunities, evidence based on a subjective assessment of impact indicated that the PGTCs had a positive impact on sports participation by disabled people, with 53% of respondents indicating a large or small positive impact. In addition, 45% indicated that the PGTC had a positive impact on the awareness of disabilities.⁶²

Other Games-related investment in facilities includes the £124m investment⁶³ in the Places People Play programmes – Inspired Facilities, Iconic Facilities and Protecting Playing Fields. With investment on-going and evaluation evidence not yet available, the extent to which these facilities will support the participation of disabled people remains unknown and will need to be assessed in time.⁶⁴

(ii) Programmes and personnel

Participation opportunities for disabled people through key programmes are discussed in more detail in section 3.5 with one of the key programmes aimed at increasing the number of disabled adults and young people (aged 14+) who regularly play sport being Sport England's £10m Inclusive Sport Fund. Forty-four projects have each been awarded revenue funding for either two or three years of delivery. As these awards have only recently been made, the impact of this funding is unknown; however, it is likely to create the infrastructure to provide additional opportunities and boost participation by disabled people.

Overall, club membership and volunteering in England are generally lower for disabled people (Figure 3-31), with club membership levels having increased since 2005/6. In the case of volunteering, the question asked as part of Active People changed in 2010/11 and therefore data is only available for two years.

Figure 3-31: Sports club membership and sport volunteering in England by limiting illness/disability October 2005 to October 2006 to October 2011 to October 2012

Area		2005/06	2007/08	2008/09	2009/10	2010/11*	2011/12
Club membership	No limiting illness or disability	26.90%	26.40%	25.80%	25.41%	24.52%	24.01%**
	Limiting illness or disability	15.40%	15.60%	14.90%	15.37%	15.76%	16.09%
Volunteering	No limiting illness or disability					7.60%	7.92%
	Limiting illness or disability	-	-	-	-	5.23%	5.68%

Source: Active People

⁶² Department for Culture, Media & Sport (2013) Pre-Games Training Camp Survey (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C*)

⁶³ Including indicative budget expenditure for 2013/2014

⁶⁴ There are no specific disability targets for the Places People Play projects (other than Inclusive Sport) although all are intended to have a positive impact on participation by disabled people (as well as non-disabled people). Iconic Facilities are also required to comply with Sport England's design guidance which sets accessibility standards over and above the Disability Discrimination Act requirements.

Note: *At the start of Active People Survey 5 (2010/11), the volunteering question was changed to incorporate a wider definition of sport volunteering. As a result, comparisons with previous years' data should not be made. While there has been a statistically significant increase in volunteering, this is likely to be due to the change in the way volunteering is described in the question.

** Statistically significant decrease since 2007/8

Similar patterns in sport volunteering are noted for Wales, Northern Ireland and England (Figure 3-32), although with no additional data available the trend over time is not known. While club membership by disabled people is the same in Wales and Northern Ireland (9%), this is lower than that in England (15%); however, different surveys are used making it difficult to directly compare the data.

Figure 3-32: Sports club membership and volunteering in Wales and Northern Ireland by gender, 2008/9

		Wales	Northern Ireland	England
Volunteering	Limiting illness or disability	3%	3%	3%
	No limiting illness or disability	5%	6%	5%
	Total	5%	5%	5%
Club membership	Limiting illness or disability	9%	9%	15%
	No limiting illness or disability	19%	23%	26%
	Total	16%	19%	24%

Source: *Active Adults Wales; Continuous Household Survey Northern Ireland; Scottish Household Survey; Active People*

Recognising that club membership and volunteering is lower for disabled people, many legacy initiatives have been designed to be fully inclusive. For example, Sport Makers has disabled people as a target group and 4% of the circa 12,700 Sport Makers on VolunteerWeb are disabled people.

(iii) Conclusion

Although the full impact of the extent to which accessible opportunities for disabled people to participate in sport and physical activity as a result of Games-related investment in infrastructure is yet to be quantified, evidence from PGTCs and Sport Makers indicates that these opportunities were facilitated through the Games. In addition, as Sport England's Inclusive Sport programme starts to deliver and with Sports Makers on-going, additional opportunities should continue to be developed.

3.10 To what extent and how have 2012 Games-related venues, facilities and personnel been embedded within local communities across the UK, and contributed to wider social and economic strategies and programmes?

Although it was always recognised that the Games would generate significant opportunities for East London, there was a clear desire that benefits should accrue to the rest of the UK as well. Essentially the aim was that investment in Games-related venues, facilities and people would be made throughout the UK with these facilities and personnel becoming part of the communities in which they are located forming part of the wider social and economic strategies and programmes. In short these facilities and personnel would become embedded within the communities and part of the future develop the areas in which they are located.

There is currently limited evidence of the extent to which facilities and personnel have become embedded within wider social and economic strategies, however evidence indicates that Games-related investment in sporting infrastructure has generated a range of social and economic benefits which does indicate that they have been embedded in these communities.

The following sections explore the extent to which benefits have been realised across the UK as a result of Games-related investment in facilities and personnel.

(i) Facilities

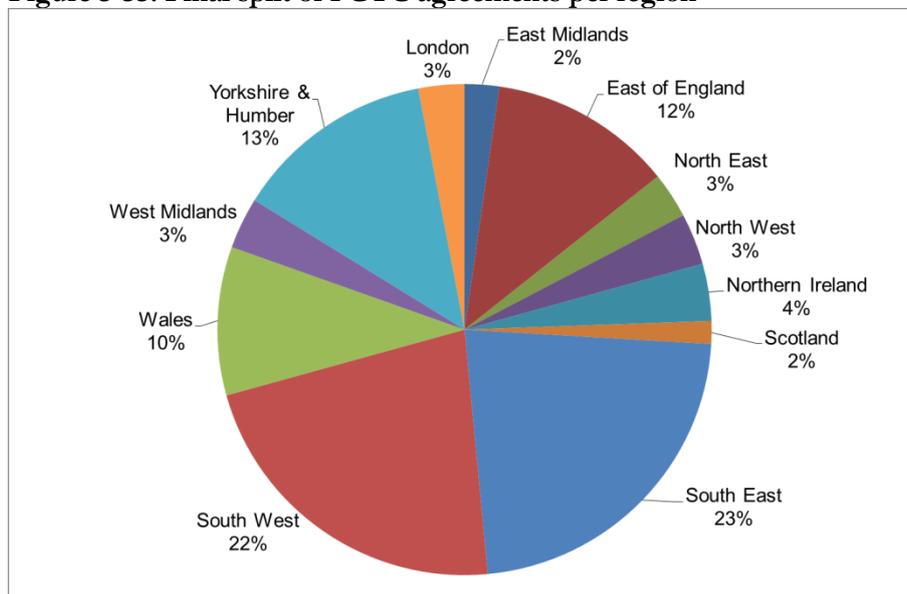
The significant investment in the development of the Olympic Park, of which the sporting venues form a major part, has impacted on the local community and contributed to the social and economic development of this part of London.

However investment in the other venues, namely the Lea Valley White Water Canoe Centre, Hadleigh Farm, Portland and Weymouth, and Eton Dorney as well as the PGTCs have and will continue to generate benefits for the communities in which they are located.

In addition to providing local communities with sporting facilities, the venues will also host regional, national and international events (e.g. the Lea Valley White Water Canoe Centre will host the World Canoe Slalom Championships in 2015) which will in turn generate economic benefits.

PGTCs have already generated benefits for the communities in which they are located. There were over 250 PGTC agreements⁶⁵ in place across the UK, spread across the country (Figure 3-33).

Figure 3-33: Final split of PGTC agreements per region

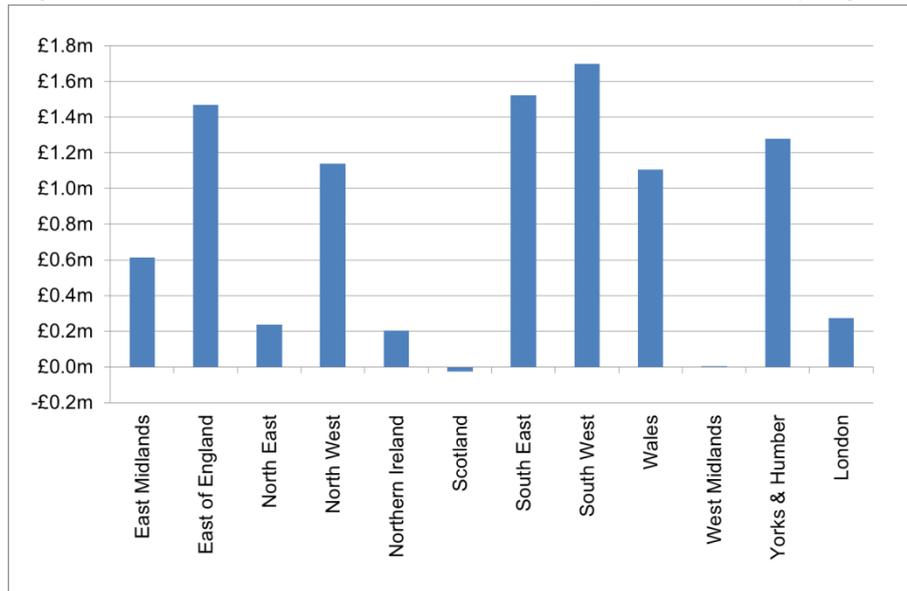


Source: Pre-Games Training Camp Survey (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C*)

The PGTCs generated an estimated direct economic benefit of £10m to the UK economy, with this split across the regions (Figure 3-34).

⁶⁵ An estimated 266 agreements were in place according to the DCMS (2013) (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C*)

Figure 3-34: Estimated net direct economic impact of PGTCs by region



Source: Pre-Games Training Camp Survey (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C)

In addition to economic benefits, evidence indicates that these camps generated a range of benefits for the facilities as well as communities in which they were hosted including:

- 88% indicated a positive impact on connections to visiting nations;
- 88% indicated a positive impact on pride in local area;
- 45% indicated a positive impact on awareness of disabilities;
- 91% indicated a positive impact on promotional activities;
- 91% indicated a positive impact on the profile of the area regionally and internationally;
- 82% indicated a positive impact on the profile of the area nationally;
- 78% indicated a positive impact on local business;
- 53% indicated a positive impact on tourism;
- 30% indicated a positive impact on inward investment; and
- 12% indicated a positive impact on exports.

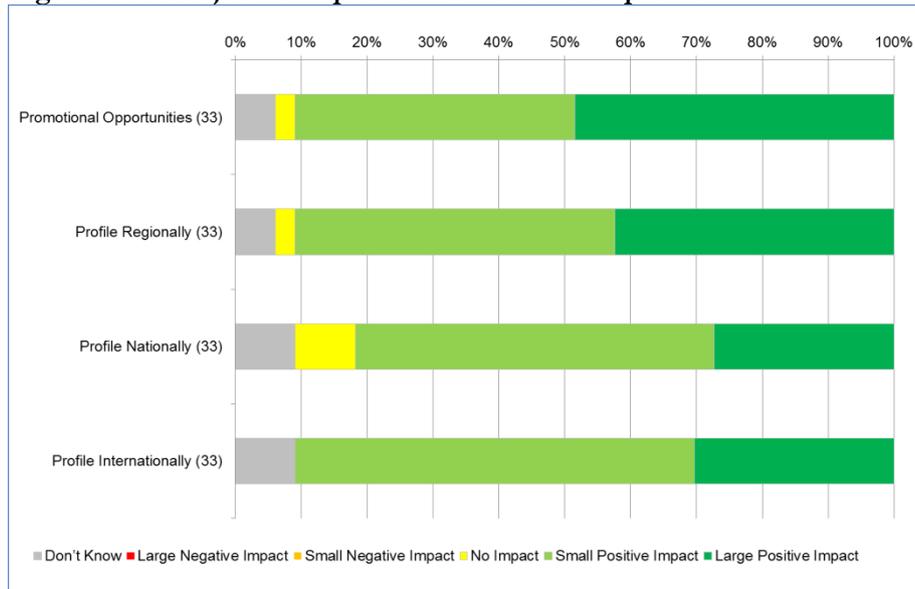
Figure 3-35: Subjective impact of PGTCs on social benefits



Source: Pre-Games Training Camp Survey (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C)

Note: Number of responses shown in brackets.

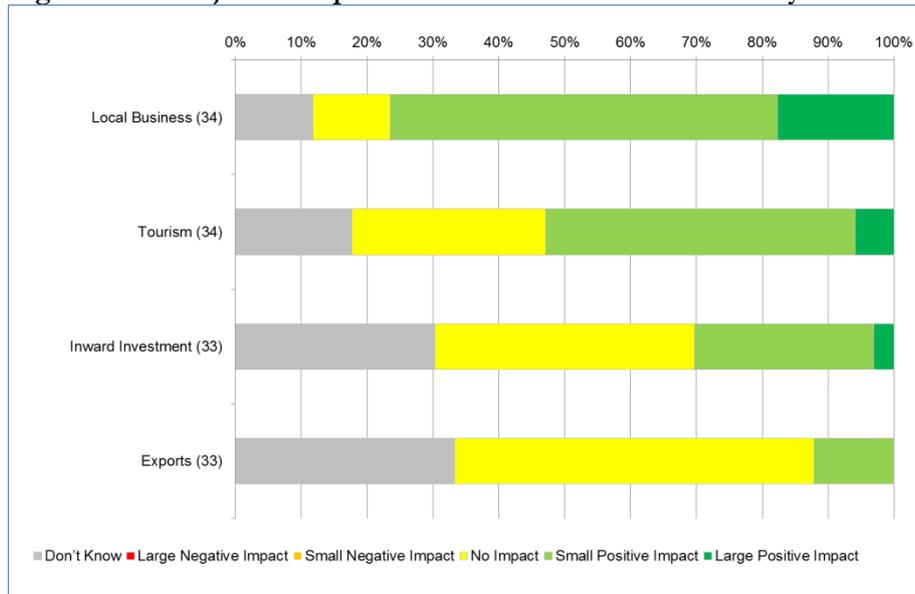
Figure 3-36: Subjective impact of PGTCs on area profile



Source: Pre-Games Training Camp Survey (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C)

Note: Number of responses shown in brackets.

Figure 3-37: Subjective impact of PGTCs on the wider economy



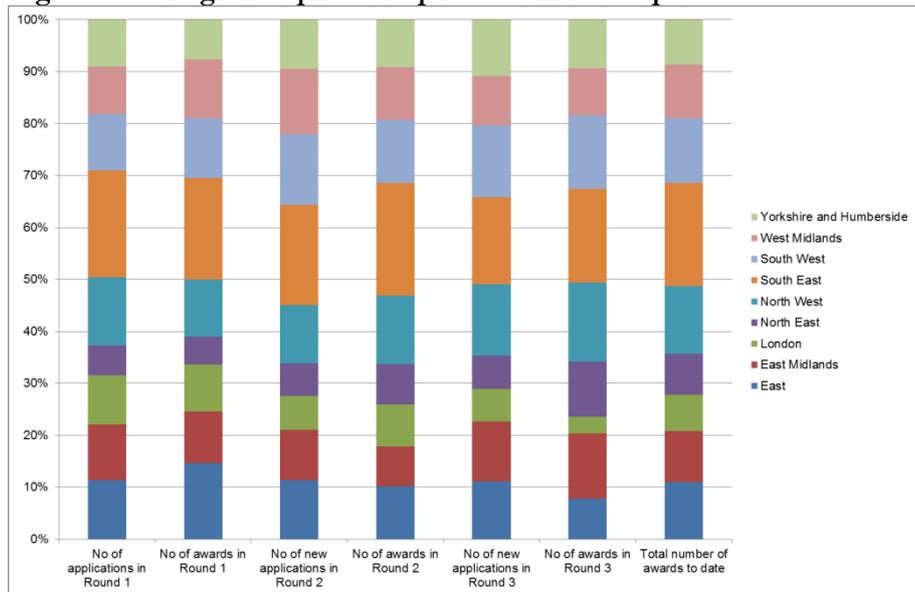
Source: Pre-Games Training Camp Survey (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C)

Note: Number of responses shown in brackets.

Thus the Games-related investment into facilities which hosted PGTCs appears to have created a solid foundation resulting in benefits to the areas. This does indicate that these venues have become embedded within the communities, providing participation, profiling, tourism and other opportunities, however the extent to which local areas capitalise on this will determine future impacts.

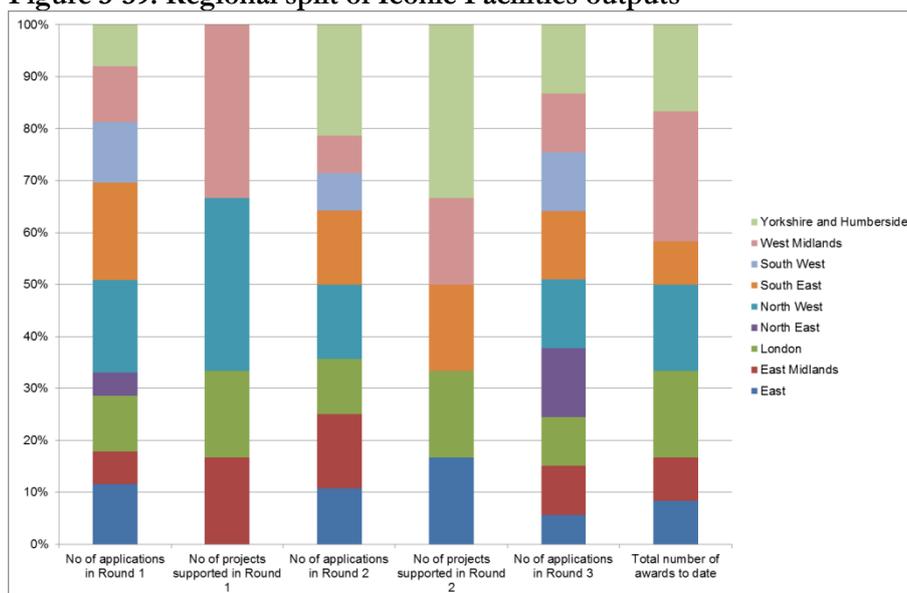
In addition to the PGTCs, £124m has been invested in Inspired Facilities, Iconic Facilities and Protecting Playing Fields, with these facilities located throughout the regions of England. Application and awards data by round and region is shown in Figure 3-38, Figure 3-39 and Figure 3-40. There is no evaluation or impact evidence available yet, however the projects are required to support participation which indicates that these venues should become embedded within the communities in which they are located.

Figure 3-38: Regional split of Inspired Facilities outputs



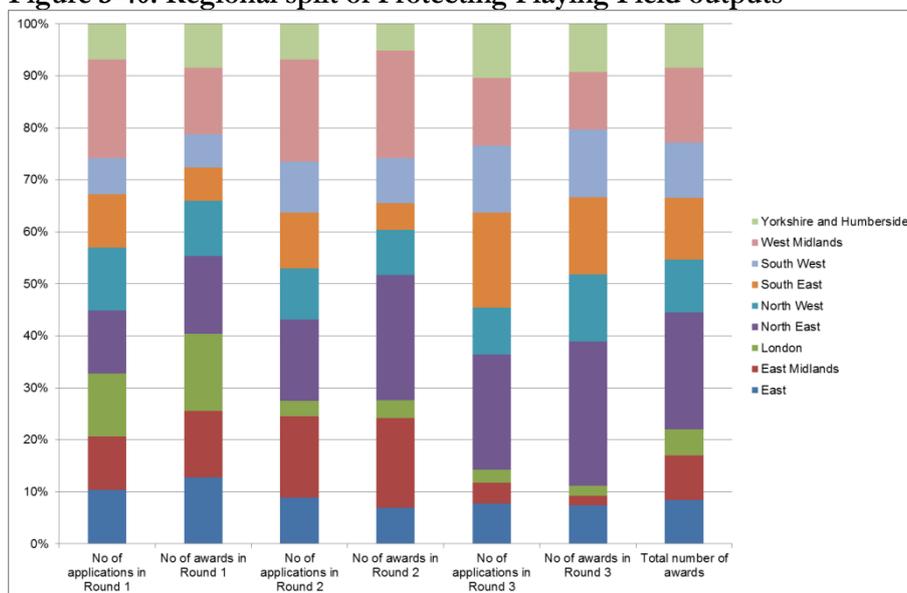
Source: Sport England, data to 31 December 2012

Figure 3-39: Regional split of Iconic Facilities outputs



Source: Sport England, data to 31 December 2012

Figure 3-40: Regional split of Protecting Playing Field outputs



Source: Sport England, data to 31 December 2012

The facilities, including the Olympic venues, PGTCs and Places People Play facilities have, and will continue to, generate a range of benefits for the communities in which they are located although the full impacts from the Olympic venues and Places People Play facilities are not yet known. However, given that these venues will cater to a range of local, regional, national and international visitors and sports people and will host a range of events, these venues should become fully embedded within the communities becoming an integral part of economic and social strategies and programmes.

(ii) Human capital – personnel

In addition to facilities, Games-related personnel were embedded within local communities across the UK, in the form of sport volunteers and coaches, contributing to wider social and economic benefits.

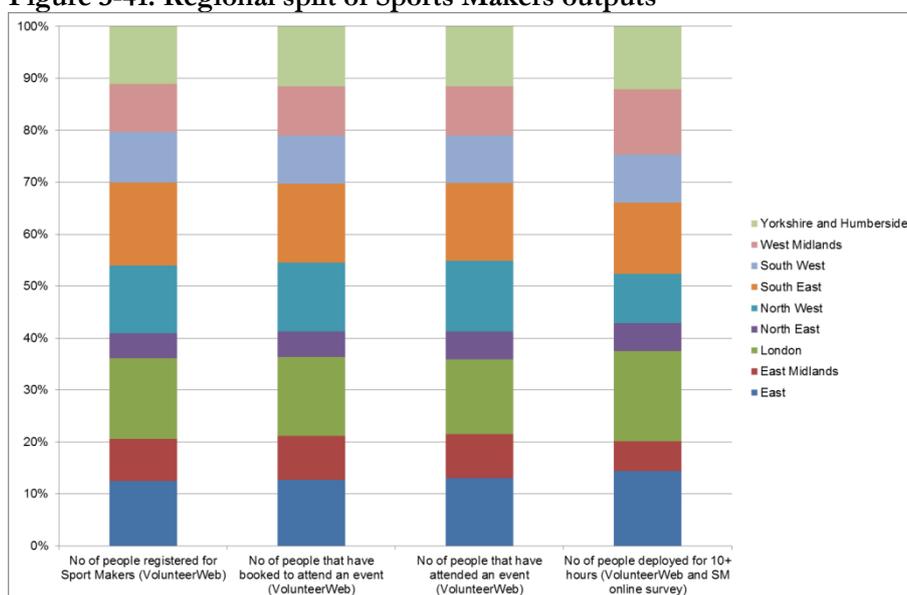
One of the key legacy programmes related to sporting personnel is Sport Makers which aims to use the inspirational pull of the Games to recruit, train and deploy 40,000 Sport Makers (16 years and over) across the country. These Sport Makers will then embed the Olympic and

Paralympic values throughout grassroots sport, becoming the next generation of sports volunteers to organise and lead community sporting activities.

Every Sport Maker will commit to at least 10 hours of volunteering, resulting in hundreds of thousands of volunteer hours to support the mass participation legacy. Sport Maker impacts have been recorded regionally (Figure 3-42). According to monitoring data as at 28 December 2012:

- 62,279 people had registered;
- 46,307 people had booked to attend an event;
- 38,660 people had attended an event; and
- 17,174 people had been deployed for 10 hours or more.

Figure 3-41: Regional split of Sports Makers outputs



Source: Sport England, data to 28 December 2012

With almost 90% of respondents indicating that they will continue to volunteer or lead in sport and the programme continuing, these Sport Makers should continue to have a beneficial impact on their communities.

(iii) Conclusion

There has been significant Games-related investment in venues, facilities and personnel, with evidence that this investment has resulted in a range of economic and social benefits for the communities in which they were located. This indicates that these facilities and personnel were embedded in the local communities and with the Places People Play programmes on-going these facilities should in time be fully embedded, contribute to wider programmes, strategies and ultimately benefits going forward.

Elite sport

3.11 To what extent and in what ways has hosting the 2012 Games been a catalyst for achievement in elite sport in the UK (including through identifying and nurturing talent)?

The key measure of elite sport achievement is medal success and with a successful performance at the 2012 Games (i.e. medal targets were exceeded), it can be concluded that the Games were been a significant catalyst for achievement in elite sport.

UK Sport set medal targets of between 40 and 70 medals for the 2012 Olympics and 95 to 145 for the Paralympics. Performance at both considerably exceeded the minimum target with outcomes towards the mid to upper target range, namely 65 medals won in the Olympic events and 120 in the Paralympic events.

UK Sport set medal targets of between 40 and 70 medals for the 2012 Olympic Games and 95 to 145 for the Paralympic Games. Performance at both considerably exceeded the minimum target – 65 medals were won in the Olympic events and 120 in the Paralympic events, with 20 of the 28 Olympic sports achieving or exceeding their individual targets. Team GB exceeded the target of finishing fourth place in the medal table by coming third. Paralympics GB also finished third, one place below the targeted second, though the significant movement within the top 10 countries (with the rise of China since 2000 and notably Russia and Ukraine more recently) meant that maintaining a top three place in the Paralympic medal table was considered a successful outcome (Figure 3-42).

Figure 3-42: Total Olympic and Paralympic medals top 10 (2000-2012)

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

Source: IOC/IPC websites

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

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

In seeking to address the how hosting the 2012 Games contributed to this elite sporting success (medals outcomes) at the Games, a suggested group of nine factors (or pillars) (listed below in Box 3-2) is used.⁶⁶

⁶⁶ This is based on the work of De Bosscher et al.

De Bosscher, V., Bingham, J., Shibli, S., Van Bottenburg, M., & De Knop, P. (2008) *The Global Sporting Arms Race: an International Study on Sports Policy Factors Leading to International Sporting Success*. Oxford: Meyer & Meyer

Box 3-2: Measures of investment and performance in elite sport delivery system

Financial support
 Integrated approach to policy development
 Participation in sport
 Talent identification and development system
 Athletic and post-athletic career support
 Training facilities
 Coaching provision and coach
 International competition
 Scientific research

These ‘SPLISS’ factors (sports policies leading to international sporting success) were used in the meta-evaluation to guide the analysis of elite sporting success, in particular the extent to which these factors were present (or not) before the baseline date of 2003. This allows the counterfactual to be established and where these factors were present, to establish the extent and ways in which they were enhanced in the post baseline period. This can be regarded as potential additionality⁶⁷. This is illustrated and summarised in Figure 3-43.

Figure 3-43: Critical success factors for the Olympics and their status pre and post the 2003 Baseline

	1996	1997-2000	2001-2004	2005-2008	2009-2012
Medal position	36th	10th	10th	4th	3rd
Financial Investment					
introduction of personal awards					
£200m. Increase announced					
Integrated Policy Approach					
World Class Prog Introduced					
Consolidation of world class prog under UK Sport					
Participation levels					
Post Games adult growth (new evidence)					
School age participation grows					
Talent ID					
TASS Scheme					
Cross sport TID innovations					
Post Athletic Career support					
ACE & Perf Lifestyle					
Enhanced Perf Lifestyle funding					
Training and Competition Facilities					
Lottery supported enhancement					
Olympic performance facilities opened					
Coaching					
Cunningham Review of coaching /EU initiatives					
Introduction of elite coach development programmes					
Promoting International competition opportunities					
Establish strategy for attracting major events					
Rapid increase in funding and events attracted					
R&D Investment					
Commencement of the Scheme					
Major increase in funding					

Following poor performance at the Atlanta Games in 1996 where GB reached an historic low (36th in the medal table), elite sport in Britain was transformed with an increase in financial support, from Government and lottery funding to UK Sport and NGBs, which, in particular:

- Facilitated the introduction of athlete personal awards; and

De Bosscher, V., De Knop, P., Van Bottenburg, M., & Shibli, S. (2006) A conceptual framework for analysing sport policy factors leading to international sporting success. *European Sport Management Quarterly*, 6(2), 185-215

De Bosscher, V., De Knop, P., Van Bottenburg, M., Shibli, S., & Bingham, J. (no date) *Sports policy factors leading to international sporting success*. London: UK Sport.)

⁶⁷ This in effect considers ‘circumstantial evidence’ of additionality if it is assumed that the enhancement of the SPLISS factors is a product of hosting the Games.

- Introduced GB's World Class Performance Programme (WCPP) with associated talent pathways through World Class Start and World Class Potential, to World Class Performance.

This identification of world class athletes together with athlete personal awards meant that those with real medal potential could have the opportunity to train full time, and to receive the professional support services of the National Institutes of Sport.

Each of these factors is discussed below, exploring the extent to which and in what ways has hosting the 2012 Games been a catalyst for achievement in elite sport in the UK.

(i) Financial support

In 2006, and as a direct result of winning the right to host the Games, financial support for elite sport increased by £200m which allowed investment in a range of programmes and initiatives to support elite sport performance. In addition following medal success at 2012, similar levels of funding have been committed for Rio, which was unlikely to have happened in the absence of the Games.

Financial support for elite sport is channelled through UK Sport, with this coming from three key sources:

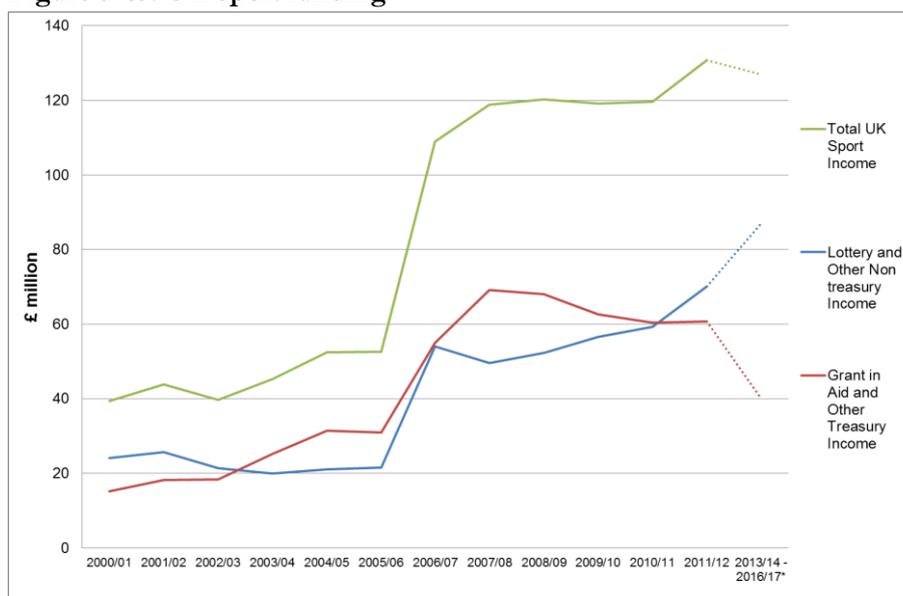
- Lottery Funding;
- Grant in Aid; and
- Other private income – although this funding is not significant, some NGBs benefit from their own sources of private income, such as sponsorship .

According to data from UK Sport, Lottery funding for elite sport⁶⁸ amounted to £21.5 million in 2002/03, with an additional Grant in Aid funding of £18.3 million – a combined total of £39.8 million in 2002/03.

A significant increase in funding was evident in 2006/07, when the Government announced in March 2006 that an additional £200 million of Exchequer funding would be made available, although this included a transfer of responsibility of functions (and funding) of the English Institute of Sport and the TASS from Sport England to UK Sport. This influx of additional funding represents the major impact of winning the bid for the 2012 Games on funding for elite sport and enabled UK Sport to begin funding all of the UK's Olympic and Paralympic sports (excluding the professional sports of football and tennis).

In the government's Comprehensive Spending Review for 2013-17, projected Exchequer funding (Grant in Aid) to elite sport was proposed to decline from £60.7m to £40m. However, this shortfall is to be compensated for by an increase in the share of Lottery funding to be allocated to UK Sport, and a projected increase in Lottery ticket sales. The projected income to UK Sport from Lottery sources is anticipated to increase to £87m per year as compared with the £70.05m for 2011/12 (Figure 3-43).

⁶⁸ Excluding the amount disbursed via Sport England in this period for World Class Start and World Class Potential

Figure 3-43: UK Sport funding

Source: For income 2000-12 see UK Sport Annual Reports and Financial Statements. For Prime Minister's announcement of projected funding levels for the Rio cycle (12 August 2012) see <http://www.uk-sport.gov.uk/news/Elite-athlete-funding-secured-to-ensure-the-gold-rush-continues-in-Rio-120812>

Note: * Projected

It seems reasonable to assume that in the tough economic context of the 2008-13 period, sport would not have attracted additional funding had it not been for the staging of the 2012 Games. It is not the funding per se that contributes directly to the enhanced performance of the elite system but the uses to which this funding is put in relation to the other SPLISS factors.

The post-2012 context is one in which a decline in funding in areas of public sector expenditure might be anticipated. However the significance of the London 2012 success and the centrality of public sector investment to achieving such success have been recognised by government with similar levels of funding committed to the end of the Rio cycle in support of the ambitious aspiration to improve on the London medal performance:

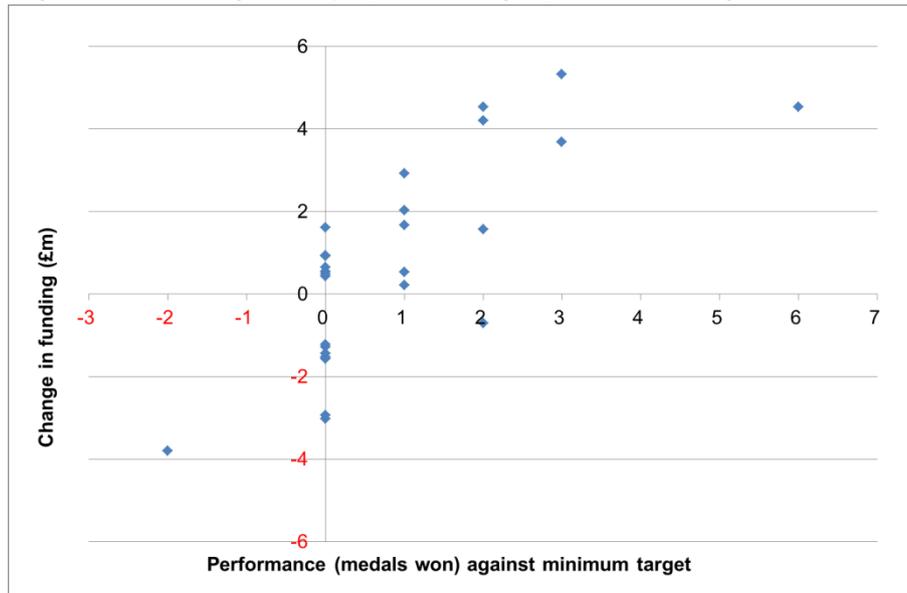
- Olympic sports – £264.1 million for the London Olympiad increased to £283.6 million for the Rio Olympiad (increase of £19.5 million); and
- Paralympic sports – £49.3 million for the London Olympiad increased to £71.3 million for the Rio Olympiad (increase of £22 million).

Figure 3-44 and Figure 3-45 show the correlation between 2012 performance and 2016 UK Sport funding by comparing performance against minimum targets (as set by UK Sport) against the change in funding between the 2012 cycle and the 2016 cycle.

With the exception of judo, all the Olympic sports which obtained one medal more than their minimum target have seen an increase in their funding going forward to Rio 2016. Boxing, equestrian and cycling have seen the largest increases in funding (£5.3m, £4.5m and £4.5m, respectively), these three sports exceeded their minimum target by three, two and six medals respectively.

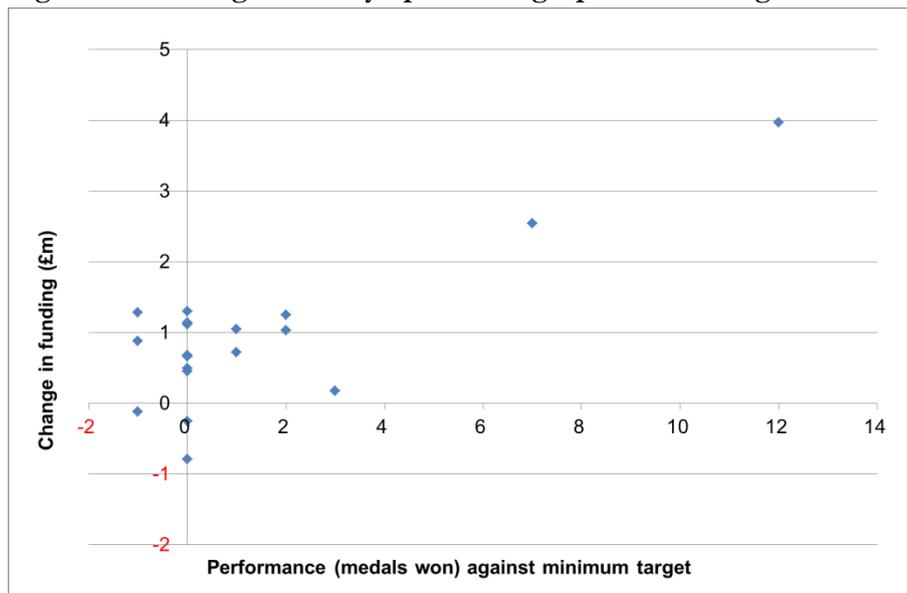
Only three Paralympic sports (volleyball, powerlifting and archery) have had their funding reduced going into the 2016 Rio cycle. All other Paralympic sports have seen an increase in funding with disability athletics and para-cycling obtaining the greatest increase in funding (£2.2m and £4m, respectively). This is clearly linked to performance as both disability athletics and para-cycling performed well above their minimum target, exceeding it by 12 and seven medals respectively.

Figure 3-44: Change in Olympic funding v performance against minimum target



Source: UK Sport

Figure 3-45: Change in Paralympic funding v performance against minimum target



Source: UK Sport

(ii) Integrated approach to policy development

Although the policy context for elite sport was set prior to winning the right to host the Games, the Games acted as a catalyst to ensure that the policy framework supported elite sport performance.

The WCPP was introduced in 1997, following the poor performance in Atlanta in 1996. In 2006 UK Sport consolidated the former Sport England operated World Class Start and World Class Potential programmes with the UK Sport’s World Class Performance Programme into a single framework operating at three levels:

- **Podium:** Supporting athletes with realistic medal winning capabilities at the next Olympic/Paralympic Games (i.e. a maximum of four years away from the podium);
- **Development:** Comprising of athletes whose performances have suggested that they have realistic medal winning capabilities and newly funded sports that are demonstrating the ability to be competitive; and

- **Talent:** Designed to support the identification and confirmation of athletes who have the potential to progress through the World Class pathway with the help of targeted investment.

This brought under one body responsibility for elite athlete support, elite coach, sports science, and sports medicine, talent identification and development, bidding to stage world class events, oversight of the performance of NGBs through the modernisation programme, and other services. This consolidation, although it took place after the baseline date of 2003, was proposed before the winning of the bid to host 2012. However the case became more compelling given the level of urgency to perform to target outcomes in 2012.

UK Sport indicates that this resulted in a simpler more efficient system with ease of progression, and is seen as a major factor in the improvement of UK performance.⁶⁹ In addition, in UK Sport's annual survey of athletes "*Two-thirds of the sample (66%) agreed that there was a coordinated approach to coaching and other types of support within their sport's WCP; Podium-level athletes were more likely to agree with this proposition than their Development-level peers (72% v 64%)*".⁷⁰

(iii) Talent identification and development system

Although talent identification was largely in place prior to London winning the right to host the Games, the volume of support and the development of cross-sport initiatives were accelerated as a result.

There are a wide ranging suite of programmes broadly relating to talent identification including:

- **Talented Athlete Scholarship Scheme (TASS):** TASS was initiated in 2004 and has been a partnership between young athletes, NGBs and Higher and Further Education sectors. It will have been supported financially by UK Sport from 2005 to 2013/14, after which time UK Sport funding will be discontinued.⁷¹ By 2012 TASS had invested over £28 million in athletes and the supporting network around them, providing up to 6,000 awards delivered at seven educational institutions, with 13 hub universities. TASS enabled thousands of talented athletes to fulfil their sporting potential and become medal winners of the future, specifically:
 - 21 of the British Medallists in Beijing in 2008 were current or former TASS Athletes;
 - The only GB medallist in Vancouver at the Winter Games was TASS Alumnus Amy Williams;
 - 55 TASS supported Athletes won 85 medals at the recent Commonwealth Games in Delhi;⁷² and
 - 200 TASS Athletes and Alumni competed at London 2012, 44 of them winning a medal, with 10 being multi-medallists – 15 gold, 15 silver and 27 bronze medals (33 Olympic, 24 Paralympic)
- **University scholarships** awarded by individual institutions. 58% of Team GB in Beijing who took home 50% of the medals were university students and graduates, indicating the role university scholarships can play for some individuals. University sports scholarships have in some cases increased in variety, number and value since the announcement of the London 2012 bid however attempts to obtain details thereof proved unsuccessful as many of the universities regard this as sensitive information in terms of their competitive position.

⁶⁹ UK Sport (2010) *Making the Case for Elite Sport: Evidence and Research to Demonstrate the Impact and Wider Effect of UK Sport's Activities and Responsibilities* (unpublished)

⁷⁰ UK Sport (2010) *Athletes Survey*

⁷¹ In December 2012 UK Sport announced that its funding for TASS would be wound down. 2012/13 investment would continue in the pattern developed since 2005, but for 2013/14 investment by UK Sport would be reduced from £2.23 m. to £1.07 m. and would be limited to support for 64 Winter Olympic sports athletes in preparation for the Sochi Games. Retrieved 28 March 2013, from <https://www.tass.gov.uk/news/2012/12/uk-sport-funding-tass.html>. Other sources of funding are currently being sought however the future of TASS remains uncertain at this point.

⁷² TASS (2011) *Helping Talent Shine in Education and Sport*

- **UK Talent initiatives:** The UK Talent Team was established in 2006 as a working collaboration between UK Sport and the English Institute of Sport. From 2007 to 2012 it supported 20 Olympic and Paralympic sports, ran seven national athlete recruitment campaigns, assessing over 7,000 athletes.

According to UK Sport, these campaigns have identified over 100 athletes (11 represented Great Britain at London 2012) who entered the World Class Programme across 17 sports. These athletes account for 239 international appearances; and 102 international medals of which 74 were at major championships, with 2 Olympic medals and 1 Paralympic medal.

According to the UK Talent Team "*The inspiration of the home Games in 2012 has been a huge catalyst for this work*".⁷³

(iv) Athletic and post-athletic career support

The Games resulted in better athletic and post-athletic career support which has in turn supported achievement in elite sport.

The major vehicle for delivery of athletic and post-athletic career support for those on the WCPP is the Performance Lifestyle service. Although established in 2003, major enhancement of the programme only occurred in 2009 with £900,000 of additional funding which allowed for the appointment of additional Performance Lifestyle Advisors (up from 8 to approximately 15 full time equivalents). The role of Performance Lifestyle Advisor was defined and recognised (independently of the generic Athlete Support Manager role) and funding was ring-fenced or allocated for this rather than these services being bought in by sports on a 'needs' basis.

Evaluation of the impact of the programme on athlete performance, health and well-being in the post 2012 Games context, where athletes will have been subject to the new system and its impact will be important, however results are not yet available.

NGB post-Games Survey data⁷⁴ however suggests an overall positive impact of the 2012 Games on support for athlete career development with 72% assessing the impact as either strongly positive (17%) or positive (55%).

(v) Training facilities

Investment in training facilities as a result of the Games have supported achievement in elite sport through providing world class facilities which provide training opportunities and venues to host major sporting events.

According to the NGB post-Games survey⁷⁵ 55% of respondents indicated a positive (34%) or strongly positive (21%) impact of London 2012 on training facilities.

In addition the presence of world class facilities already has and will facilitate the promotion of bids to stage major international events which will bring with them further opportunities to promote GB elite sporting success.

Improvements undertaken for the PGTCs may also benefit elite sport preparation in the future, with significant investment in facilities, including the Olympic pools in Southend and Corby, providing facilities to support elite training.

(vi) Elite coach and leadership development

The elite coaching programmes were largely since 2003, and the Games acted as a catalyst for these programmes with momentum growing once London won the right to host the Games.

The suite of initiatives to develop world class support include:

⁷³ UK Sport (2011) *Talent Identification, Confirmation and Development – finding Britain's future Olympic and Paralympic champions*

⁷⁴ See *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base*

⁷⁵ See *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base*

- **Elite Coach Programme:** designed for coaches operating in a world class performance environment tailored to the specific needs of each individual coach. It has had four intakes from 2004 to 2012 with 32 graduates;
- **Elite Coach Apprenticeship** scheme: aimed at those coaches emerging on the world class performance landscape. Twelve coaches had benefited from this programme by 2012;
- **Fast Track Practitioner Programme:** aimed at those from coach-related and sport science support areas who are starting out on a career in elite sport support. Over 100 practitioners have been through the programme;
- **International Leadership Development Programme:** Established in 2006 to provide participants with the skills required to work effectively in an International Federation or similar sporting body. In the first three years of operation, 36 people graduated of whom 17 currently hold posts of influence within international federations.

In addition to the International Leadership Programme, in 2009/10 UK Sport invested £555,000 in 33 NGB International Influence Strategies (an average of £16.8k per NGB). 62 individuals were elected, re-elected or appointed to positions of influence in international sporting bodies in 2009.

NGB research respondents⁷⁶ commented positively on the value of the elite coach development programme, seeing this as a positive step in developing greater available elite competence.

(vii) International competition

The Games have acted as a catalyst for international competition attracting more events since 2003. This is discussed in detail in section 3.16.

(viii) Scientific research

Funding for scientific research grew significantly in 2006/7 as a result of the Games with this further supporting elite performance.

The key programme related to scientific research is the UK Sport Research and Innovation programme engaged in a range of projects which have made direct contributions to the enhancement of performance, particularly in key medal winning sports in Beijing and London.

Funding for the period pre-2005 stood at approximately £750,000 per annum but rose to approximately £2 million in 2006/07. In addition support raised both in cash and in value in kind, from partners represented 200% of the value of funding provided by UK Sport.

NGB interviewees⁷⁷ from a range of sports cited a number of projects undertaken with support from the Research and Innovation team, including sports which did not necessarily have sophisticated equipment technology requirements as well as those which clearly did. In addition 62% of NGB respondents indicated that winning the bid to host London 2012 had had a positive impact on the respondent's sport scientific research activity.

(ix) Conclusion

In summary, the SPLISS factors represent policy elements which had been identified and acted upon in the elite sport system in GB before the 2003 baseline, but were all enhanced in important ways in the years immediately prior to 2012, facilitated by the extra financial resources provided.

Britain's improved position on the Olympics medal table and continued good performance in the Paralympics can be reasonably attributed in part to the actions undertaken as a product of the enhanced funding and focus from hosting the Games, whether this be a more efficient and

⁷⁶ Grant Thornton (2013) *National Governing Body Research Report* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex B*)

⁷⁷ *Ibid*

‘joined up’ World Class Performance pathway; enhanced and new (particularly cross-sport) talent identification initiatives; improved athlete performance lifestyle support; improved elite coaching and athlete support services; greater access to world class events (and in particular the hosting of such events in the UK); or enhanced scientific research and innovation.

In these respects there is good evidence to support the claim that hosting the Games have a strong positive impact on performance, and that the ways in which such performance improvement was achieved are broadly understood, though they may vary from one sport, discipline, event or athlete to another. The level of protected funding through to the end of the Rio cycle should enable Britain to resource and refine such initiatives in the ambitious aspiration to improve on its London medal performance.

3.12 To what extent has there been an increase in young, talented disabled athletes being identified and nurtured (from school to elite competition level), as a consequence of the 2012 Games?

The identification and development of young, talented disabled athletes is crucial in developing a sustainable high performance system in the UK with evidence indicating that the Games did result in young talented disabled athletes being identified and nurtured.

A number of talent identification and development programmes were initiated in preparation for the 2012 Paralympic Games with the principal talent identification and development programmes relating to Paralympic and disability sport being:

- Playground to Podium; and
- Talent 2012: Paralympic Potential.

In addition, the School Games provided opportunities for disabled school children to participate in competitive sport.

In the absence of detailed evaluation data on Playground to Podium and Talent 2012: Paralympic Potential it is difficult to determine the exact extent to which there has been an increase in young, talented disabled athletes being “identified and nurtured as a consequence of the 2012 Games”.

However the following evidence does indicate that the Games have identified and nurtured young, talented disabled athletes:

- Playground to Podium:
 - The Playground to Podium initiative which focused on six sports (athletics, boccia, football, swimming, table tennis, and wheelchair basketball) is estimated by Sport England to have identified “*at least 15 young disabled people a year per school sport partnership who demonstrate a high ability in generic skills. ... [and who were] invited to attend the County Athlete Assessment coordinated by English Federation of Disability Sport and development centres*”;⁷⁸
 - Two athletes identified by Playground to Podium (Sophie Kamlis and Jamie Carter) were selected for Paralympics GB to compete in the T44 and T34 100m and 200m sprints at London 2012; and
 - Disability Swimming and Wheelchair Basketball reported that Playground to Podium had been an effective source of talent identification. According to Disability Swimming Playground to Podium provided £0.74m of funding in 2009-2013 with nine of the 2012

⁷⁸ Sport England (2012) *Playground to Podium*. See http://www.sportengland.org/support__advice/playground_to_podium.aspx

team members coming through this programme all of whom made at least one final at the 2012 Paralympic Games⁷⁹.

With the Playground to Podium programme being cut some NGBs expressed concerns that there may be a potential reduction in future talent development.

- Talent2012 Paralympic Potential:
 - A short term programme at the elite level introduced in December 2009 which identified 34 athletes across 11 Paralympic sports within 12 months who were selected for intensive preparation for potential inclusion in the Paralympics. Nine members of the Paralympic team came through this route with two athletes, Jon-Alan Butterworth and Karen Darke, winning three silver medals in cycling; and
 - GB's youngest Paralympian, Gabi Down, participated in the School Games in 2012 within its expanded programme of Paralympic Sports which provides a route for junior elite development.
- School Games Level 4 Disability Sport:
 - The first School Games national event gave 167 talented young disabled athletes (11.6% of the total athletes) the chance to compete at the Olympic Park. Prior to this, from 2006 to 2011 a UK School Games event was held, with Paralympic medallists Jonny Peacock, Ellie Simmonds and Hannah Cockcroft all having been participants in this.

Thus, while the limited evidence available identifies that there been an increase in young, talented disabled athletes being identified and nurtured (from school to elite competition level), as a consequence of the 2012 Games. However Playground to Podium and Talent 2012 have both been discontinued with no future programmes specifically targeted at identifying and nurturing disabled athletes from school to elite level yet identified.

3.13 To what extent have elite UK sporting achievements (as a consequence of the 2012 Games and legacy investments) impacted on national pride and well-being?

A strong positive sporting performance can impact on national pride and well-being. Following a strong performance at the Olympic and Paralympic Games in London 2012, evidence indicates that these achievements have increased national pride and well-being.

There are three key evidence sources each of which is discussed below.

For the past four Games, UK Sport has commissioned pre and post Games surveys of the relationship between the public's views/ sporting preferences and Olympic performance, with questions included in 2012 related to national pride in the form of a "sense of Britishness".

In 2012, prior to the Games 45% of survey respondents indicated that they agreed that the London Games would create or heighten a sense of 'Britishness' among the UK population, increasing to 68% post-Games (Figure 3-46).^{80 81} Although not explicitly quantified GB's performance at the Games would have been one of the factors resulting in the 23% increase in national pride.

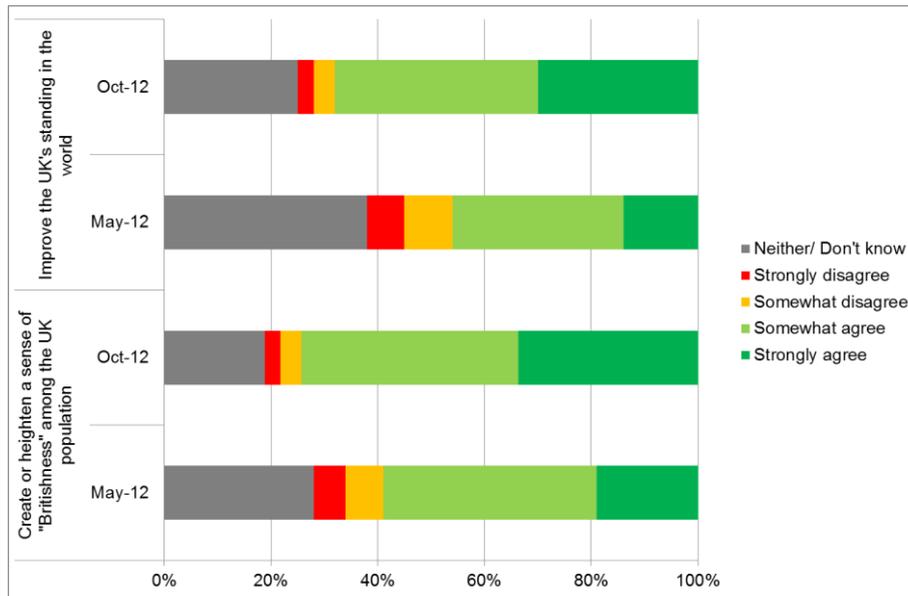
UK's standing in the world. Prior to the Games 31% indicated that it would, doubling to 62% after the Games. Once again GB's performance at the Games is likely to be a factor in this significant increase.

⁷⁹ Grant Thornton (2013) *National Governing Body Survey* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex B*)

⁸⁰ UK Sport (2012) *UK Sporting Preferences*

⁸¹ A breakdown by age, gender, socio-economic status or ethnic group was not provided in this document.

Figure 3-46: To what extent respondents feel that the Games creates or heightens a sense of "Britishness" among the UK population and improves the UK's standing in the world

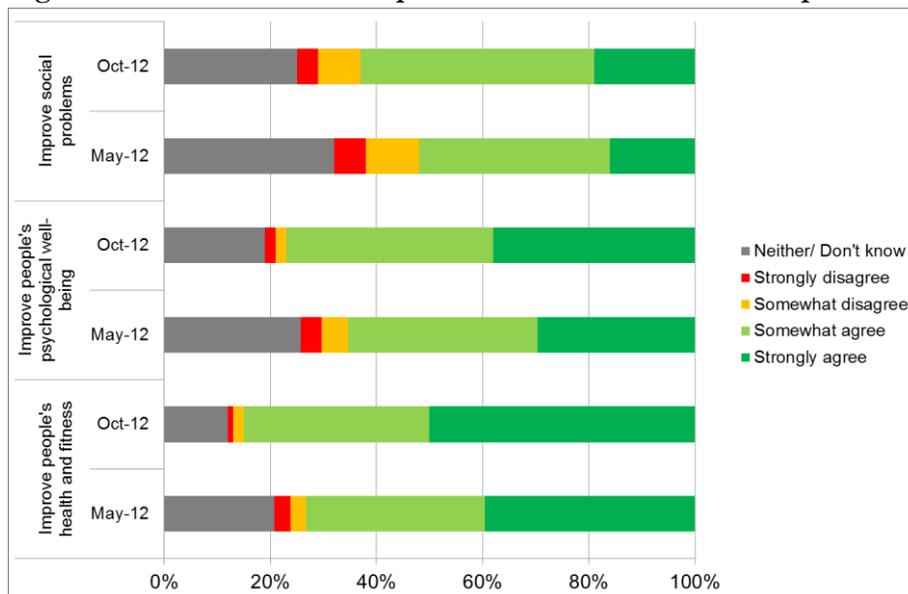


Source: UK Sport Sporting Preferences 2012

Respondents' perceptions of the impact of the Games on well-being related social benefits were also significantly higher post-Games:

- Improve people's health and fitness, net agree – 68% pre-Games, 83% post-Games;
- Improve people's psychological well-being, net agree – 58% pre-Games, 72% post-Games;
- Improve social problems, net agree – 35% pre-Games, 51% post-Games.

Figure 3-47: To what extent respondents feel that the Games improves social benefits



Source: UK Sport Sporting Preferences 2012

Thus there was a considerable shift in opinion indicated from pre to post-Games indicating that the Games, including the 2012 elite UK sporting achievements, impacted on national pride and well-being.

This is further supported by a Taking Part survey post-Olympic report which indicates that those respondents indicating a sense of pride in British sporting achievements were 88% more likely to support the hosting of the Games by London than those who did not.

While not as robust as UK Sport and Taking Part survey data, media polls do also provide some insight into the extent to which sporting achievements at the Games impacted national pride and well-being.

A BBC/ Globescan Survey⁸² published in January 2012 reveals that 50% of UK respondents indicated that Olympic performance affects national pride (either 'a lot' (20%) or 'some' (30%).

Data relating to enhanced national pride following GB's 2012 performance was also reported in the results of a survey conducted by OnePoll⁸³, which indicated that while 73% expressed some level of cynicism about the Games before they began, for 85% of those this was replaced by a genuine sense of pride following Team GB's success in the 2012 Olympic Games.

Econometric research⁸⁴ on Taking Part survey data indicates that overall there had been a longer term increase in happiness (well-being) in 2012. Although there are a wide range of influences on happiness, given that evidence indicates that sports participation impacts on the wellbeing of individuals, with the Games having impacted on participation (with the largest motivational effect during the Games) it follows that it should in turn have impacted on well-being.

Thus evidence indicates that GB's strong positive sporting performance at the Games did increase national pride and well-being with sustainability of this will to be revealed over time

International

3.14 To what extent has sport been used to achieve international development goals through the 2012 Games, specifically by providing more young people in developing countries with the opportunity to participate in high quality sport through International Inspiration?

International Inspiration has used sport to achieve international development goals through the 2012 Games, by providing opportunities for 11 million children and young people in developing countries to participate in high quality sport. In addition, PGTCs have also contributed to participation opportunities through forging relationships between institutions in the UK and organisations in developing countries.

These are discussed in additional detail below providing an indication of the extent to which sport has been used to achieve international development goals.

(i) International Inspiration

International Inspiration was announced by the then Prime Minister in India on 21 January 2008, bringing into reality the 'Singapore Vision', i.e. 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*".⁸⁵

⁸² Mower, J (2012) 'London 2012: Olympic success is key to National Pride' BBC News World. Accessed on 27 March 2013 from <http://www.bbc.co.uk/news/world-16245075>.

⁸³ Freeview (2012) research shows a huge surge in national pride following 'unprecedented sporting achievement' <http://www.freeview.co.uk/Press/2012/Research-shows-a-huge-surge-in-national-pride-following-unprecedented-sporting-achievement>

⁸⁴ Dr. Paul Downward, Dr. Peter Dawson and Professor Terrence Mills (2013) *The Impact of the Olympic Games on Sport Participation, Motivation, Health and Well-Being* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base*)

⁸⁵ UK Sport website

The aim of the programme is to reach 12 million children in 20 countries by 2014, enriching their lives through the power of high quality and inclusive physical education, sport and play. This will not only deliver the ambitions promised in Singapore but will also set the foundations for a true international legacy from the 2012 Games.

International Inspiration has received the formal backing of the International Olympic Committee and the International Paralympic Committee. This is the first time an Olympic Games Organising Committee has undertaken an international legacy programme of this kind.

It is funded mainly through the International Inspiration Foundation, with UK Sport, the British Council and UNICEF leading delivery, working with local in-country partners to deliver the programme across the 20 countries as well as the UK.

Although UK Sport was involved in sport development internationally prior to International Inspiration, evidence indicates that there was very little activity before International Inspiration.

Increased sport and physical activity participation opportunities for children and young people have been brought about due to interventions aimed at three levels:

- Government and policy makers;
- Delivery infrastructure, including schools, sport clubs and practitioners; and
- Participants – children and young people.

In many of the countries, participation in sports and physical activity by some groups, specifically girls and disabled children and young people, was and in many cases still is a challenge with policies not facilitating this, and a lack of trained practitioners and suitable facilities and programmes compounding the issue. Although impacts of International Inspiration on these groups (specifically girls and disabled children and young people) have not been quantified where evidence of benefits exists it has been indicated below.

Participants

As of August 2012, at least 11 million children and young people had been engaged (improved PE lessons or regular sport) or reached (one-off events) through International Inspiration, and expectations are that the programme will meet and exceed the target of reaching 12 million young people by 2014.⁸⁶

Of the 11 million children, 6.2 million had been engaged in regular PE or sport with 4.8 million children reached through a one-off event (Figure 3-48).

Figure 3-48: Children and young people reached by International Inspiration, to August 2012

	Country	Started	Child and Young People Engaged	Child and Young People Reached	Total Child and Young People Engaged and Reached
1	Brazil	2007	2,058,904	505,527	2,564,431
2	India	2007	2,719,613	3,140,966	5,860,579
3	Azerbaijan	2007	57,838	114,668	172,506
4	Zambia	2007	148,638	152,583	301,221
5	Palau	2007	3,100	0	3,100
6	Bangladesh	2009	408,094	459,595	867,689
7	Jordan	2009	251,340	0	251,340
8	Mozambique	2009	215,849	9,000	224,849
9	Trinidad and Tobago	2009	5,635	9,107	14,742

⁸⁶ Ecorys (November 2012) *Interim Evaluation of International Inspiration*

	Country	Started	Child and Young People Engaged	Child and Young People Reached	Total Child and Young People Engaged and Reached
10	South Africa	2009	32,747	33,253	66,000
11	Nigeria	2009	197,010	74,340	271,350
12	Malaysia	2009	107,500	0	107,500
13	Turkey	2010	8,421	95,293	103,714
14	Indonesia	2010	37,459	36,905	74,364
15	Pakistan	2010	30,504	140,004	170,508
16	Tanzania	2011	0	18,512	18,512
17	Uganda	2011	0	8,589	8,589
18	Ghana	2009	0	6,851	6,851
19	Ethiopia	2011	0	5,510	5,510
20	Egypt	2011	22	101	123
	TOTAL		6,282,674	4,810,804	11,093,478

Source: *Ecorys (November 2012) Interim Evaluation of International Inspiration*

It should be noted that participation by country does vary for a variety of reasons, from when countries joined the programme, to the size of the country and the scale and type of activity undertaken.

Policies

These participation opportunities have been brought about as a result interventions aimed at the children and young people and at government and policy makers as well as the delivery infrastructure (practitioners, schools and communities).

At a government/ policy level, by end August 212 International Inspiration had engaged 700 policy makers with 36 policies across 12 countries influenced. These changes to education and school sport policies and related legislation have been followed by improvements to curricula and teaching resources with two thirds of all policies at implementation stage. These are discussed in further detail in section 3.15.

Infrastructure

Delivery infrastructure is key to providing children and young people with the opportunity to participate in regular sport and PE. As a result of International Inspiration:

- 124,896 individuals across 20 countries have been trained, of which 28,530 were young leaders (Figure 3-49), exceeding the target of training 20,000 practitioners by 2014. This has enabled teachers and coaches to deliver PE and sport in a more structured and appealing way, fully inclusive, especially to disabled people and girls. Young leaders have used their skills to establish sports clubs and festivals to help teachers deliver PE lessons.
- 564 schools across 19 countries (plus the UK) are now engaged in mutually beneficial relationships (against an end of programme target of 600);
- 180 safe spaces⁸⁷ created across five countries (against a programme target of 60);
- 44 national sports federations across 16 countries and ten different sports have developed new strategies and/or reported new partnerships (against a programme target of 60);
- 978 community based events have been delivered across seven countries (against a programme target of 200); and

⁸⁷ A safe space is a secure and safe environment in terms of the design of a physical space and the operations of the space for children to participate in sport and play.

- 14 advocacy campaigns have been delivered across nine countries (against an end of programme target of 20).

Figure 3-49: Number of adults and young people trained by country

	Country	Started	Adults trained	Young People Trained	Total
1	Brazil	2007	43,829	744	44,573
2	India	2007	35,226	850	36,076
3	Mozambique	2007	4,928	662	5,590
4	Bangladesh	2007	2,311	16,432	18,743
5	Zambia	2007	2,268	2,044	4,312
6	Azerbaijan	2009	1,959	387	2,346
7	South Africa	2009	1,199	3,929	5,128
8	Pakistan	2009	813	168	981
9	Nigeria	2009	657	1,204	1,861
10	Trinidad and Tobago	2009	600	460	1,060
11	Jordan	2009	587	470	1,057
12	Ghana	2009	500	20	520
13	Malaysia	2010	416	340	756
14	Tanzania	2010	410	300	710
15	Indonesia	2010	364	305	669
16	Turkey	2011	135	58	193
17	Ethiopia	2011	67	45	112
18	Uganda	2009	60	45	105
19	Egypt	2011	30	45	75
20	Palau	2011	7	22	29
	TOTAL		96,366	28,530	124,896

Source: Ecorys (November 2012) *Interim Evaluation of International Inspiration*

Although not quantified at this stage, evidence indicates that International Inspiration has:

- Facilitated the inclusion of more girls and children who are disabled to participate in sport;
- Boosted attendance at school, through for example providing new opportunities to take part in exciting sporting activity;
- Improved relationships between different pupils and pupils from different schools – largely through the efforts of sports festivals delivered by young leaders;
- Improved educational attainment, through increased sport participation e.g. by boosting self-esteem; and
- Promoted cultural awareness.

(ii) Pre-Games Training Camps

While International Inspiration is the key international legacy programme, other programmes and investments have also helped to drive the international agenda, for example relationships and activities formed as part of the PGTCs.

A survey of PGTCs⁸⁸ indicates that these camps resulted in a range of benefits including economic impacts, infrastructure improvements and a range of wider social benefits including

⁸⁸ Department for Culture, Media & Sport (2013) *Pre-Games Training Camp Survey* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex: C*)

increased pride in the local area, improved connections to visiting nations, promotional opportunities, increased profiling, both regionally nationally and internationally.

Universities in the UK have facilitated the development of sport internationally through partnerships formed with organisations in countries around the world. The PGTCs provided an opportunity for new partnerships to be formed, or existing partnerships to be expanded and strengthened. Although the impacts of these partnerships have not been fully quantified or evaluated, two examples include:

- **University of Bristol – Kenya:** This was originally set-up between the University of Bristol and Kenya in 2007 when the university agreed to host the Kenya Olympic team. It was later expanded to include University of West England in Bristol, Bristol City Council, Filton College and professional sports clubs in Bristol. Activities included coach and athlete exchanges, twinning primary and secondary schools and volunteering opportunities. A charity, Umoja Bristol-Kenya Partnership has been set up demonstrating a longer-term legacy associated with the Bristol hosting the Kenyan Olympic team;
- **University of Gloucestershire – Malawi:** Sport Malawi was set up in 2008 by the University of Gloucestershire to help Malawi to enhance its sporting infrastructure. The project uses sport as a vehicle for social change with a focus on youth, health, disability, gender and human rights.

(iii) Conclusion

It is still relatively early to assess the extent to which International Inspiration will leave a lasting legacy for children and young people, however of the 11 million children that have been involved, 6.3 million have benefitted through improved PE and regular sport.

In addition if the improved policy landscape and better provision of PE and sport does continue beyond the lifetime of International Inspiration, it is reasonable to assume that children and young people who have gained a greater interest in and access to PE and sport are likely to continue to derive the benefits detailed above, including greater participation in sport and physical activity.

3.15 How far has the UK been able to increase its influence on the role of sport in other countries, and on global sporting decisions, because of the 2012 Games or its legacy interventions?

International Inspiration has through its various activities and initiatives influenced the role of (and delivery of) sport in 20 other countries.

(i) Influence on the role of sport in other countries

Within many International Inspiration countries a challenging policy context environment which did not recognise or acknowledge the value of PE and sport, compounded by poor policy coordination resulted in a lack of trained personnel, equipment and interest in supporting the delivery of sport for development on the ground.

To assist in addressing these challenges, International Inspiration targeted governments and policy makers through a range of activities (e.g. setting up steering committees and partnerships, running conferences, events and workshops and providing training, technical guidance and research) to help facilitate a change in the role of sport in these countries.

This has resulted in:

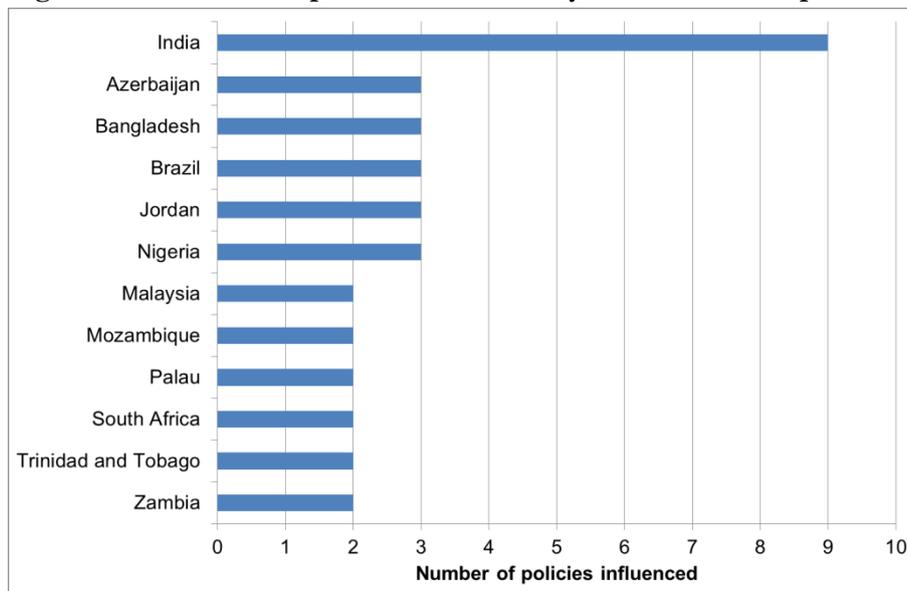
- Policy changes in 12 of the International Inspiration countries;
- Partnership working between schools – 564 schools across 19 countries (plus the UK) are now engaged in mutually beneficial relationships;
- Partnerships and strategies formed – 44 national sports federations across 16 countries and ten different sports have developed new strategies and/or reported new partnerships; and

- Advocacy programmes – 14 advocacy campaigns have been delivered across nine countries.

As at August 2012, 700 policy makers had been engaged with 36 policies influenced in 12 countries by International Inspiration (Figure 3-50). It should be noted that since countries joined the programme at different times, progress varies and some countries which have only recently joined the programme are yet to record any policies influenced.

This exceeds the target of influencing 20 national policies during the life time of the programme.

Figure 3-50: Number of policies influenced by International Inspiration by country



Source: Ecorys (November 2012) *Interim Evaluation of International Inspiration*

Policies influenced include the development of new policies or the improvement of existing policies with these covering a range of areas including education or school sports policies and related legislation, curricula or teaching resources, coach educational resources and teacher and young leader training resources. Of the 36 policies, two thirds are currently being rolled-out (Figure 3-51).

Figure 3-51: Policies influenced by International Inspiration

Type of policy	Policy stage			Total
	Design	Pilot	Roll-out	
Education or school sport policy and legislation	5	0	6	11
Sports policy and legislation	1	0	3	4
Curriculum and teaching resources	3	1	5	9
Coach education resources	0	0	6	6
Teacher training resources	0	0	2	2
Young leader training resources	1	1	1	3
Other	0	0	1	1
Total	10	2	24	36

Source: Ecorys (November 2012) *Interim Evaluation of International Inspiration*

(ii) Influence on global sporting decisions

One of the ways in which the UK can increase its influence on global sporting decisions because of the 2012 Games is through representation on international sport bodies, federations and boards.

According to UK Sport, the Games has had a positive impact on the UK's level of representation internationally. Four British officials were elected to the International Federation

boards for triathlon, sailing, modern pentathlon and hockey. In addition, four LOCOG employees have also achieved higher administrative positions.

UK Sport's International Leadership Programme (ILP) (section 3.11) also provides some insight as this has international objectives, providing opportunities for high potential people who either volunteer to represent their sport's NGB at International Federation meeting abroad, or who are young professionals targeting a career in sports governance within their NGBs. In the first three years of operation, 36 people graduated of whom 17 currently hold posts of influence within international federations although the extent to which the ILP participants influence sport internationally is currently not known.

(iii) Conclusion

Evidence suggests that International Inspiration is making good progress in terms of catalysing new or improved policies for PE and sport with the principal mechanisms for influencing policy makers and policies through bringing the partners together to map, consider and to help improve existing policies, and also through piloting new resources and demonstrating their success.

Given that the programme still has another year of formal implementation, and with the new policies, coupled with partnership working between schools, national sports federations strategies and/or reported new partnerships and advocacy programmes in the International Inspiration countries, role of sport in other countries will continue to be influenced.

3.16 To what extent have the 2012 Games enhanced the reputation of the UK abroad for hosting major sporting events (and made it easier for the UK to win and host future major events)?

There is significant evidence which indicates the extent to which the Games have impacted on the UK's reputation, with a detailed discussion on the impacts on investment, tourism and other factors included in Section 5.

The Games have significantly enhanced the UK's reputation abroad for hosting major sporting events, with the successful delivery of the Games seen as showcasing London, and the wider UK as a sports events destination.

This section explores the extent to which the Games impacted on the number of events hosted, potential impacts due to reputational enhancements of the UK as a sport events destination and on-going support for events.

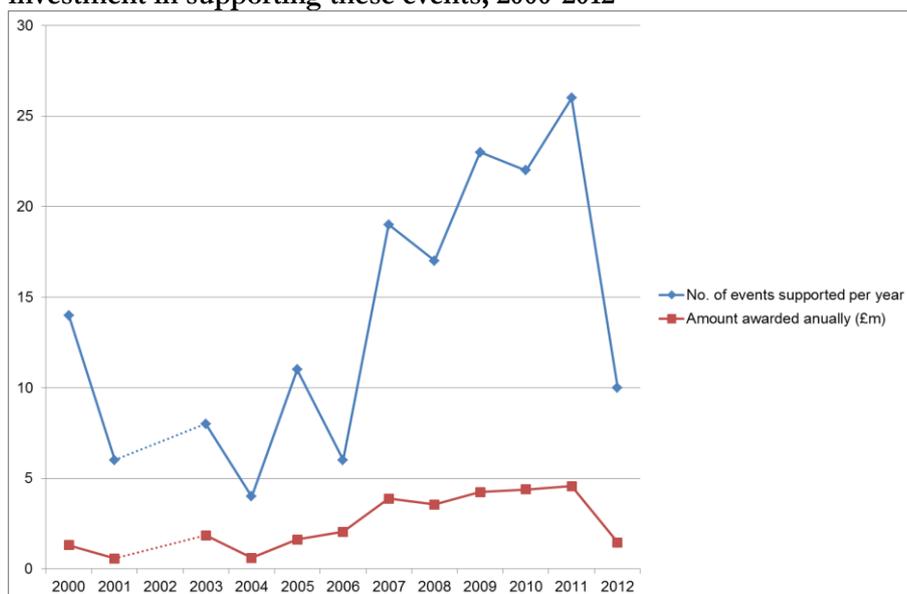
(i) Number of events hosted

In order to determine the impact of the 2012 Games on hosting major events, the volume, quality and range of world class events (i.e. world championships and major international competitions) attracted to the UK in the period up to 2003 are contrasted with those hosted post-2003.

During the period 2000-2003 an average of 9.3 events per year were supported, compared to 15.3 events per year over the 2004-12 period, with an understandable reduction in 2012 itself with effort focused on the Games (Figure 3-52).⁸⁹ This indicates an acceleration of effort in securing events after securing the right to host the Games. Investment also increased after 2003, with a significant acceleration post 2006.⁹⁰

⁸⁹ UK Sport (2012) *World Class Events: Past Events*. Available from <http://www.uk sport.gov.uk/pages/2007-2012-Events/>

⁹⁰ Given the time lag between winning the bid to hosting an event and the staging of the event (in many instances a minimum of four years), it is probably the case that bids made after 2003 are reflected in the data for events staged from 2007.

Figure 3-52: Number of major sporting events supported by UK Sport and overall investment in supporting these events, 2000-2012

Source: Reproduced from UK Sport data

Note: No data available for 2002

A comparison of the amount of funding, the funding per event, and the number of events funded per year, pre- and post- the baseline date of 2003 indicates a significant increase post-2003 (Figure 3-53) indicating that the Games have acted as a catalyst for increased events.

Figure 3-53: Pre- and post-baseline levels of investment in the World Class Events Programme

	Average amount awarded annually	No. of events supported per year	Average funding (£000) per event
2000-3 Pre-Baseline Mean	£1,245,534	9.3	£140,225
2004-12 Post-baseline Mean	£2,926,153	15.3	£195,067

Source: Reproduced from UK Sport Data. Figures for 2005 and later are for awards 'up to the value' of specified amounts

Note: No data available for 2002 and thus excluded from averages

The benefits of hosting major events was experienced across a wide range of sports, with 41 out of 46 of Britain's summer Olympic and Paralympic sports staging at least one major World or European level competition in the UK in the six years preceding the 2012 Games.

(ii) Enhanced reputation

The following evidence does indicate that the Games have enhanced the UK's reputation as a major events destination which will make it easier to win the right to host future events:

- NGBs consulted⁹¹ indicated that the Games had showcased London and the UK's ability to host international events which would help attract events in the future.
- The permanent venues are also seen as a major draw, with international events secured to 2017, including the European Hockey Championships at the Lee Valley Hockey Centre in 2015, and IAAF World Athletics Championships and World Paralympic Athletics Championships in 2017.
- Venues in Northern Ireland hosted 100 countries, 1,396 delegates and 10,432 spectators at a range of events and PGTCs in 2012.⁹²

⁹¹ Grant Thornton (2013) *National Governing Body Research Report* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex B*)

⁹² Sport Northern Ireland

(iii) On-going support

While the UK's reputation has been enhanced by the Games and evidence indicates that more events have been supported, on-going support is vital to ensure that events are bid for and won.

UK Sport has shown on-going support for international events post-2012, with the Gold Event Series, UK Sport's major events programme for the period 2013-2019. It has been developed to help NGBs attract and stage some of the most important international sporting events to the UK, following the successful hosting of the 2012 Olympic and Paralympic Games.

Through the Gold Event Series, UK Sport will invest over £27m of National Lottery funding (a mean of £3.86 million, comparable with the mean for 2007-12 of £3.68 million) to help support the bidding and staging of major international sporting events up to 2019 with a comprehensive range of new and expanded support services to be provided to ensure that major events hosted in the UK are delivered to a world-leading standard.

Box 3-3 below summarises the Gold Event Series.

Box 3-3: Key statistics for Gold Event Series

- **70** major events to be targeted as part of the Gold Event Series;
- **£27 million** National Lottery funding invested in bidding for and hosting these events;
- **2.5 million** estimated live spectators who will watch these events;
- **25,000 officials and volunteers** who will gain event experience through the Gold Event Series and
- **£287 million** additional spend in cities and regions when they are hosting these events.

Source: UK Sport

The Gold Events Series has in part been brought about as a result of the 2012 Games, with successful hosting of the event showcasing the UK's ability to host large-scale events. However the success of the Gold Events Series will only be known in the coming years.

(iv) Conclusion

As a result of the Games, the UK has attracted more major sporting events. In addition, with the UK's reputation abroad significantly enhanced as a result of the Games with UK Sport's Gold Series, the UK should win and host more major events in the future.

4 Exploiting Opportunities for Economic Growth

4.1 Introduction

The economy legacy theme is about using the Games to support economic recovery and help generate long-term economic growth. As set out in the Government's Legacy document *Beyond 2012*⁹³, there are a number of ways in which the Games have and will continue to help to support the development of the UK economy and contribute to the overall value for money of staging the Games.

This chapter sets out the initial evaluation of activity related to the economic legacy theme. Evidence is presented according to the following sub-themes of activity:

- Overall economic impact of 2012 Games: a bespoke impact model using an input/ output framework was used to estimate the economic impact arising from the preparation and staging of the Games, as well as potential on-going legacy impacts via the activities described below;
- Business access to 2012: interventions aimed at promoting Games-related opportunities for UK businesses;
- Promoting the UK as a place to invest: using the Games as a hook to promote London and the UK as places to invest;
- Export and trade promotion: the extent to which the Games have given UK businesses the opportunity to showcase and promote UK innovation, enterprise and creativity, with opportunities to access new export markets and international contracts;
- Tourism: the impact of the Games and related events on visitor numbers and securing longer-term promotional impacts through using the event to showcase London and the UK as a potential tourism destination;
- Employability and skills development: using the Games to help people into sustainable employment or higher-skilled jobs (particularly those people who are unemployed or long-term unemployed) and to address skill gaps and shortages;
- Promoting sustainable business: creating opportunities for learning and sharing good practice in sustainability development; and
- Opportunities for disabled people in business and access to transport for disabled people.

⁹³ Department for Culture, Media & Sport (2012) *Beyond 2012 – the London 2012 Legacy Story*

Economic modelling

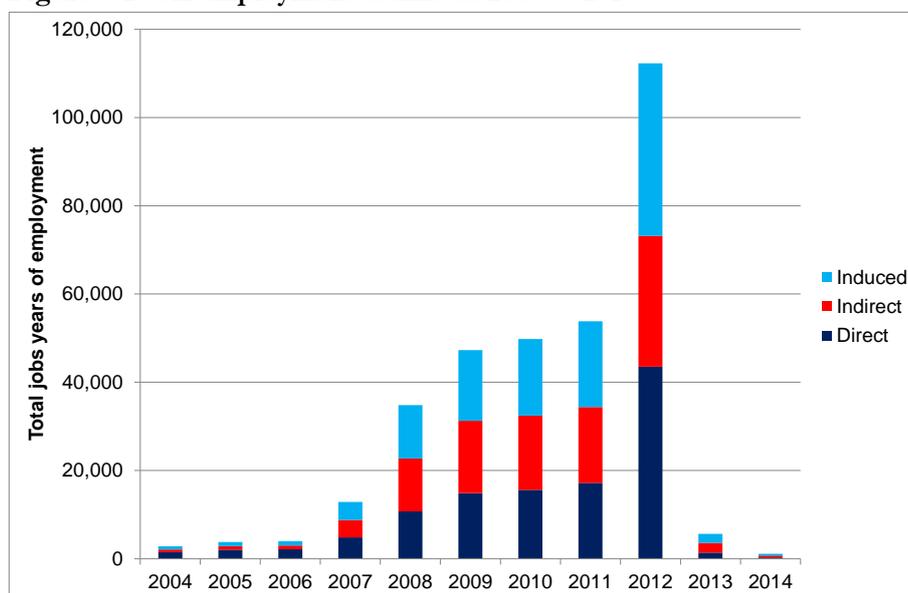
4.2 What has been the economic impact of contracts relating to the preparation and staging of the 2012 Games, in terms of employment and GVA?

Looking specifically at the economic impact of contracts relating to the preparation and staging of the 2012 Games (with consideration given to the wider economic impacts of the Games in chapter 8) it is apparent the Games, and particularly the construction of the Olympic Park, have provided a significant counter to the effects of the economic downturn.

(i) Gross impacts

Based on a bespoke impact model using input/ output frameworks designed by Oxford Economics, it is estimated that Games-related expenditure on the preparation and staging of the Games, including the £8.9 billion Public Sector Funding Package and £2 billion of privately funded London Organising Committee of the Olympic and Paralympic Games (LOCOG) spend, could have resulted in gross impacts of nearly £14.2 billion of GVA (£2009 prices) and approximately 328,000 job years of employment in the UK over the period. Figure 4-1 shows the breakdown of direct, indirect and induced job years of employment.

Figure 4-1: UK employment estimates 2004 to 2014

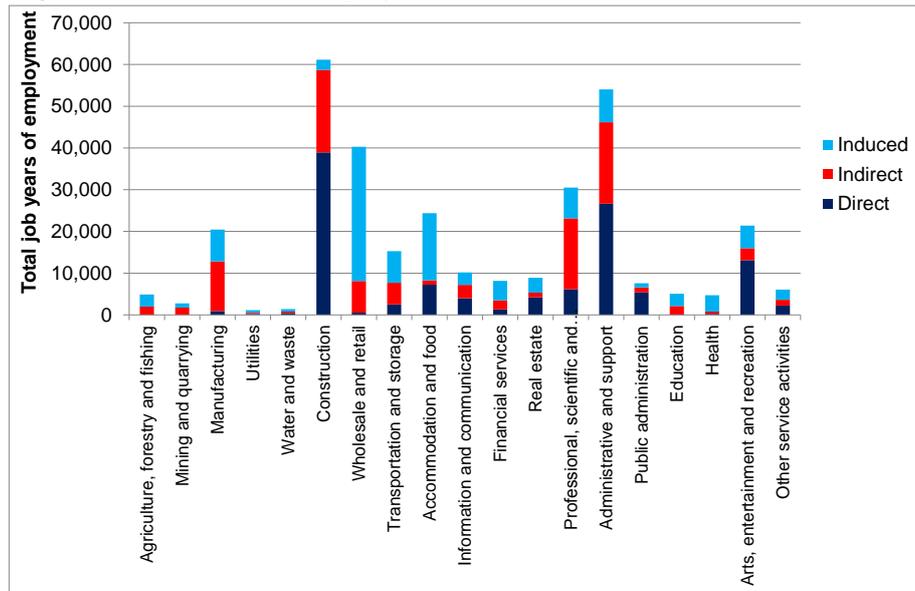


Source: Oxford Economics (2013) *London 2012 Olympic and Paralympic Games – Economic Modelling* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex A*)

Note: Direct effects include the employment (and in the analysis below GVA and wages) of 'Tier 1' contractors. Indirect effects take account of the supply chain or spending by 'Tier 1' contractors, estimated using average patterns of expenditure by region and sector. Indirect effects cover all sectors of the economy and create jobs, wages and GVA. Induced effects build in the impact of the additional consumer spending generated by the wages of those directly and indirectly employed.

In terms of how these gross impacts breakdown by sector, construction enjoys the greatest benefits given the profile of spending over the period (Figure 4-2). Administration and support services also enjoy notable direct employment benefits. Following on from this, the manufacturing sector enjoys considerable supply chain benefits. Induced benefits arising from consumer spending of those directly and indirectly employed are concentrated in sectors such as retail, and accommodation and food.

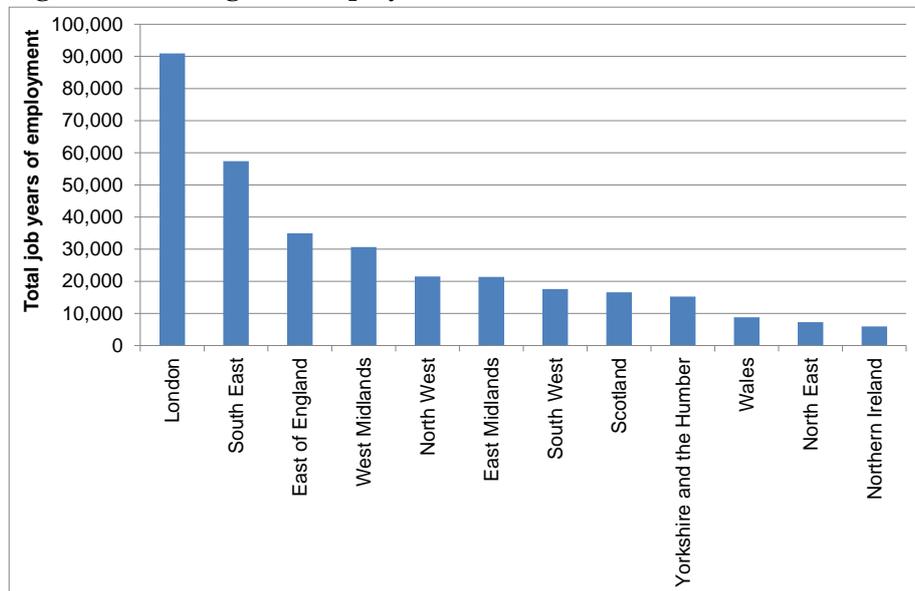
Figure 4-2: UK sectoral employment estimates 2004 to 2014



Source: Oxford Economics (2013) London 2012 Olympic and Paralympic Games – Economic Modelling (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex A)

At a regional level, London enjoys the largest labour market benefits, with nearly 91,000 gross job years of employment. Neighbouring regions of the South East and East of England also enjoy significant benefits. Northern Ireland (perhaps given its geographical location and relative size) has the least estimated gross jobs impact but still has over 5,900 job years of employment (Figure 4-3).

Figure 4-3: UK regional employment estimates 2004 to 2014



Source: Oxford Economics (2013) London 2012 Olympic and Paralympic Games – Economic Modelling (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex A)

Figure 4-4 provides a summary of the gross estimates of impacts by region. The figures include direct, indirect and induced impacts.

Figure 4-4: Summary of regional gross impacts⁹⁴

	Total output (£m, 2009 prices)	Total GVA (£m, 2009 prices)	Total job years of employment	Total earnings (£m, 2009 prices)
London	£10,400	£5,600	91,000	£2,500
South East	£4,800	£2,300	57,000	£1,300
East of England	£3,000	£1,400	35,000	£700
West Midlands	£2,300	£1,100	31,000	£600
East Midlands	£1,700	£800	21,000	£400
North West	£1,500	£700	21,000	£400
Scotland	£1,200	£600	17,000	£300
South West	£1,200	£600	18,000	£300
Yorkshire and the Humber	£1,100	£500	15,000	£300
North East	£500	£300	7,000	£100
Wales	£500	£200	9,000	£200
Northern Ireland	£400	£200	6,000	£100
Total	£28,700	£14,200	328,000	£7,100

Source: Oxford Economics (2013) *London 2012 Olympic and Paralympic Games – Economic Modelling (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex A)*

Note: figures have been rounded to the nearest hundred million for output, GVA and wages, and rounded to the nearest hundred for job years of employment

(ii) Net impacts

Analysis of unemployment and the output gap would suggest that the UK economy has had plenty of spare capacity since 2008. Consequently it is prudent to assume displacement rates have been relatively stable since 2008. However, pre-2008 the model does take account of the fact that the economy had notably less spare capacity and therefore the displacement rate assumptions are higher. In all of the displacement assumptions used regional and sectoral differences are also accounted for.

Having accounted for potential displacement of activity, the scale of the benefits arising from Olympic-related spending does fall slightly. The estimated total direct, indirect and induced GVA impact fall by 12.1% to £12.5 billion. This translates through to just under 291,000 job years of employment (11.3% below the gross estimates).

At a regional level, the relative impacts are roughly the same. London benefits from the largest boost to economic activity while Northern Ireland receives the least. The scale of displacement differs across regions. This arises due to the displacement assumptions and the types of contracts/ spending that occurred in each region and year. London is estimated to experience the largest displacement at around 15.1% while the West Midlands is expected to experience the least at approximately 7.9% (Figure 4-5).

⁹⁴ Output figures refer to the value of work done or the cost of providing goods and services. It differs from GVA in that it includes the costs of raw materials. GVA will therefore be lower than output. Job years is a measure of employment. Throughout the analysis employment impacts are given in terms of 'job years' in line with standard economic convention. Each 'job year' may be a permanent post, a temporary contract, or the full-time equivalent of several part-time roles. Also, it is not cumulative: so '100 job years for a 10-year period' means 100 full-time equivalent jobs sustained for 10 years, as opposed to 100 new permanent posts created each year. Total earnings refers to the associated wages of those employed.

Figure 4-5: Summary of regional net impacts⁹⁵

	Total output (£m, 2009 prices)	Total GVA (£m, 2009 prices)	Total job years of employment	Total earnings (£m, 2009 prices)
London	£8,800	£4,700	77,000	£2,100
South East	£4,300	£2,100	51,000	£1,100
East of England	£2,800	£1,300	32,000	£700
West Midlands	£2,100	£1,000	28,000	£500
East Midlands	£1,500	£700	19,000	£400
North West	£1,400	£700	19,000	£400
Scotland	£1,100	£600	15,000	£300
South West	£1,100	£500	16,000	£300
Yorkshire and the Humber	£1,000	£500	14,000	£300
North East	£500	£200	6,000	£100
Wales	£500	£200	8,000	£100
Northern Ireland	£300	£200	5,000	£100
Total	£25,300	£12,500	291,000	£6,300

Source: Oxford Economics (2013) *London 2012 Olympic and Paralympic Games – Economic Modelling* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex A*)

Note: Figures have been rounded to the nearest hundred million for output, GVA and wages, and rounded to the nearest hundred for job years of employment.

Business access to 2012

4.3 To what extent and in what ways have support interventions enabled UK businesses (across a range of sectors and including small and medium-sized enterprises and minority-owned businesses) to compete for and secure London 2012 supply contracts?

Support interventions were successful in increasing engagement from businesses across the UK in the opportunities offered by the Games. They also had some success in influencing the regional distribution of contract awards. However, there is little evidence to suggest support interventions were able to generate substantial additional economic benefits for the UK economy as a whole as contracts awarded for the Games through the CompeteFor service will have largely displaced business away from other UK companies.

Preparing for and staging the Games was a major opportunity to deliver longer-term benefits for UK businesses. Government intervention was based on the need to ensure fair and open access to London 2012 Games contract opportunities and to give UK businesses from all regions and nations of the UK the best possible opportunity to benefit from these opportunities. It was perceived that UK businesses, particularly small and medium-sized enterprises (SMEs) and minority-owned businesses, would face barriers in accessing information on and bidding for Games contracts in the absence of new initiatives.

The main mechanism for spreading and sustaining the business benefits across the UK was the CompeteFor Electronic Brokerage Service (CompeteFor) developed by the English Regional Development Agencies (RDAs) and Devolved Administrations. The service was set up to ensure transparency and availability of London 2012 business opportunities and to maximise the number and diversity of businesses contributing to the delivery of the Games. Since the service began in 2008, other major buying organisations and their supply chains are using

⁹⁵ Output figures refer to the value of work done or the cost of providing goods and services. It differs from GVA in that it includes the costs of raw materials. GVA will therefore be lower than output. Job years is a measure of employment. Throughout the analysis employment impacts are given in terms of 'job years' in line with standard economic convention. Each 'job year' may be a permanent post, a temporary contract, or the full-time equivalent of several part-time roles. Also, it is not cumulative: so '100 job years for a 10-year period' means 100 full-time equivalent jobs sustained for 10 years, as opposed to 100 new permanent posts created each year. Total earnings refers to the associated wages of those employed.

CompeteFor as part of their procurement process, including TfL and Crossrail (currently the largest civil engineering construction project in Europe) – meaning that business opportunities are being made available to potential suppliers beyond the Games.

Between 2008 and 2012, the RDAs also funded ‘2012 Business Lead’ posts, who co-ordinated promotional activity for businesses relating to the Games and supported the promotion of CompeteFor through the Business Link service. Additional funding from BIS and the RDAs also supported the delivery of a range of business focused workshops to continue to promote CompeteFor and to support businesses in gaining access to 2012 Games-related business opportunities.

The Final Evaluation of CompeteFor⁹⁶, incorporated evidence from surveys of over 2,000 businesses which registered on the system and were awarded contracts. The Nations and Regions End of Games reports also provided additional operational data on the outputs of the regional support mechanisms, as well as illustrative case study evidence.

(i) Overcoming barriers to bidding

There is a consensus amongst key stakeholders that the CompeteFor service and associated business support mechanisms were successful in terms of engaging UK businesses in Games-related business opportunities. As reported in the CompeteFor evaluation, as of March 2013, a total of 166,388 businesses had registered with the service. CompeteFor monitoring data indicates that 9% of the registered businesses were BAME owned/ led, in line with the proportion in the total population of UK businesses.

Stakeholder consultations indicated the vast majority of contracts awarded through CompeteFor were related to the Games. The Final Evaluation of CompeteFor concluded the service achieved some limited success at making bidding simpler and stimulating more firms to bid for contracts - 25% of registered firms reported through the evaluation survey that it had made bidding easier while 22% claimed that they had bid for more contracts as a result of CompeteFor. The evaluation also showed that CompeteFor has been relatively successful in increasing awareness about public sector business opportunities among organisations (for example, 38% of registered businesses would not have been aware of opportunities relevant to them without CompeteFor). This is particularly the case among SMEs.

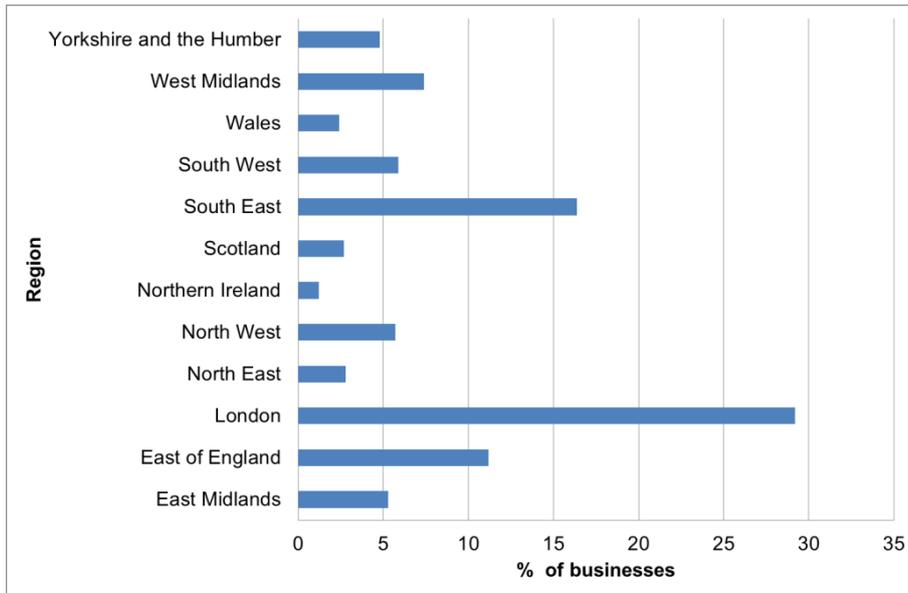
(ii) Impact on the geographical distribution of Games contracts

Interrogation of the CompeteFor monitoring data and additional evidence from the London 2012 Nations and Regions Group (NRG) indicates that the CompeteFor service and related regional support mechanisms are likely to have had some success in influencing the geographical distribution of contract awards.

As shown in Figure 4-6 below, the London region had highest proportion of registered businesses (nearly 30% of all businesses registered on CompeteFor). The second most represented region was the South East of England (16% of all businesses registered). According to the CompeteFor evaluation, the concentration of registrations in London is consistent with findings from stakeholder interviews which suggest that while a significant effort was made in the early days of CompeteFor by the regional supplier engagement teams to encourage SMEs based outside of London to register and use the service, the closure of the RDAs and regional Business Link offices, which promoted CompeteFor in the regions, made it much more difficult to maintain the regional diversity of users. Overall, CompeteFor monitoring data indicates that the service achieved some involvement from businesses in all English regions and in Scotland, Northern Ireland and Wales, although there was some scope to achieve a better penetration into the northern regions of England and the other nations of the UK.

Figure 4-6: Location of registered businesses (March 2013)

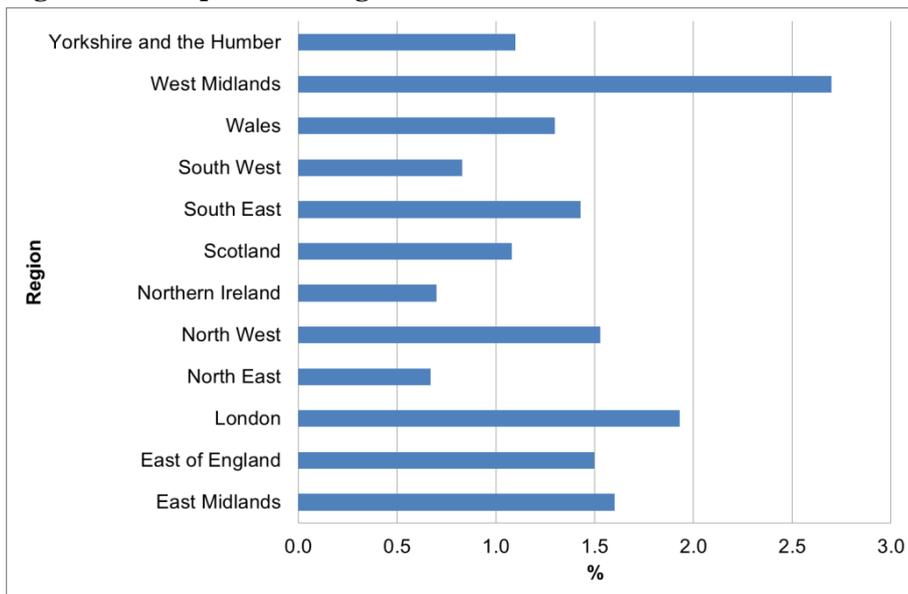
⁹⁶ Evaluation Partnership (2013) *National Impact Evaluation of CompeteFor*. Final Report to Transport for London and Department for Business, Innovation and Skills



Source: CompeteFor Contract Management Team (Transport for London)

Figure 4-7 below shows that there was a good geographical spread of contract awards amongst businesses that are registered on CompeteFor. The highest proportion has been in the West Midlands where 2.7% of the registered businesses secured a contract. London was the next most successful, with around 1.9% of registered businesses awarded contracts.

Figure 4-7: Proportion of registered businesses awarded contracts



Source: CompeteFor Contract Management Team (Transport for London)

Additional evidence gathered for the NRG indicates that the success of businesses in securing Games-related contracts in regions outside of London was aided significantly by the early recognition of the need to put in place support structures and resources to help firms benefit, as illustrated by the example in Box 4-1 below.

Box 4-1: Business Support for London 2012 – Opportunities in the West Midlands Region

In the West Midlands region, a regional ‘Task Force for 2012’ was formed early on in 2006. E-business groups bought into an ambitious 2012 business objective for the region. Over 70 seminars, workshops, and other London 2012 Games business briefings were held in the region to publicise the opportunities from the Games and support businesses in the bidding process. It appears that this helped the West Midlands region to achieve a high success rate in terms of the number of contracts won relative to the size of the registered business population (West Midlands had the highest conversion rate at just over 2.5% compared to the next highest of just under 2.0% which was London).

(iii) Demand-side impact on the UK economy

A measure of the extent to which CompeteFor enabled UK businesses to compete for and secure London 2012 Games supply contracts is its overall impact on the UK economy through enabling UK businesses to access contracts that would have otherwise been awarded to overseas competitions (demand-side effects). The evaluation concludes that CompeteFor did not generate additional economic benefits at the level of the UK economy, as contracts awarded through the service were displaced from other UK companies which would have been awarded the contracts in its absence. As the evaluation notes, however, the central objective of CompeteFor was not to generate income for businesses per se, but to distribute more evenly the income generated through the staging of the Games.

Nevertheless, it is worth noting that two firms responding to the survey of 350 businesses conducted for the Interim Evaluation did report turnover benefits which were not secured at the expense of other UK-based firms. Due to the small numbers of firms identified by the survey responses, involved it was decided that these reported effects should not be extrapolated for the purposes of the final evaluation.

(iv) Supply-side impact on the UK economy and wider benefits of CompeteFor

Evidence from the evaluation indicates that there are number of ways in which businesses may have benefitted from the service beyond the direct benefits associated with being awarded a contract (supply-side effects). For example, CompeteFor has played a role in influencing businesses to bid for more public sector contracts. Half of the businesses surveyed claimed that they are more likely to bid on public sector contracts as a result of CompeteFor. Approximately one in four companies have sought partnerships with other businesses (in the UK and abroad) and a similar proportion reported that CompeteFor had influenced them to introduce a new product, service or process to their business. The Final Evaluation concluded that CompeteFor generated a net creation of approximately 5,000 jobs in beneficiary firms, which equates to an average 1.12 jobs created per firm that reported an impact from CompeteFor.

While a substantial proportion of the benefits to contract winners will have constituted displacement, the final evaluation concludes that 6% of these impacts, including supply-side innovation and productivity effects, are potentially additional to the UK economy. On this basis, it suggests a potential impact of CompeteFor on the UK's GVA of some £72 million between 2012 and 2017.

4.4 How has the delivery of 2012 Games-related contracts impacted on the long-term productivity and competitiveness of UK companies?

Games-related contracts have helped to enhance the capacity and expertise of UK businesses, although it is too early to examine the full extent of the impact. A series of surveys which examined the impact of the Games on UK businesses provided largely qualitative indications of the direct effects of Games contracts and pointers towards some of the other longer term benefits that may emerge.

A series of Government legacy statements^{97,98} highlighted the potential for UK businesses to use the experience of delivering Games contracts to create a legacy of increased capacity and expertise. It was anticipated that the Games would benefit a range of economic sectors, not only through the direct effects of Games contracts, but also through other commercial opportunities that the Games would generate. Five key sectors were highlighted as holding particular opportunities for capitalising on the staging of the Games: construction, retail, tourism, sports activities and creative and high-tech industries.^{99,100}

Business survey results on the effects of Games contracts pointed to the reputational benefits that can be built on in the longer-term and some early successes in terms of securing further work. Stakeholders consulted for the meta-evaluation perceived that the potential longer-term effects of the Games on UK businesses will most likely result from the experience of delivering Games contracts. However, these stakeholders also identified a number of other potential longer-term benefits, such as lessons in partnership approaches and business practices which were established to address security concerns and transport issues at Games-time.

The key evidence of these impacts is considered below under the separate headings of direct effects and other long-term benefits.

(i) Direct effects of Games Contracts

Research for DCMS¹⁰¹ based on a survey of 276 construction companies found that the benefits of Games contracts have influenced the longer-term competitiveness of the firms involved:

- 63% reported their work on London 2012 encouraged innovation in their business;
- 68% said working on the 2012 Games had enhanced their reputation, rising to 77% for larger companies; and
- Almost a third had already secured further work as a result of their experience with the 2012 Games.

The DCMS survey of construction companies, the only research that addresses the impacts of Games contracts on skills development, reported that two-fifths of companies involved in Games contracts took the opportunity to train employees specifically for the project. Health and safety training was the priority. More than half of the construction companies and those providing services for this sector said they had carried out special training in the area of health and safety.

More general evidence on the impacts of Games contracts on capacity and expertise is provided by a Federation of Small Businesses (FSB) post-Games survey of 200 businesses across London and the surrounding area. Over one in ten (12%) of respondents said they had worked on an official Olympic or Paralympic Games contract.¹⁰² One half of these companies felt that the reputation of their business had been boosted by this experience and a fifth (20%) had already obtained further work as a result. Almost a third (32%) have seen the market position of their business improve and 28% have seen a higher level of skills within their business.

A common issue identified by stakeholders was the marketing restriction which was in place to ensure businesses working on the Games did not promote themselves in a way that undermined the rights of the official London 2012 and Olympic sponsors. DCMS research¹⁰³ identified the restrictions on companies marketing their own involvement in the Games as a potential barrier to maximising the benefits of the Games to UK businesses. The research found that this was particularly true for smaller contractors who did not enjoy the same degree

⁹⁷ Department for Culture, Media & Sport (2010) *Plans for the Legacy from the 2012 Olympic and Paralympic Games*

⁹⁸ Department for Culture, Media & Sport (2012) *Beyond 2012 – the London 2012 Legacy Story*

⁹⁹ Department for Culture, Media & Sport (2010) *Plans for the Legacy from the 2012 Olympic and Paralympic Games*

¹⁰⁰ Department for Culture, Media & Sport (2012) *Beyond 2012 – the London 2012 Legacy Story*

¹⁰¹ Sir John Armit for the Department for Culture, Media & Sport (2012) *London 2012 – a global showcase for UK plc*

¹⁰² Federation of Small Businesses London Region (2012) *Passing the Baton: How small businesses have been affected by the London 2012 Games*

¹⁰³ Sir John Armit for the Department for Culture, Media & Sport (2012) *London 2012 – a global showcase for UK plc*

of success or recognition as larger businesses, and did not share the same optimism and confidence about the future. The British Olympic Association (BOA) has since negotiated a limited licence arrangement with the IOC which allows for a particular form of words to be used in advertising the role companies played in delivering the Games. As of May 2013, 644 companies had been approved for a license to use the scheme.¹⁰⁴ However, there is limited evidence on the extent to which the IOC's marketing clause has constrained UK businesses in building on their Games role and stakeholder views are mixed on whether the advertising clause has hindered businesses. As some stakeholders pointed out, many of the businesses involved rely on informal networks and can use their networks to promote their experience on the Games. On the other hand, some business umbrella organisations are clear that the advertising clause has acted as a hindrance for small business.

A particular way in which the delivery of Games contracts may provide longer-term benefits for UK businesses is through increasing their opportunities to access new export markets. Evidence on impacts from exporting is explored in detail in section 4.7.

(ii) Other longer-term benefits

Business surveys and interviews with stakeholders have identified further ways in which the Games could lead to longer lasting benefits for UK businesses. These include particular co-ordination mechanisms established to address potential security risks and changes in attitudes to flexible working to cope with possible transport issues during the Games.

The Cross Sector Safety and Security Communications network (CSSC) was established in London in 2011 by the London Police Service, The Home Office and business groups. The purpose of the CSSC was to be "*a communications structure that was implemented in the run up to the London 2012 games, and continues afterwards as a lasting enhancement to safety and security in the capital*". While there was already a network to share information and intelligence on security issues, the Games encouraged CSSC to expand this to all businesses through key sector contacts which improved the flow of information. Stakeholders representing business umbrella organisations have indicated that the communication channels were effective and were able to provide real time information to feed down to their members.

In the run-up to the Games, Transport for London (TfL), supported by business organisations, delivered a comprehensive awareness campaign of the potential transport impact on businesses and commuters that additional users might bring. Employees were advised to use alternative modes of transport or travel outside peak times and only when necessary and businesses in the London area were asked to relax their staff working pattern arrangements (e.g. by allowing staff to take annual leave, work from home or other locations, or work alternative hours) and to put in place contingency plans for deliveries.

The experiment of flexible working during Games-time could have lasting benefits for UK businesses if it were to lead to more productive working practices. London Chamber of Commerce and Industry (LCCI), in collaboration with pollsters ComRes, surveyed 165 London businesses and interviewed 13 businesses from a variety of sectors and company sizes.¹⁰⁵ The results showed that some 42% of businesses surveyed allowed their employees to work from home during the Games period and 29% from other locations, while 46% allowed their staff to work flexible hours. Of this, nearly a third (27%) said they would keep homeworking options available to their staff (having put this measure in place for the Games); 17% would maintain the flexibility of working from other locations, 28% would continue to offer flexible hours and 11% working compressed weeks. The LCCI findings are backed up by a BT survey of 600 UK businesses which showed that 34% of businesses are continuing to enjoy the benefits of flexible working facilities brought in for the Games.¹⁰⁶

¹⁰⁴ Source: British Olympic Association

¹⁰⁵ London Chamber of Commerce and Industry (October 2012) *2012: The final hurdle: securing a business legacy*

¹⁰⁶ BT (2013) *London 2012 Legacy Survey*

Promoting the UK as a place to invest

4.5 To what extent have the Games encouraged foreign-owned businesses to invest in the UK (and create associated GVA and employment) through influencing their perceptions of the UK as a place to invest, either through specific programmes or through the exposure the Games have provided?

Inward investment projects with an estimated value of £2.5 billion have already been attracted to the UK as a result of the Games and Games-related promotional activity with 31,062 jobs being created and 4,534 further jobs secured. Drawing on a range of evidence sources it can also be concluded that there is considerable potential for the Games to impact on inward investment in the longer-term. Case studies of inward investment projects completed for the meta-evaluation provide illustrative evidence on how the Games and the events around them have helped to influence inward investment projects. The case studies also show how the Games contributed to enhanced perceptions of the UK as place to invest and helped to instil confidence in the companies regarding the future prospects for their UK operations. Stakeholders have highlighted that an assessment of the full extent of impacts of the Games on inward investment can only be made over the next five years.

There was an expectation in the Government's legacy strategy that the additional exposure of London and the UK would help influence business perceptions of the benefits of locating in the UK.¹⁰⁷ The Games also provided a valuable opportunity to promote the benefits of London and the UK as attractive investment locations. Furthermore, the 2012 Games also brought new connections for London and the UK, not only with other host cities but also through the presence of business leaders in London during the Games.

A number of key UK Trade and Investment (UKTI) initiatives and other interventions were designed to use the Games as a 'hook' to generate inward investment. The £2.5 billion of inward investment projects already secured contributes to the overall target of £6 billion over the four years following the Games as a result of London 2012 and the associated inward investment programmes such as the British Business Embassy.¹⁰⁸ London & Partners, the inward investment agency for London, also led a number of initiatives which used the Games to promote London as an investment location.

(i) Influence of the Games on promotional activity

Based on the consultation evidence, it is reasonable to assume that more businesses were exposed to marketing information and attended more promotional events in London in 2012 than would have been the case without the Games. Consultation evidence indicated that a programme of events of the scale and intensity of the British Business Embassy and Global Investment Conference which were held during the Games period would not have gone ahead without the Games. In total, over 4,700 delegates attended the British Business Embassy and the Global Investment Conference¹⁰⁹ attracted around 200 global CEOs (two thirds of the international delegates) from 29 countries. Stakeholders also believed that the Games encouraged UKTI and London & Partners to focus more effort on building links with the host countries of other major sporting events.

Stakeholders generally believed that the 'catalytic effects' of the Games in terms of the added exposure of London and the UK and enabling infrastructure improvements are likely to be more significant in terms of generating new investments. The Tech City Investment Organisation is supporting the technology and creative sectors cluster in East London, stretching from Shoreditch to the Olympic Park. Stakeholders believed this could significantly increase the inward investment potential for the area and help London compete in the future.

¹⁰⁷ Department for Culture, Media & Sport (2010) *Plans for the Legacy from the 2012 Olympic and Paralympic Games*

¹⁰⁸ A trade and investment event held at Lancaster House during the Games which showcased British business, design and technology to international business delegates.

¹⁰⁹ The flagship event for the British Business Embassy which aimed to showcase UK businesses and the UK as a global investment destination. The conference took place in London on the day before the Olympic Opening Ceremony.

(ii) Evidence on programme outcomes

As highlighted above, UKTI's target for the inward investment component of its Games programme was to deliver £6 billion economic benefit to the UK economy by July 2016. The total benefit achieved to date (as of March 2013) is estimated as £2.5 billion with 31,062 jobs being created and 4,534 further jobs secured. This figure was derived from UKTI's assessment of whether the inward investment decision was influenced by the Games and/or Games-related events and the overall figures are validated independently.

The regional breakdown of inward investment supported by UKTI in terms of value and jobs is presented in the table below. The data shows that the regions receiving the largest share of investment projects have been London and the South West.

Figure 48: Regional breakdown of Games-related inward investment (March 2013)

Region	Value of Investment (£m)	Number of additional jobs
East Midlands	4	51
London	1006	14,928
North East	19	7
North West	30	315
Scotland	115	850
South East	81	553
South West	716	12,550
Wales	22	498
West Midlands	410	1160
Yorkshire	59	150
TOTAL	2,500	31,062

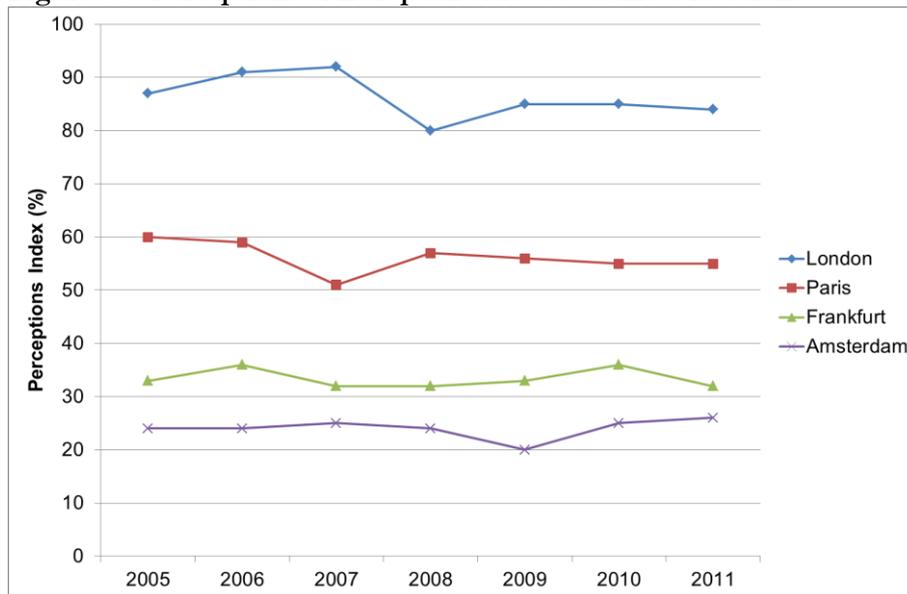
Source: UK Trade and Investment

London & Partners has provided an analysis of investment projects in which the Games could be considered to have had a 'catalytic' impact on the decision to locate in London or that the Games were/ are a factor that encouraged further growth of an existing foreign-owned start-up. In order to be counted as an investment completion, a project has to comply with at least three criteria from a list which reflects the agency's Games-related activity. According to monitoring data provided to the meta-evaluation, London & Partners work leveraging the Games as a catalyst to attract additional FDI into London (2006 to present) has to date contributed to the creation of over 7,000 gross jobs.

Case studies undertaken for the meta-evaluation also provide illustrative evidence on how the Games and the events around them have helped national and regional inward investment agencies to develop their relationships with companies. The companies provided positive feedback on the contribution of UKTI and London & Partners Games-related activities in supporting their investment projects.

(iii) Perceptions of London

Perceptions of London as an investment location appear to have improved in the run-up to the Games, consolidating London's standing as the leading investment location in Europe. Cushman & Wakefield's annual survey on Europe's major business cities provides an overview of the perceptions that corporations have about cities across Europe and their relative attractiveness, and how perceptions have changed over time (Figure 4-9). The data shows London has consistently achieved the highest score as a location to do business. Since 2008 the difference between London and the scores for three comparable cities (Paris, Amsterdam and Frankfurt) has widened slightly – London's score increased from 80 to 84 while the score for Paris reduced from 57 to 55. It is clear that efforts to promote London in the build up to the Games intensified so it is plausible that some of this increase can be attributed to the Games.

Figure 4-9: Perceptions of European cities as business locations

Source: Cushman and Wakefield European Cities Monitor 2005-2011

Note: The scores for each city are based on the responses of a survey of 501 European corporations with scores weighted according to nominations for the best, second best and third best.

The Cushman and Wakefield survey also shows that the percentage of business leaders believing that London is doing the most to promote itself increased significantly from 16% in 2010 to 25% in 2011. Given the increasing levels of promotional activity in the run up to the Games, it is reasonable to believe that some of this change can be attributed to the Games.

The inward investment case studies undertaken for the meta-evaluation also show how the Games contributed to enhanced perceptions of the UK as place to invest and helped to enhance the instil confidence of the companies regarding the future prospects for their UK operations.

Box 4-2: Case Study – Impact of the Games on an Investment Decisions

Huawei is a global telecommunications company that supplies 45 out of the world's 50 top telecommunications companies and the majority of the UK telecoms market. Huawei's global headquarters are located in Shenzhen in Southern China. Huawei has investments in every Western European country and has been operating in the UK for around 11 years. The company currently employs 890 staff in the UK. Staffing is projected to increase to around 1,500 in the next 4-5 years, nearly doubling their UK workforce. Senior members of the Huawei Board in China attended the Global Investment Conference held in the UK in July 2012, organised by UKTI. Huawei's Chairperson made a keynote address on China Day during UKTI's British Business Embassy (BBE). Some very senior Board members also attended Games events and participated in fringe meetings with the Prime Minister and the Mayor of London. Following the Games, on the 11th September 2012, Huawei's president and founder Mr Ren Zhengfei had a meeting with the Prime Minister in London. At that meeting Mr Ren promised and pledged a £1.3 billion investment in the UK. This was a brand new announcement and was the first time an investment of that volume has been made here in the UK by Huawei. Overall Huawei rated the information, support and advice received from various Government agencies through Games-related events and activities as being "very helpful" in influencing their decision to extend their UK operations.

4.6 To what extent have 2012 Games-related contracts helped to generate foreign direct investment (and associated GVA and employment) by encouraging foreign-owned companies to move their operations to and maintain their presence in the UK?

The CompeteFor service, with which foreign companies can register, provided an additional opportunity for UKTI and other agencies to target potential overseas investors, and convert foreign interest in Games contracts into wider investment potential. UKTI monitoring data indicate that 520 international companies that bid through CompeteFor for 2012 Games contracts (as of May 2012) had been advised by UKTI on inward investment opportunities in the UK since they registered with the service.

Export and trade promotion

4.7 To what extent has hosting the 2012 Games enabled UK businesses to move into new export markets (including through export promotion in host and other nations, in support of development goals, and through the development of 'soft networks'), and what were the GVA and employment benefits?

Games-related export promotion activities have to date generated £5.9 billion in additional sales for UK companies, and High Value Opportunity (HVO) contracts have been won totalling a further £1.5 billion. There is further evaluation evidence to suggest that Foreign and Commonwealth Office (FCO) diplomacy campaigns used the Games effectively to enhance the reputation of UK businesses abroad, which should contribute to increasing exports in the future, and case studies provide illustrative evidence on how UKTI has used the Games and the events around it to help UK businesses access new export markets.

The rationale for the export and trade promotion focus in the legacy of the 2012 Games is the expectation that the international spotlight on the UK as a result of the Games will open up new export markets to UK companies. The Government's legacy strategy anticipated that the build up to the Games, and particularly the Games period itself, would give UK businesses the opportunity to showcase and promote UK innovation, enterprise and creativity, with opportunities to access new export markets and international contracts.¹¹⁰ In the post-Games period, there is also potential for businesses to build on their successes in delivering Games contracts by exploiting innovation and their enhanced reputations in international markets.

The following key initiatives aimed to use the Games as a hook to encourage UK businesses to access greater exporting opportunities:

- UKTI's High Value Opportunities (HVO) programme is a new approach to identifying, prioritising and supporting businesses to access large scale overseas procurement opportunities. The Games-related element of the HVO programme builds on the UK's success in delivering technologies, goods and services in the preparation and staging of the Games;
- The British Business Embassy (BBE), which involved a series of global business summits during the Games, was delivered by UKTI to promote UK exports, as well as promoting the UK as a place to invest;
- The FCO Public Diplomacy campaigns aimed to use the Games to enhance the reputation of UK industry abroad, as well as to promote British security, culture and values; and
- The British Business Club, launched in September 2011, provided a one-stop-shop where up-to-date details of networking events, future business opportunities and potential partners were posted in the lead up to, and during, the Games with the aim of boosting the opportunities for UK companies to make valuable international business connections.

¹¹⁰ Department for Culture, Media & Sport (December 2010) Plans for the Legacy from the 2012 Olympic and Paralympic Games Written Ministerial Statement

UKTI's target is to deliver £5 billion of benefit to the UK economy from additional sales from Games-related activities and contracts won from HVOs over the four years following the Games.

(i) Programme outcomes

UKTI's Performance and Impact Monitoring Survey (PIMS) results released at the end of June 2013 provide data on the outcomes and impacts of the BBE and related activity delivered in the 12 months to December 2012. The data indicates that:

- 58% of clients reported significant business benefit as a result of the support provided by UKTI during the BBE and other related activity; and
- Games-related activity delivered £5.9 billion of additional sales for UK companies.¹¹¹ No estimates are available of the GVA benefits.

In addition, UKTI indicate that the Games-related element of the HVO programme has generated £1.5 billion in contracts won in the period up to March 2013.

UKTI's target was to deliver £5 billion of economic benefit¹¹² to the UK economy by July 2016 from additional sales and HVO contracts won. The total benefit achieved to date from these two components is estimated as £7.4 billion.

(ii) Impact of Games-related contracts

Stakeholders were generally of the view that the Government responded effectively in recognising the potential for UK businesses to capitalise on their experience of working on Games contracts. Stakeholders commended the Government for setting out a clear strategy for exporting as early as possible and establishing a dedicated Games team at UKTI. Stakeholders also saw as a positive development the greater level of collaborative working across Government departments and agencies in terms of using the Games as a means of promoting UK businesses abroad. It was felt that this should encourage greater cross-departmental working in the future on exporting strategy. Finally, some stakeholders highlighted the longer-lasting impacts of the Games in encouraging UKTI to develop a new approach to helping UK businesses to bid for international contracts particularly in the areas of sports and events. It was recognised that it may be many years before the full extent of the exporting potential of the Games will be realised.

Generally, there is limited evidence available on the role of Games contracts in helping UK businesses to access export markets. Case studies provided by UKTI provide illustrative evidence of the potential impacts on UK businesses' exporting as a result of working on Games contracts, as well as impacts which are the result of support provided by UKTI (see box below). As noted in section 4.4, in December 2012, the Federation of Small Businesses (FSB) surveyed 200 businesses across London and in the surrounding areas to obtain a better understanding of the likely legacy for micro and small businesses. Over one in ten (12%) of the businesses that responded to the survey said that they had worked on an official Olympic or Paralympic Games contract. However 95% of these businesses said that the contracts provided little access to export markets. This finding is consistent with views from some stakeholders who believed more support needs to be provided to small and micro businesses in building on their involvement in the Games and exploiting their connection with the Games in export markets.

¹¹¹ Derived from number of individual firms supported multiplied by mean additional sales. This calculation excludes individual firms supported through the English region events which are less than ½ day events. Note as well that additional sales are not necessarily overseas sales and some increase in domestic sales may be included.

¹¹² UKTI define economic benefits as additional sales and not additional GVA.

Box 4-3: Case Study – Impact of Game Contracts and UKTI Support on Exporting (AND Architects)

For the London Olympic and Paralympic Games, AND Architects was commissioned to work on a range of temporary structures on both client and contractor side, including the BP Showcase Pavilion and BP Walk in the Park, the Coca-Cola Pavilion, the BMW Pavilion, the EDF Pavilion and the basketball training facility. Over the years, AND Architects has worked with UKTI to expand its overseas client base, with a particular focus on Brazil. In 2008, the practice joined a trade mission to Rio and São Paulo, where it was given access to potential projects for the 2014 FIFA World Cup™. The trade mission gave AND Architects a place at the UKTI stand at Soccerex, the annual networking event for businesses involved in the football industry. This opened up a world of new contacts and allowed the company to get to know the local market.

“Without UKTI’s support we simply wouldn’t have gone to Brazil or exhibited at Soccerex... the cost of attending was subsidised to the extent that it was actually cheaper for us to exhibit on the UKTI stand than to buy a ticket and attend as a delegate. What’s more, standing there under the UKTI banner maximised our exposure and made sure that we attracted attention, making our investment much more worthwhile. Even though Soccerex is specifically geared around football, it gave us an amazing opportunity to look at work going on in Brazil and understand local opportunities and changes in the procurement process for major contracts.”

AND Architects has returned to Brazil with UKTI several times since then, building relationships with existing contacts and connecting with new potential partners and clients. In 2010, the company met a local partner and the two went on to partner on a resort project in Maranhão, in Northern Brazil. This resort comprises a base camp for use in the 2014 World Cup, a hotel, golf course, 70 villas and 300 apartments. AND Architects has since completed a feasibility study and outline design for the development.

A second partnership that arose out of the company attending Soccerex with UKTI has resulted in a contract to design the handball arena for the 2016 Rio Olympic and Paralympic Games. AND Architects experience with temporary structures for the 2012 Games in London helped a local firm to secure the prestigious contract.

(iii) Reputation of UK businesses

There is evaluation evidence to suggest that the Games helped to enhance the reputation of UK businesses abroad. An evaluation was carried out by the Foreign & Commonwealth Office (FCO) Public Diplomacy Group on its Public Diplomacy Campaigns in the build up to the Games. A key source of evidence was a final post-Games evaluation survey in which 159 ‘posts’, diplomats who work in high level positions in UK embassies, took part. The evaluation reports that posts worked with UKTI partners to target the right audiences and networks; promoted the expertise of British companies through screenings of the FCO documentaries (Going for Green and Game Changer); and sponsored media visits to the Olympic Park and companies involved in the build, as well as projecting the sustainability agenda through participation in local climate change and sustainability conferences and seminars. The evaluation concluded that messages about UK capability in delivering major infrastructure projects reached an audience of 120 million through sponsored media visits and a further 597 million through screenings of ‘Going for Green’. Journalists who attended the media visits almost unanimously agreed that as a result they now had a more positive opinion about the UK, seeing it as modern and innovative and providing leadership in sustainability, urban regeneration and green technology. However, the evaluation concluded it was too early to confirm if the campaign achieved its objective of bolstering the UK economy through increased commercial opportunities for British business in target countries.

Tourism

Sections 4.8 through to 4.11 summarise evidence relating to the impact of the Games on tourism in the UK. These impacts range from the more direct impacts on visitor numbers coming to the UK to attend the Olympics, Paralympics or other related events (the focus of sections 4.10 and 4.11) and the longer term, as well as the more indirect impacts relating to improved perceptions of the UK as a place to visit and the tourism impact of Games-related marketing campaigns. Most of the evidence points to the immediate short-term impacts of the Games and associated marketing campaigns but evidence that assessed the potential longer term impacts on the tourism sector due to the 'legacy' of the Games is also reviewed. It is important to note that the estimated impacts presented from these various sources are not mutually exclusive and should not be 'added together' unless stated otherwise.

4.8 To what extent have 2012 Games-related marketing campaigns inspired more people from overseas to visit the UK (thereby increasing visitor spend and creating new jobs)?

Games-inspired tourism marketing campaigns have generated some significant benefits for the UK's visitor economy. Evaluations of three of the major Games-related international and domestic campaigns indicated the campaigns may have generated additional visitor expenditure in the region of £800m in the periods covered by the evaluations.

The 2012 Games provided an opportunity to secure longer-term promotional impacts through using the event and the media coverage around it to showcase London and the UK as a potential tourism destination. In particular, a number of tourism marketing campaigns were inspired or influenced by the Games. These include:

- **You're Invited:** Visit Britain are investing approximately £100 million of public and private sector funding in an international marketing programme: the 'You're Invited' campaign. The campaign aims to use major events taking place in Britain, including the 2012 Games, to deliver 4.7 million extra visitors from overseas and £2.27 billion in extra visitor spend over the period 2011-2015.
- **GREAT:** The GREAT campaign launched in February 2012. It is designed to run alongside and complement the You're Invited campaign. The campaign, which is receiving £34.5m over 2011/12 to 2013/14, has been rolled out across 14 major cities in nine key inbound tourism markets and is aimed to reach an estimated audience of some 90 million people.
- **'Holidays at Home are Great':** This is a £8 million programme and campaign led by DCMS and Visit England aimed at increasing domestic tourism. The programme objectives are to support the movement towards domestic holidays by using the 2012 Games to *'reinforce this trend and strengthen the future of tourism, thereby supporting the economy and employment'*.¹¹³ The campaign commenced in March 2012.
- **Limited Edition London** – The overall objective of this London & Partners campaign was to encourage visitors from 'core' markets to come to London during the period September 2011 to July 2012. It aimed to direct traffic to visitlondon.com whilst raising the profile of London & Partners, the new organisation in charge of promoting the capital. The campaign also aimed to ensure visitors knew London was open for business and home to a series of one-off events.
- **Regional Tourism Campaigns** – A number of the nations and regions co-ordinated campaigns to maximise the opportunities the Games offered for their visitor economies.

Both You're Invited and GREAT are designed to capitalise on exposure given to London and the UK as a result of the Games. A number of research studies completed before the Games predicted that the majority of tourism benefits would be realised in the post-Games period through the raised profile of the UK. Other research examined the experience of previous

¹¹³ Department for Culture, Media & Sport Press Release (12 September 2011)

mega-events and based on this concluded that some potential 'regular' tourists would postpone or cancel visits to London or the rest of the UK, while the Games participants and spectators who replaced some of them would typically spend less per visit. Campaigns such as Holidays at Home are GREAT and Limited Edition London were put in place to help mitigate such displacement effects.

In terms of the influence of the Games on different campaigns, stakeholders reported that without the Games, similar promotional activity to You're Invited would have gone ahead, although it is likely that it would have taken place on a much smaller scale. Importantly, the Games encouraged VisitBritain to change its approach to co-operating with the private sector on campaign activity. Stakeholders believe the private sector, which is contributing up to £50 million to the You're Invited campaign, would have also had less incentive to invest on this scale without the Games.

Stakeholders also reported that it was very unlikely that funding would have been available for both the GREAT marketing programme and the Holidays at Home are GREAT campaign without the Games. The impacts of both campaigns can therefore be considered wholly attributable to the Games.

Drawing on robust evaluations of the three major national campaigns, it can be concluded that Games-inspired marketing has generated some significant benefits for the UK's visitor economy. Evaluations indicate that the campaigns may have generated additional visitor expenditure in the region of £800m in the periods covered by the evaluations. It is important to note that this does take into account the impact of the VisitBritain You're Invited campaign in the post 2011/12 period when impacts can be expected through the enhanced PR activity of VisitBritain. Moreover, this figure only includes interim findings for the GREAT image campaign with again more significant impacts expected in the future. The remainder of this section looks in more detail at the outcomes and impacts of a number of specific campaigns.

(i) International campaigns

The *Evaluation of VisitBritain's work in the Financial Year 2011/12* published in October 2012 reported on the outcomes and impacts of the first year of the four-year £100 million You're Invited programme (up to the end of 2011/12). VisitBritain has reported that to a large extent all of the agency's activity is part of the four-year programme. The impact figures presented below therefore reflect the impact of all VisitBritain activities in 2011/12, of which the You're Invited campaign was a major component. As noted above, stakeholders reported that without the Games, similar promotional activity to You're Invited would have gone ahead; however, it is likely that it would have taken place on a much smaller scale.

The evaluation of the campaign was based on a survey of 11,865 people and provided a robust assessment of VisitBritain's impacts. Based on evidence from this survey, the overall impact of VisitBritain's marketing activity on 'incremental' or additional spend in 2011/12 was estimated at £307 million. In particular, the figures highlighted the increasing importance of BRIC (Brazil Russia India China) markets, which accounted for 15% of incremental spend (£46 million).

VisitBritain's overall PR activities also generated more than 28,000 individual pieces of TV, radio, print and online coverage, almost 5,000 more than in 2010/11.¹¹⁴ The evaluation reports that the advertising value equivalent (AVE)¹¹⁵ of this coverage was £3.7 billion, more than twice the £1.5 billion generated in 2010/11. In addition, the evaluation also reported that the Agency exceeded its target for Opportunities to See (OTS, meaning the number of times someone is likely to see a marketing message), generating more than 41 billion OTS during the year.

The evaluation of the VisitBritain GREAT Campaign was conducted through four waves of survey research. Across all waves and all cities a total of 11,700 responses were achieved. The evaluation showed that recall of the advertising continued to build with each wave of research

¹¹⁴ Visit Britain (2012) *Evaluation of VisitBritain's Work in the Financial Year 2011/12*

¹¹⁵ A common measure used by tourism agencies which indicates the monetary value of all press and PR coverage generated by campaigns based on what equivalent advertising space would have cost.

on both measures, with GB moving up the rankings from last place behind 4 other competitor destinations that were compared with (in the pre wave) to second (behind only the US) for both spontaneous and prompted recall in the most recent wave of the research (March 2013).

The evaluation reports on the 'funnel' of consideration from long term intention to visit to short term intention to visit and then booking, all of which continued to improve over three stages of post-wave research. At the time of the third wave research 23% of respondents who recalled the advertising said that they were highly likely to visit in the next year (9 or 10 out of a scale of 1-10) compared to 11% of respondents who could not recall the advertising. Critically, those who recall the campaign are more than twice as likely as those who did not recall to say they strongly intend to visit Britain in the next three to five years, or indeed to have booked already.

The evaluation modelled potential impacts by taking the estimated number of leisure visits from each city in 2011 as a baseline, then tracking the increase in intention to visit in the next year amongst recent international travellers who recalled the campaign. The uplift in intention to visit in the next year was applied to the 2011 baseline to provide the potential extra number of visits generated. Each extra visit was multiplied by the average leisure spend per visit (appropriate to the city). The measurement of uplift in intention was based on an index change which was derived from a comparison between the pre wave and post wave responses. As there were several waves of research the results have been scaled, not simply added.

The evaluation estimates that if the index change in stated strong intention to visit in the next year between the pre wave respondents and the post wave respondents in each wave who recalled the campaign (127%, 141%, 125% index change in post waves 1, 2 and 3 respectively) is translated into extra visits then this could potentially generate extra spend of £200.25 million from the cities targeted by the GREAT campaign or 422,000 additional visits. This potential return from visits to Britain from the GREAT cities will be accrued over almost two years up to March 2014. Setting this against an investment of £25 million indicates a Return on Investment of 8:1 over the 2 year period.

The evaluation notes that the strongest uplifts overall were in Berlin, Los Angeles, Sydney and Toronto. However in the post Games period (post waves 2-3), New York and Paris also saw very strong returns. Reactions in emerging markets (Delhi, Mumbai, Shanghai, Beijing, Rio and Sao Paulo) were also very positive.

The campaign also has wider, longer term aims not reflected in the shorter term return, especially in the emerging markets. Perceptions of Britain's strengths (heritage and culture) have improved in general and likelihood to visit in the longer term has grown for those who recalled the advertising (an index change of 120% in those likely to visit in the next three years comparing the pre-wave to post-wave responses). Encouragingly people were as likely to say the advertising made them want to visit Britain outside London as well as London itself.

The evaluation concluded that the timing of campaign and its association with the Games appears to have boosted the campaign's impacts. Less than half the amount spent in the pre-Games phase (Feb 2012-July 2012) of the campaign was spent in the post-Games phase (Sept 2012-March 2013) but as the evaluation reported, levels of recall continued to grow, as did intention to visit, and positive perceptions have seen a step change. The evaluation noted that these were maintained over a relatively long period (over a year), when a dip may have been expected.

Interviews with key stakeholders also highlighted that the GREAT campaign and related promotional efforts have had longer-lasting impacts on government approaches to international marketing. Stakeholders reported that the GREAT campaign has encouraged VisitBritain to work more collaboratively with other Government departments and agencies, including the FCO, UKTI and British Council, not only on the campaign itself, but also on wider tactical approaches to international tourism development.

(ii) Domestic campaigns

VisitEngland completed a rigorous evaluation of the impact of the Holidays at Home are GREAT campaign (the GREAT domestic campaign), adopting a robust methodology to arrive at economic impact figures for the campaign, including a survey of 581 businesses who provided offers to the great2012offers.com website and surveys of people who had accessed GREAT branded services. Between March and October 2012, VisitEngland's Brand, Communications and Satisfaction¹¹⁶ tracker interviewed some 3,000 respondents who had taken a holiday in England during the campaign period to examine the influence of GREAT advertising.

In the eight month period from early March to the end of October 2012, it is estimated that the "Holidays at Home are GREAT" campaign and other related VisitEngland activity generated incremental spend of almost £300m:

- £1.6m in direct redemptions for businesses providing offers to the site;
- £20.7m incremental spend by visitors to the great2012offers.com website;
- A significant proportion of the £43m in incremental spend generated by the main visitengland.com website over the period;
- An estimated circa £240m in further incremental spend among those who viewed the campaign, over and above the spend generated by the website; and
- Based on average spending of £66 per night on English holidays, this means that the campaign and other VisitEngland activity over the period generated some 4.5 million additional domestic holiday nights during 2012.

In summary, the evidence suggests that Games-inspired marketing campaigns have had a significant impact on tourism spending from both international and domestic visitors, and that these campaigns would not have been commissioned on such a large scale had the Games not been hosted by London in 2012. However, there is likely to be some overlap between the visitors inspired to visit the UK due to the marketing campaigns and those who decided to visit the UK directly due to the Games themselves (e.g. attended Olympic or Paralympic events). Therefore, the estimated impacts presented in this section should not be considered wholly additional to the impacts estimated in the tourism impact assessment which is presented in sections 4.10 and 4.11 below.

These findings mainly focus on the short term impacts (visitor spending in 2012 itself) of the marketing campaigns. As set out in the following sections, there may also be a potential long term impact of the Games on the visitor economy due to improved perceptions of the UK as a place to visit and the wider legacy effects of the Games.

4.9 To what extent and in what ways has the staging of the 2012 Games impacted on perceptions of the UK as a place to visit?

As highlighted in section 4.8, the 2012 Games provided an opportunity to secure longer-term promotional impacts through using the Games and the media coverage around it to showcase London and the UK as potential leisure tourism destinations. It was expected that London and the UK as a whole could benefit from increasing exposure and enhanced perceptions, positive perceptions which tourism agencies' marketing campaigns could then build on.

A diverse range of evidence is available on the impact of the Games on perceptions of London and the UK as places to visit. The most comprehensive piece of research on the impact of the Games on perceptions of the UK was undertaken by Visit Britain based on the Nations Brand Index (NBI), an online survey run by GfK in partnership with Simon Anholt. Generally the evidence indicates that the Games have had a positive impact on London and the UK's

¹¹⁶ The tracker uses continuous online interviewing among those in the market for holidays.

reputations abroad; however, it is too early to demonstrate whether these positive impacts are either transitory or enduring.

The remainder of this section considers specific impacts in terms of media coverage of the UK and London in 2012, how the Games and the media coverage has converted into changes in international perceptions of the UK and finally, how the experience of attending the event has influenced the perceptions of overseas visitors.

(i) International media coverage

A London 2012 Games media impact study commissioned by the meta evaluation team was conducted by experts at Lancaster University.¹¹⁷ The study used a content analysis methodology and linguistic investigation techniques to explore very large collections of news reportage in order to discover whether hosting the Games had any reputational implications for the UK. The study covered approximately 13 billion words of general English from 2008 and 2012, 93 million words of UK national newspaper reporting and 35 million words of global press reporting. Amongst other issues, the study explored the impact the Games had on business and tourism for the UK, London and East London specifically. The conclusions drawn by the authors can be accepted with a high degree of confidence based on a very large base of evidence with results tested at a high degree of statistical significance well beyond the 99.9% confidence level. The key findings of the research with respect to potential impacts on perceptions of the UK as a place to visit are as follows:

- London has experienced both a sustained and positive association with the Games over the period from 2005, with the association intensifying in 2012. However, in terms of coverage of the UK in the global press there has been little change, indicating it is the host city rather than the host country which experiences this positive association;
- Looking at word association with UK, England and London in the global media, the UK is still associated with traditional references, such as its university system, over the Olympics. However, for London there has been a clear impact as it becomes associated with the Games, legacy and regeneration. Two examples from Australia and Japan highlight the change in sentiment globally of London and the East-end from a run-down area to one that has been transformed for the better;
- There is a markedly increased prominence of reporting on East London in general, and Stratford in particular, with regard to urban regeneration; and,
- In the Chinese language press, the Games seemed to have switched the discussion of the UK away from a wholly negative discussion focussing upon a faltering economy and difficult military engagements overseas to a more positive discussion of positive economic activity, the Games and tourism.

The study findings are consistent with those from a more limited review by VisitBritain of the immediate impact of the 2012 Games on perceptions of Britain overseas. The review was based on the feedback of VisitBritain's staff who were monitoring the media and national sentiment in overseas markets. The major themes to emerge from the analysis were as follows:

- There was a warm response to the friendliness, humour and welcome of the British people, highlighted by the volunteers, soldiers and British crowds cheering athletes from all countries;
- Praise for Britain and London's diversity and vibrancy – the 2012 Games portrayed as a cultural melting pot; and
- Venues with tourist attractions as backdrops helped show Britain at its best.

Stakeholders also indicated that the Visit England and London & Partners' media programmes played a positive role in ensuring that media representatives were given the best possible impression of London and the UK during the Games.

¹¹⁷ Tony McEnergy, Amanda Potts and Richard Xiao (2013) *London 2012 Games Media Impact Study*

(ii) Impacts on perceptions

Initial research on the impact of the Games on perceptions of the UK as a place to visit generally indicated that international media coverage of London and the UK in the period leading up to the Games and during the Games has converted into positive impacts on perceptions. The most comprehensive piece of research on perceptions was undertaken by Visit Britain, based on the Nations Brand Index (NBI). The NBI is a measure of the international image of countries, or the 'power of the brand', based on a number of criteria across six dimensions: exports, governance, culture and heritage, people, tourism and investment/ immigration.

The research indicated that the 2012 Games had a positive effect on the UK's nation brand in 2012.¹¹⁸ The survey findings found that between the annual NBI survey, which was conducted just before the Games began, and a special post-Games, Britain moved up one place to be ranked fourth out of 50 major countries around the world. Given that nation brands are very stable and no dramatic changes were expected, this small change can be regarded as being linked to the Games. Britain was ranked higher for culture (especially for sport) than it had been pre-Games, but there were also improvements for welcome and natural scenic beauty, indicating that Games coverage had influenced perceptions of Britain and the British people more widely.

The key findings in terms of Britain's image were:

- Overall nation brand has moved up one place to 4th ;
- For Culture, the UK has also moved up one place to 4th ;
- For Tourism, the UK has held at 4th, and held at 7th for aspiration to visit; and
- For Welcome, the UK moved up 3 places to 9th.

The NBI research shows that those who confirmed they had seen coverage of Britain hosting the Games were more positive about Britain when awarding scores on all attributes relating to tourism, culture or welcome, as shown in the table below (Figure 4-10).

Figure 4-10: Post-Games scores on perceptions of Britain

Mean score out of 7 (1 = strongly disagree 7 = strongly agree)	Post Games – saw coverage	Post Games – did not see coverage
Tourism		
Would like to visit if money was no object	5.7	4.9
Is rich in natural beauty	5.1	4.7
Is rich in historic buildings and monuments	5.5	4.9
Has a vibrant city life and urban attractions	5.4	4.8
Culture		
Excels at sport	5.1	4.4
Has a rich cultural heritage	5.4	4.8
Is an interesting and exciting place for contemporary culture	5.2	4.6
People		
If I visited, the people would make me feel welcome	4.9	4.5

Source: Visit Britain Nation Brand research

¹¹⁸ Visit Britain (January 2013) *Foresight Issue 111*

Visit Britain's NBI research also showed that 63% of those who saw coverage of Britain hosting the Games agreed it had increased their interest in visiting for a holiday (and this was notably higher in emerging markets, including the BRICs).

Other VisitBritain research found that visitors during Games-time felt very welcome in Britain:

- 99% of departing overseas visitors during July to September 2012 said they had felt welcome in Britain, with five out of six visitors 'very or 'extremely' welcome. This compares to 79% in Q3 2011; and
- 98% of departing overseas visitors during July-September 2012 said they would be likely to recommend a holiday in Britain to friends and family.

These findings are from questions VisitBritain sponsors on the Civil Aviation Authority (CAA) survey of departing passengers at five of the main UK airports (Heathrow, Gatwick, Luton, Stansted and Manchester). The findings are based on interviews with 2,088 departing overseas residents during July, August and September 2012.

There was also a clear consensus amongst the stakeholders interviewed for the meta-evaluation that the Games have helped to elevate the strategic importance of tourism. As one stakeholder commented that partly as a result of the Games "*tourism is now considered an important export industry across Government*". The Games have also driven a new growth strategy for inbound tourism to Britain from 2012 to 2020 which was published in April 2013.¹¹⁹ The key aim of the strategy is to deliver London 2012 Games' economic legacy through tourism, recognising the need to build on the positive perceptions that the Games have generated. The strategy's ambition is to attract 40 million overseas visitors (compared to 31 million in 2011) and to earn £31.5 billion from international tourism a year by 2020. A key aim of the strategy is to increase the UK's market share in particular growth economies such as Brazil, Russia, India and China. As section 4.9 indicates, there is evidence that the GREAT campaign, which has a strong association with the Games, is driving increases in intention to visit the UK and there are early indications that bookings have increased as a result of this.

(iii) Perceptions of visitors to the Games

A survey of visitors to Olympic and Paralympics Games ticketed events provided additional evidence on how the Games impacted on the perceptions of overseas visitors who attended the Games.¹²⁰ This was a small survey of public ticket holders attending events at the Olympics and the Paralympics, covering the Olympic Park, ExCeL London Exhibition and Conference Centre and Wimbledon venues. The results are based on a sample of 1,264 respondents (897 Olympics and 367 Paralympics).

The results indicate that generally around three-quarters of overseas visitors were left with a positive impression of London. Respondents were asked how their visit to the Games impacted on their opinion of London as a tourist destination. For each aspect, respondents were asked if their opinion was 'better than before', 'same as before' or 'worse than before'. The results for overseas respondents are presented in the table below (Figure 4-11).

¹¹⁹ Visit Britain (2013) *Delivering a Golden Legacy: A growth strategy for inbound tourism in Britain from 2012 to 2020*

¹²⁰ Ecorys (2012) *Visitor Survey Report* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex C*)

Figure 4-11: Impacts of Games Visit on Perceptions of London (Overseas Visitors)

	Better than before	Same as before	Worse than before	Don't know
Overall as a place to visit	77%	15%	0%	9%
Activities including attractions, museums and park	60%	24%	0%	17%
Quality of services and customer services	73%	20%	1%	6%
Accessibility and transport	78%	16%	1%	5%
Security	72%	20%	1%	7%
Environment	72%	22%	0%	6%

Source: Visitor Survey Report (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex C)

Note: n=168

The respondents were also asked if their experience of visiting the Games had made them more or less likely to want to visit London for a leisure trip in the future. Positively, 56% of overseas visitors said that the trip had made it 'much more likely' that they would want to visit London again in the future.

4.10 What was the total impact of the 2012 Games on visitor numbers and spend (both domestic and overseas) across the UK?

Sections 4.8 and 4.9 set out the evidence for the impact of the Games on tourism through providing an opportunity for investment in destination marketing campaigns and improving global perceptions of London and the UK. This section and 4.11 of the tourism section provide an analysis of the actual numbers of people visiting the UK to witness the Games, and is particularly focused on those who attended Olympic/ Paralympic-related events in quarter 3 of 2012. The evidence is primarily based on findings from a tourism impact assessment undertaken for the meta-evaluation, which estimated the net additional impact of the Games on the visitor economy, taking into account additionality factors such as deadweight, displacement and crowding out.

In total, about 830,000 overseas visitors attended an Olympic/ Paralympic Games event in 2012. Over nine million tickets were sold to UK residents while a further six million UK residents travelled to non-ticketed Games events, such as the Olympic torch relay or the Cultural Olympiad. After accounting for deadweight and crowding out, it is estimated that the total net additional benefit to the UK visitor economy in 2012 due to the Games was £890 million, or £598 million if spending on tickets is excluded. The longer term impact of the Games could be much higher due to an increased profile of the UK as a legacy of the Games. A number of research studies completed before the Games predicted that the majority of tourism benefits would come in the post-Games period, including Oxford Economics estimate of a net tourism gain to the UK of £1.24 billion over the period 2007 to 2017, with 79% of this impact accruing from 2013 onwards.

The 2012 Games provided an opportunity to stimulate overseas and domestic tourism, particularly over the longer term, by using the Games to showcase London and the UK. In December 2010 DCMS announced plans to deliver a lasting tourism legacy not just for London, but also for the whole country

Evidence of the impact of the 2012 Games on visitor numbers and spend was derived from the following sources:

- International Passenger Survey (IPS) data showing numbers of Games-related visits to the UK by overseas residents and associated expenditure;
- Meta-evaluation survey of Games-time visitors undertaken at three major London venues (Olympic Park, Excel Exhibition and Conference Centre and Wimbledon) during both the Olympic and Paralympic Games (sample of 1,264 respondents);

- Sample of 129 respondents¹²¹ from the Great Britain Tourism Survey (GBTS) who attended a Games event as part of an overnight stay;
- Sample of 147 visitors¹²² from the Great Britain Day Visits Survey (GBDVS)¹²³ who attended a Games event on a day visit;
- LOCOG data on the number of tickets sold for the Games and total revenue from tickets;
- Tourism Impact Assessment undertaken for the meta-evaluation to estimate net additional impact of the Games on the visitor economy in London and the rest of the UK. This used data from the above four sources to provide a robust assessment of the impact on tourism, taking into account factors such as deadweight and crowding out.
- Research by Oxford Economics estimating the potential long term net tourism gain to the UK economy.

(i) Impact from overseas visitors

International Passenger Survey (IPS) data shows that 830,000 overseas visitors coming to the UK between July and September 2012 attended one or more Olympic-related events, including ticketed events, free-to-view events and London 2012 Festival events. In total, these visitors spent over £1.03 billion in the UK during their stay.¹²⁴ Just over half of visitors attending an event reported that the main purpose of their visit was Games-related, although they accounted for nearly two-thirds of the expenditure of those attending an event. A further 40,000 visitors (£56 million of spending) did not attend an event but did say that the main purpose of their visit was Olympic/ Paralympic Games related.

The tourism impact assessment included further analysis on this IPS data to assess the extent to which these visits and expenditure could be attributed to the Games and whether the Games created a crowding out effect by deterring other non-Olympic visitors from coming to the UK.

A number of overseas visitors, particularly those whose primary purpose for visiting the UK was not Olympic/ Paralympic Games related, reported that they would have visited the UK anyway even if the Games had not taken place, although the Games did influence some visitors to come for longer than they would have done otherwise. It is estimated that £674 million of overseas visitor expenditure in Q3 2012 can be attributed to the Games, reduced to £604 million if ticket sales are excluded. It is estimated that about 70% of additional overseas visitors stayed in London, while a further 12% stayed in the South East.

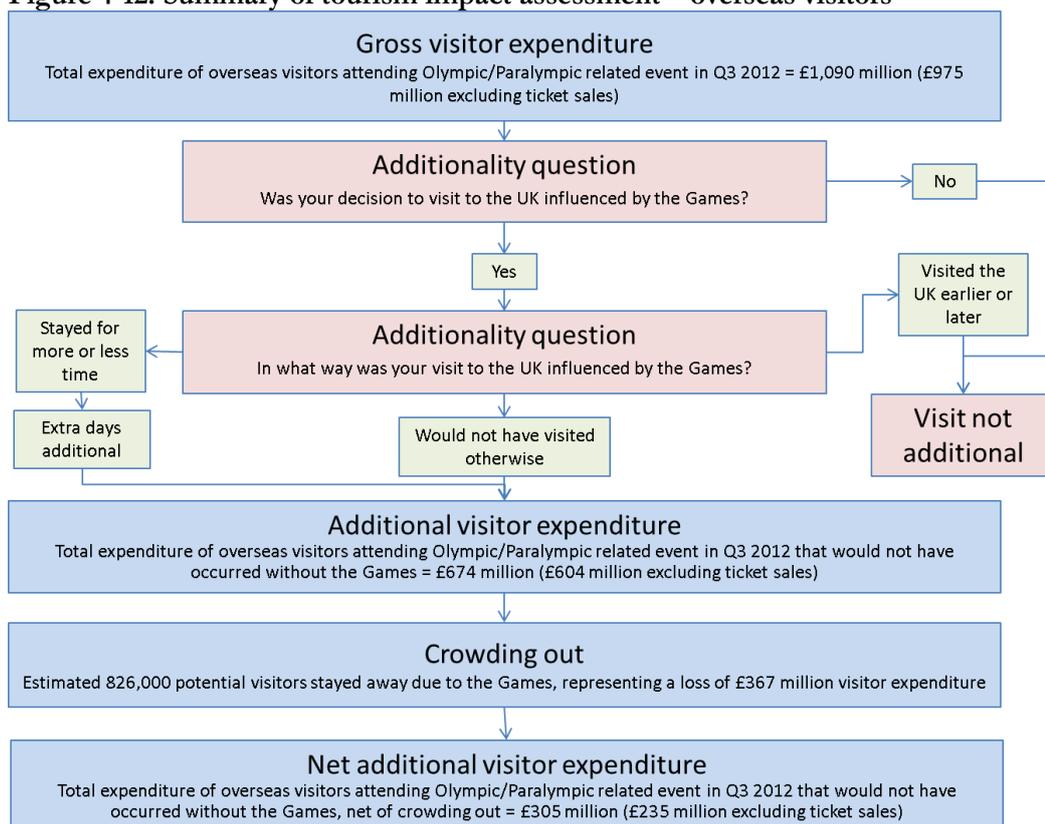
Despite the influx of Games visitors overall international visitor numbers to the UK were actually down in Q3 2012 when compared to the previous year. This suggests that there was substantial displacement of regular visitors who were deterred by the potential for overcrowding, disruption and price rises because of the Games. After accounting for these crowding out effects, it is estimated that, in net additional terms, the Games led to a decrease in overseas visitor numbers in 2012 of about 365,000. However, due to the fact that visitors coming for the Games spent more on average than other visitors, the net additional impact on visitor expenditure is positive – estimated to be £305 million, or £235 million excluding spending on tickets. The steps for this calculation are summarised in Figure 4-12 below.

¹²¹ In 2011, about 100,000 interviews were undertaken for the GBTS of which about 10-20% reported going on an overnight trip with the UK and Ireland over the previous four weeks.

¹²² Over 2012 as a whole, the GBDVS recorded a sample of 33,788 tourism day visits lasting three hours or more

¹²³ The GBDVS measures tourism day trips and 3+ hour trips. The *London 2012 Tourism Impact Assessment: Impact of London 2012 on Visitor Numbers and Expenditure* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base*) includes Games-related tourism day trips only and excludes all 3+ hour trips as 3+ hour trips are generally not counted as tourism trips.

¹²⁴ ONS, IPS visit estimates provided to aid meta evaluation of the London 2012 Olympics and Paralympics; for Department for Culture, Media & Sport, March 2013

Figure 4-12: Summary of tourism impact assessment – overseas visitors

Source: London 2012 Tourism Impact Assessment: Impact of London 2012 on Visitor Numbers and Expenditure (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex B)

(ii) Impact from domestic visitors

Estimates from LOCOG suggest that 80-85% of the 11 million tickets sold for Olympic and Paralympic events were purchased by UK residents, which means the impact of domestic tourism due to the Games was also potentially significant. The meta-evaluation visitor survey finds that, for ticketed events, about a fifth of domestic visitors attended events as part of an overnight stay spending on average £125 on their visit per ticket purchased, while domestic day visitors also spent a significant amount in the visitor economy (£86 on average per ticket purchased). Extrapolating this expenditure for all Olympic and Paralympic Games tickets sold to UK residents suggests that domestic day visitors attending ticketed events spent about £621 million in the visitor economy, while domestic overnight visitors attending ticketed events spent about £234 million in the visitor economy.

Estimates from the GBTS and GBDVS suggest that a further 6.4 million UK residents travelled to a non-ticketed London 2012 event, including the Olympic torch relay and the Cultural Olympiad, between January and October 2012. These data sources were used to estimate that a further £149 million was spent by domestic overnight visitors attending non-ticketed events and further £353 million was spent by domestic day visitors attending non-ticketed events.

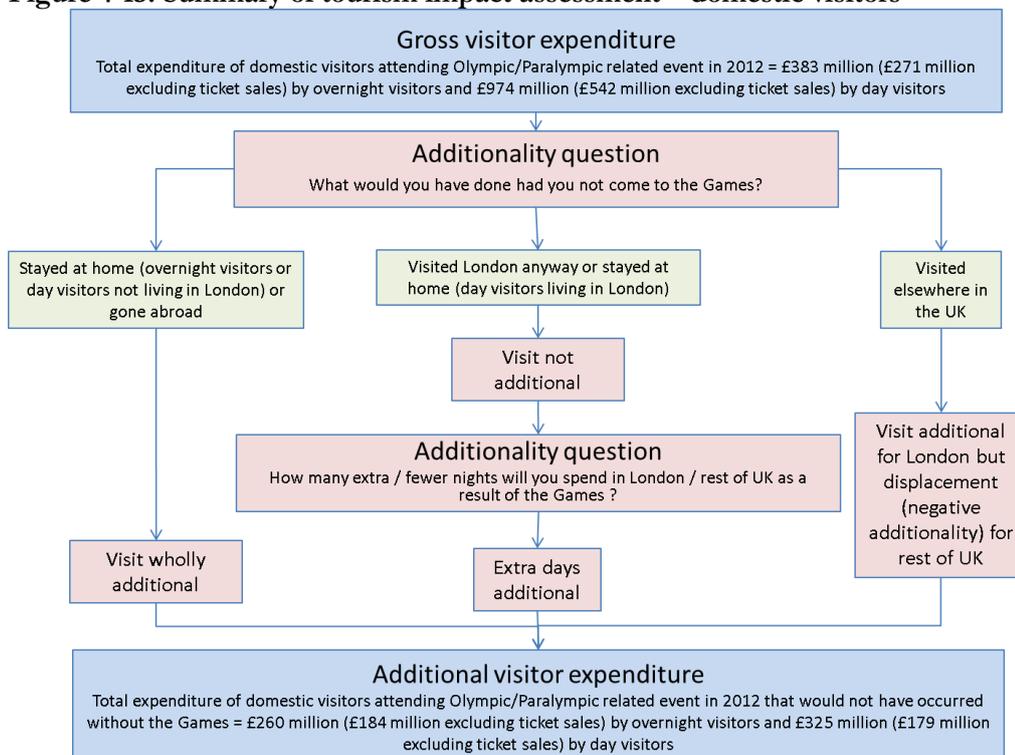
The meta-evaluation visitor survey asked respondents to state what they would have done if they had not come to the Olympic/ Paralympic Games. While some would have visited London or elsewhere in the UK anyway, others would have otherwise stayed at home or gone overseas. These responses were used to estimate the additional impact of the Games on domestic visits, as well as levels of displacement of visitor expenditure between London and the rest of the UK.

The results from this analysis suggest that additional expenditure in the UK visitor economy due to the Games was £260 million from overnight visitors (£184 million when ticket sales are excluded) and £325 million from day visitors (£179 million when ticket sales are excluded). Expenditure by day visitors was heavily concentrated in London (although, even accounting for

displacement, the net impact on the rest of the UK was also positive) while expenditure by overnight visitors was more evenly split between London and the rest of the UK combined. The steps for this calculation are summarised in Figure 4-14 below.

However, these domestic estimates do not account for the likelihood of diversion of expenditure from other domestically produced goods and services or for changes in expenditure patterns by those who did not attend events; for example, the Games may have influenced many UK residents to stay at home and watch television rather than spend money in the visitor economy.

Figure 4-13: Summary of tourism impact assessment – domestic visitors



Source: London 2012 Tourism Impact Assessment: Impact of London 2012 on Visitor Numbers and Expenditure (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex B)

(iii) Longer term impacts on tourism

The evidence presented in sections 4.8 and 4.9 suggests that the tourism impact of the Games extends beyond just those people who actually attended an event, due to improved marketing and perceptions of the UK as a place to visit. This may lead to longer term benefits to the UK tourism sector in future years due to the Games raising the profile of the UK as a tourist destination. A number of research studies completed before the Games predicted that the majority of tourism benefits would come in the post-Games period through the raised profile of the UK. Research by Oxford Economics¹²⁵ estimated that the net tourism gain to the UK economy of the Games could be £1.24 billion (at 2011 prices) for the period 2007-2017. The research estimated that net benefits for the UK are likely to be split 8%, 13% and 79% in terms of the 'Pre-games', 'Circa-Games' and 'Legacy' phases. A strong benefit was clearly expected for the years 2013-17 in the immediate 'legacy' period as London and the UK as a whole benefit from increased visitor numbers due to their increased exposure in international markets, and especially emerging markets.

IPS data shows that visitor numbers in 2012 Q4 were over 5% higher than 2011 Q4. A small proportion of these visitors (about 24,000) said that the Games had definitely or probably influenced their decision to visit the UK, of which 19,000 said that they visited later than they would have done otherwise. This is likely to largely reflect people delaying their visit to the UK

¹²⁵ Oxford Economics (2011) *The Value of the Olympic and Paralympic Games to UK tourism – updated estimates*

to avoid the Games, thus mitigating some of the crowding out effect observed in the tourism impact assessment.

4.11 What has been the impact of 2012 Games-related cultural events on visitor numbers and spend (both domestic and overseas)?

It is estimated that 126,000 overseas visitors, 340,000 domestic staying visitors and 2.99 million domestic day visitors attended a Cultural Olympiad event in 2012, although the additionality of these visits appears to be lower than for Games sporting events. The tourism impact assessment estimates that the Cultural Olympiad may have accounted for £63 million in additional overseas visitor spend.

Evidence on visits to Cultural Olympiad events is available from the IPS (overseas visitors), GB Tourism Survey (overnight domestic visitors) and the GB Day Visits Survey (domestic day visitors). Drawing on this data, an assessment of tourism impacts has also been completed as part of the Evaluation of the Cultural Olympiad. Additional analysis has been undertaken as part of the meta-evaluation tourism impact assessment (section 4.10).

(i) Impact from overseas visitors

Analysis of the IPS¹²⁶ gives an indication of the impact of the Cultural Olympiad on visitor numbers and expenditure of overseas residents. The analysis estimates that 126,000¹²⁷ overseas visitors to the UK in Q3 2012 attended a London 2012 Festival show or exhibition, spending in total an estimated £170 million. However, the evidence suggests that the additional impact that the Cultural Olympiad had on visitor numbers over and above the sporting events was relatively small; in other words, most of these visitors would have come to the UK anyway. Less than a third (approximately 38,000) of these visitors came to the UK primarily for the Games, of which the majority (30,000) also attended a ticketed sports event. Two-thirds of those who attended a Cultural Olympiad event but did not visit the UK primarily for the Games said that their visit was “definitely not” or “probably not” influenced by the Games while only 3% said that they would not have visited the UK otherwise.

The London 2012 Tourism Impact Assessment estimated that 34,000 of the 126,000 overseas visitors who attended a Cultural Olympiad event were additional (in the sense that they would not have visited the UK if it were not for the 2012 Games), accounting for additional spending of £63 million. However, this may overestimate the true impact as many of these visitors would also have attended ticketed sports events, which may have been the main reason for their trip rather than the Cultural Olympiad. This estimate assumes that, unlike the Games themselves, the Cultural Olympiad did not create any crowding out deterring overseas residents from visiting the UK.

(ii) Impact from domestic visitors

The GBTS estimates that 340,000 UK residents visited the Cultural Olympiad, 2012 Festival or any other official Games-related event¹²⁸ as part of an overnight stay between January and October 2012, spending a total of £98 million while, according to the GBDVS, there were a further 2.99 million day visits, accounting for £258 million in visitor expenditure. It should be noted, however, that these estimates are based on relatively small samples.

Relative to Games sporting events, a higher proportion of visits to Cultural Olympiad events took place outside of London. Approximately 57% of overnight visits and 38% of day visits took place outside of London, suggesting a more even impact across the UK. As a comparison, the proportion of visits to sporting events taking place outside London was 41% and 21% respectively.

It is difficult to assess the extent to which the Cultural Olympiad had an additional impact on visitor expenditure at a domestic level. Additionality questions were not asked in the GBTS or

¹²⁶ ONS (January 2013), IPS visit estimates provided to aid national evaluation of the Cultural Olympiad for DCMS

¹²⁷ Confidence interval of +/-25%

¹²⁸ Not including sports events, the Torch Relays, Inspire Mark events or visits to the Olympic Park

GBDVS so it is difficult to assess additionality in the same way as has been done for international visitors

Employability and skills development

4.12 How many workless people were helped into sustainable employment as a result of preparing for and staging the 2012 Games and the conversion of legacy venues across the UK, and how?

The Games represented a one-off opportunity to provide workless people with a pathway to sustainable employment. A large number of employment initiatives with a connection to the 2012 Games were taken forward across the UK's nations and regions. The national employment legacy is being delivered through a partnership approach involving the Department for Business, Innovation and Skills, Skills Funding Agency (SFA), Job Centre Plus and regional bodies. The SFA has contributed significant levels of match funding to a number of the key legacy initiatives, including Personal Best which offered a qualification geared towards becoming a Games-time volunteer.

The Greater London Authority's (GLA) Olympics Jobs Evaluation¹²⁹ described this opportunity as significant because of the volume of jobs (estimated before the Games to be 100,000), the suitability of many of these jobs for people with entry-level skills and the accessible location of jobs in areas of high rates of worklessness. It explains that against a backdrop of the recession and constrained funding, a new multi-agency initiative – the London Employment and Skills Taskforce 2012 (LEST 2012) – was established, charged with exploiting the employment opportunities of the Games for workless residents in London. The evaluation notes that LEST 2012 was also “*responsible for identifying and capitalising on the wider employment opportunities presented by using the event as a ‘catalyst’ to improve the coordination and funding of employment and skills provision, and enthuse those furthest away from the labour market to engage in employment support.*” Therefore, from the outset, the aspiration to help workless people into sustainable employment extended beyond the direct short term job opportunities associated with the preparation and staging of the Games to a wider coordinated effort to create opportunities for workless people through volunteering, skills development and employment brokerage.

Both the preparation and staging of the Games provided a significant number of job opportunities for those that were previously unemployed. The GLA Olympic Jobs Evaluation estimated that some 20,150 Games-time jobs were taken up by previously workless Londoners. Around 15,000 of these jobs were secured through Employment and Skills Brokerage, supported by LEST 2012, which worked with 26 London Organising Committee of the Olympic and Paralympic Games (LOCOG) contractors. This brokerage activity was focused on six sectors: catering and hospitality, cleaning and waste, logistics, retail, event services and security, and traffic management.

The GLA Olympic Jobs Evaluation presented evidence that the Employment and Skills Brokerage project was successful because it was exemplary in its work to coordinate the efforts of a range of agencies, action-orientated (leading to the timely commitment of time and resources) and partners were motivated and enthused by the opportunity of the Games “*to ensure that the project succeeded*”. Specific success factors highlighted include: the coordinating role of the Host Borough Unit, public sector organisations working with private sector contractors in a seamless way, the use of an intranet to share information on vacancies and data sharing protocols and the establishment of a dedicated Job Centre Plus team in Stratford within proximity of the Olympic Park. The net effect of Games-time recruitment effort of LOCOG, the Host Borough Unit, Job Centre Plus, GLA, and the Host Boroughs is reported to be 1,738 workless people from the Host Boroughs obtaining jobs.

¹²⁹ SQW (2013) *Olympic Jobs Evaluation*. Final Report to Greater London Authority.

Employment and skills initiatives that happened because of the Games, including LEST 2012 in London and national initiatives such as Personal Best, helped many workless people towards active labour market participation, into work and into sustainable employment.

The GLA Olympic Jobs Evaluation drew together evidence to assess the number of workless London residents securing Games-related employment (expressed in gross terms so not accounting for deadweight, substitution or displacement). The estimates are presented in Figure 4-14. These estimates include the outputs of the LEST programme described above and employment generated during the Games and jobs created indirectly in developments catalysed by the Games (e.g. Westfield) which were taken up by people who were previously out of work¹³⁰.

Figure 4-14: Estimated workless people into work from GLA Olympic Jobs Evaluation

Project and time period	Lower bound estimate	Upper bound estimate
LEST end 2010/11	26,341	36,355
LEST 2011/12 – end 2012	10,328	10,328
GLA Employment and Skills legacy projects from 2011	2,836	2,836
LOCOG/LOCOG contractor workforce	20,150	20,150
Indirect employment in 2012	1,810	5,600
Indirect employment, Foreign direct investment	284	781
Total	61,749	76,050

Source: SQW (2013) Olympic Jobs Evaluation. Final Report to Greater London Authority

As noted, these estimates above do not take account of deadweight and displacement. Beneficiary surveys carried out for the London Development Agency (LDA) and GLA evaluations led to estimates that 34 % of outputs of the Employment and Skills Legacy Programme and 32% of outputs of earlier LDA-supported LEST 2012 projects were additional to those that would have otherwise been achieved. The GLA Olympic Jobs Evaluation reports that this is positive with reference to benchmarks for interventions to ‘match people to jobs.’¹³¹

There are likely to be substantial on-going benefits from re-engaging those furthest removed from the labour market so that they are actively seeking employment. The scale of labour market re-engagement associated with these initiatives is not quantified comprehensively (i.e. the extent to which participants have stayed in the job they secured or moved quickly into another job, education/ training or actively seeking work). A beneficiary survey of 500 participants found that 60% of those who had gained employment were still in employment. Of those that had left their job, 23% were in the job for at least six months. This points towards to some success in using the Games to bring people back into the labour market.

4.13 How many people have developed new skills (and moved into sustainable employment) as a result of 2012 Games-related skills initiatives across the UK, and how?

There has been a range of skills development activities inspired by the Games and supported by the LDA, GLA, SFA, Association of Colleges, Universities, European Social Fund and other stakeholders. These initiatives have used the Games as a hook to engage people in improving skills, employability or volunteering. Sector skills initiatives have also been advanced to promote access to Games-time employment.

¹³⁰ SQW (2013) *Olympic Jobs Evaluation*. Final Report to Greater London Authority.

¹³¹ *Ibid*

In London a number of skills initiatives were funded through the LEST 2012 programme. In the years leading up to the Games, the Games-related sector training project supported sector initiatives designed to enable London residents to access related jobs in the media, construction, catering, tourism and land-based sectors. The London Employment and Training Framework project focused specifically on local labour activities including improving job-readiness. Across the full suite of LEST 2012 projects 27,000 skills general and skills development outputs and 2,200 Level 2 qualifications were achieved (all gross figures).

Other examples of sector skills initiatives included:

- **Construction:** In support of the ODA's commitment to provide training, skills and employment opportunities for local people, the National Construction College (NCC) developed a training programme for construction skills at dedicated National Skills Academy for Construction (NSAFC) training sites around the Olympic Park. Around 1,500 people who had been out of work for some time developed skills through a general introduction to specialist construction operations such as health and safety and plant machinery. The programme also supported job entry by offering support with letter writing for example. Around 500 people found employment following their involvement in this scheme.
- **Sport and leisure:** The London Coaching and Bursary Model which provided support for 2,090 participants in London to gain a coaching qualification, especially a higher level qualification (Level 2+), and in the East of England the Leading the Field project which offered fully funded training courses for individuals employed or regularly volunteering in the sport and active leisure sector, enabling 750 people to gain a coaching qualification.
- **Security:** The Bridging the Gap initiative enabled 4,000 people to participate in training geared towards stewarding and door supervision qualifications.
- **Retail:** The Westfield Skills Place, supported by the European Social Fund, provided adults over 18 years with skills and employability support they needed to gain employment/ start new apprenticeships with employers who were located within Westfield Stratford City. Individuals who successfully completed the pre-employment training offer could apply for and gain an interview with employers located in Westfield Stratford City. Newham College started 1,137 individuals on a pre-employment programme of which 50 had secured employment as of mid-2012.
- **Young people:** A Host Borough skills initiative supported 14-19 year olds to gain skills in sectors related to the Games and in some cases working with LOCOG contractors. Supported by the European Social Fund, 2,276 individuals were enrolled in this skills programme. A 'Creativity in Sport' project in Reading, known as Body Rocks, involved socially excluded young people in sport, using the inspiration of the Olympic and Paralympic values. The programme enabled them to acquire fitness training skills as Body Rock instructors, building their self-confidence and supporting behaviour challenges which the aim of helping individuals return to education, employment or training. The ARK project in Cornwall delivered street dancing classes to school age young people. As well as promoting community engagement this project aimed to improve confidence and learning that could be applied when the young people enter employment.

Volunteering roles associated with the Games also stimulated a range of training initiatives. Across the UK, Personal Best – a pre-volunteering programme – used the excitement generated by the opportunity to become a 2012 Games-time volunteer, to engage unemployed people in employability training and to work towards a Level 1 Personal Best qualification. This £6.8m initiative included the provision of Personal Best Advisers and reimbursement of travel and childcare costs to improve access for those with barriers to participating in training. Around 8,600 people enrolled on this programme and more than half of these achieved the Level 1 qualification (4,462). Monitoring data records the destination of some of these individuals following their involvement with the Personal Best programme with 240 moving into employment, 736 choosing to progress further with education and training and 181 choosing to continue volunteering.

In the East of England, the Team East for Skills Programme was created to help local people get into employment or enterprise by using the inspiration of the Games. Through it they improved their skills, got involved with volunteering and/ or found jobs. The programme was funded by the European Social Fund and the East of England Regional Development Agency and had a total budget of £2m. Between February 2011 and February 2012, the programme supported seven groups of people: the unemployed, the economically inactive, those with disabilities, those with health conditions, lone parents, those from black and minority ethnic backgrounds, and women

Stakeholders consulted for the meta-evaluation highlighted that the main focus on opening up Games-related employment to those furthest removed from the labour market (the workless and young people not in education, employment or training) and more generally using the Games as a means to promote engagement was ambitious and has resulted in strategic benefits. Stakeholders reported the Games have left a legacy of improved coordination of skills and employment initiatives through the links that have been established, particularly at the local level. There is also reported to be an increased emphasis on the role that culture, arts and sports can play as a hook to support engagement in learning, volunteering and employability support.

Games skills initiatives and employment initiatives which included a training aspect supported a large number of individuals to improve their skills and to gain qualifications. Wider evidence suggests that this support could lead to a 15% increase in wages for up to Level 2¹³² and all those supported with lower level skills development have the potential to progress to higher level skills in time, potentially leading to longer term economic benefits.

4.14 To what extent have the 2012 Games been used to improve standards and access to employment opportunities amongst disabled people, including through volunteering, skills development and through changing employer perceptions?

The approach to preparing for and delivering the Games set high standards for economic inclusion of disabled people. Both the ODA and LOCOG adopted procedures which encouraged partners to work towards targets for making employment opportunities accessible for disabled people. This was supported by a range of advisory forums and boards and underpinned by a strongly strategic approach to equality and diversity objectives. The LOCOG target was met although ambitions were not met for representation of disabled people in the workforce employed by ODA to build the Olympic Park and Athletes' Village. The legacy of this activity is that contractors have been exposed to higher employment standards and the benefits of positive action promoted through the Games.

One of the five objectives of the London 2012 Equality and Diversity Forum was to ensure that disabled people benefited from the jobs available through the Games. Both the ODA and LOCOG established targets for ensuring that disabled people had access to employment opportunities associated with the preparation and staging of the Games.

From the outset, the ODA had processes in place to drive equality and inclusion, with prospective contractors required to demonstrate the diversity of their workforce, the steps they had taken to promote equality in the workforce and the extent to which regular training is available to their staff. The ODA's Equality, Diversity and Inclusion Board, which formally integrated employment and skills early in 2010, was chaired by the Chief Executive. It was responsible for overseeing the delivery of the ODA's integrated equality scheme 2009-2012 *Everyone*¹³³ and the Jobs Skills Futures strategy.¹³⁴ It has been reported that the ODA's approach to positive action set a standard for the construction industry,¹³⁵ offering work experience and providing disability awareness training. However, performance in encouraging take up of jobs by disabled people was below target. ODA monitoring data up to December 2011 show that 1.1% of people employed on the Olympic Park and Athletes' Village were disabled, below the ODA benchmark of 3%.

¹³² Department for Communities and Local Government (2010) *Valuing the Benefits of Regeneration*

¹³³ Olympic Delivery Authority (2009) *Integrated Equality Scheme 2009-2012 Everyone*

¹³⁴ London 2012 Equality and Diversity Forum (2011) *Third Annual Report: Working towards an Inclusive Games*

¹³⁵ Equality and Human Rights Commission (no date) *Equality and diversity good practice for the construction sector*

The ODA Job Brokerage, which worked to engage local residents and provide them with support to access jobs on the Olympic Park and at other ODA venues, performed well against its equality targets. Around 6% of the people engaged through this target were disabled (against the benchmark of 3%). The GLA Jobs Evaluation report found that the Employment Legacy project struggled to engage disabled beneficiaries although it is not clear why.

LOCOG's approach to recruiting its own workforce and contractor workforce was considered to be best practice¹³⁶. For example, LOCOG required prospective contractors to carry out a Diversity Works Assessment which is a self-assessment tool to help organisations understand their performance in relation to diversity. LOCOG exceeded targets for having disabled people as part of both its Games-time workforce and that of contractors. Around 9% of the workforce was disabled compared with the target range of 3 to 6%.

LOCOG implemented plans to ensure volunteering opportunities were accessible to disabled people, including opening the application process for disabled people early, training recruitment staff to provide an inclusive and accessible experience and ensuring that selection events were inclusive. The demographic data for Games Maker reveals that the proportion of volunteers who were disabled was 4%, which is within the target range of 3 to 6%.

Opportunity Inspired by 2012 provided support for a total of 693 young people, significantly exceeding the target of 500 set at the outset. Participants were those who had faced numerous challenges in accessing employment, training and volunteering in the past. They were supported to develop a range of hard and soft skills, particularly confidence and self-belief, and some young people were able to progress to further volunteering, employment and training. Participant data suggests that 17% were disabled.

The Young Leaders programme met its target of engaging 100 disadvantaged 16 to 18 year olds and it is estimated that 11% were disabled (including those who reported learning difficulties and long-term or mental health illness). More than four in five Young Leaders (84) recorded positive outcomes in terms of moving into work, training, volunteering or education, although the figures for disabled people specifically are not reported.

Disability

4.15 To what extent have the 2012 Games been used as a vehicle to increase standards and access to business opportunities amongst disabled people?

The key way in which disabled led businesses were supported to access Games-related opportunities was through the CompeteFor portal, which enabled small and medium sized enterprises to gain access to and apply to deliver Games contracts.

Overall, there is currently limited evidence to suggest the Games have to date left a legacy of improved access for disabled people to business opportunities.

(i) The CompeteFor portal

The CompeteFor portal captured background data on businesses which enabled the uptake of business opportunities by disabled led companies to be tracked. Quantitative or historical baseline information was not available to track the level of involvement of disabled led businesses in previous Games. CompeteFor monitoring data indicates that 1.4% of all businesses registered on the system were disabled-owned businesses.¹³⁷ However, this data only provides an understanding of the opportunities created for small and medium sized enterprises and does not provide any evidence of the numbers or value of opportunities provided to publicly owned companies, large and multi-national companies and how far disabled people/

¹³⁶ London 2012 Equality and Diversity Forum (2011) *Third Annual Report: Working towards an Inclusive Games*

¹³⁷ The number of organisations that have answered yes to the question: "Is over 50% of your organisation owned or led by disabled people?"

staff/ shareholders might have benefitted. In the context of the Games this excludes some of the largest contracts which potentially would have had the most economic impact.

(ii) Olympic organisers' procurement protocols

The ODA had an Integrated Equality Scheme which aimed to increase the number of talented but underrepresented people in the workforce. In addition, LOCOG operated a staff recruitment policy which adopted best practices in terms of recruitment of staff from equality groups, specifically people with disabilities. The ODA designed its procurement approach to be inclusive and used a 'balanced scorecard' that took equal opportunities and social inclusion into account. Companies bidding for contracts had to ensure they had a diverse workforce and monitored recruitment. Stakeholders believe this did have an effect on outcomes. For instance, the ODA ensured that G4S, the Games' security contractor, used a range of initiatives to ensure people who traditionally did not apply for security roles were included in their recruitment processes, including disabled people.¹³⁸ The process included job fairs and peer work involving security staff from under-represented groups to help promote the opportunities and to attract disabled people to apply. Disabled candidates were invited to attend specific information sessions and flexible work patterns and shifts were made available. Case studies of this work demonstrate that "*the response rate to these initiatives by women and disabled candidates was very positive, with an outcome that saw a greater representation among the Tier One contractor's workforce from these ...historically underrepresented groups.*"¹³⁹ However, a lot of the work in this respect was for Games-time only. The approaches could therefore be adopted in ongoing work.

4.16 To what extent have the 2012 Games resulted in increased standards and accessibility for disabled tourists visiting the UK (and associated levels of satisfaction and disabled visitors)?

There is very limited evaluation evidence on the impact of the Games on increasing standards and accessibility for disabled tourists so it is difficult to draw firm conclusions on the role and influence of the Games in this area. The evidence in this section is largely based on the views of stakeholders interviewed for the meta-evaluation.

Tourism stakeholders generally reported that there has been some qualitative improvements in stakeholder attitudes and services for disabled tourists. Stakeholders felt some, but certainly not all, of this was due to the Games. They felt the Games probably accelerated some of the change.

Key stakeholders (e.g. Government, LOCOG, sector bodies and tourism/ leisure sector private companies) came together via the Accessible Tourism Stakeholder Forum to plan for the Games. The Forum identified priority areas for Games-related activity.

The key activities linked to improving accessibility for disabled tourists were:

- Customer service staff training to raise awareness of disabled tourists' needs;
- Work to improve the availability of accessible hotel rooms;
- A customer information website which shared information on accessible tourist facilities; and
- Lasting improvements made to the public realm on London's Southbank.

The remainder of this section will examine each of the activities listed above in more detail and consider changes in the number of disabled visitors to London and the UK.

(i) Staff awareness training

Existing disability awareness training and activity and initiatives were enhanced and built upon in time for the Games. The GLA sponsored project 'Destination London' provided an online leaflet and training pack for staff in the hospitality sector that aimed to improve attitudes and

¹³⁸ ODA (2011) *Learning Legacy: Attracting historically underrepresented talent*

¹³⁹ *Ibid*

awareness of disabled tourists' needs. Some stakeholders reported that the uptake of the pack was not as high as they had wished and that packs were not ready in advance of the Games to enable training to be embedded. Other stakeholders reported hotel chains and other major players were improving their staff training around disability awareness during Games-time; however, there was no formal audit of the extent of this. Evidence of this activity was therefore piecemeal and was not evaluated for impact.

(ii) Accessible hotel rooms

Research suggests that in 2010 there were around 2,000 accessible hotel rooms in London, equivalent to 2% of the existing stock of hotel rooms¹⁴⁰, but there is no historic data to compare this to and no updated data since. Consultations and desk research reveal there was no additional public investment made to grow the number of accessible hotel rooms in advance of the 2012 Game; however, the stakeholder engagement work described above was ongoing in the build up to the Games to encourage leisure and tourism sector stakeholders to boost the accessibility of their hotel rooms. Some stakeholders reported they were aware of hotel chains, or pub chains for example, making extra efforts during Games time to support disabled visitors. Tourism stakeholders also reported that the hospitality industry had started to pay greater attention to the needs of disabled customers, whereas before the Games, it was felt businesses “*paid lip service*” to disabled customers.¹⁴¹ In general stakeholders felt some, but not all, of this effort was due to the Games and that the Games had probably accelerated some of the changes.

(iii) Accessible tourism website

A website, Inclusive London, was commissioned and funded by the GLA and offered visitors the opportunity to search accessibility information about 35,000 tourism businesses in London. This website was specifically funded and developed for the Games but has remained online post-Games and the GLA has noted that their financial and strategic commitment to the site remains for the foreseeable future.

(iv) Public realm improvements

The most significant commitment funded by the GLA for the 2012 Games was a £4 million investment in public realm improvements (e.g. resurfacing and addition of lifts) to the London Southbank to make it accessible to disabled tourists. This was intended to be a high profile Games-time development, echoing the accessibility developments put in place at previous Games, such as the lift improvements that were added into the Great Wall of China at the Beijing Games. Stakeholders reported this public realm improvement happened because of the Games and that it would not have been funded otherwise. Wider stakeholders were also of the opinion that this development had been “*visionary*” and was one that will remain for a significant number of years. A report on the improvements has been commissioned but it was not available at the time of writing.

(v) Disabled visitors

UKTS data from 2009 shows that around 11% of all overnight domestic trips in England between January and June 2009 were made by groups of visitors including at least one person with special access needs.¹⁴² This amounts to 11.28 million trips (there was no trend data available as this was a one-off module in the regular survey; therefore we cannot say whether the volume of disabled travellers has changed).

UK residents with a health condition or impairment and their travelling party spent almost £2 billion on overnight trips in England, but again no trend data was available to estimate whether

¹⁴⁰ London Development Agency (2012) *Accessible Hotels in London*

¹⁴¹ Source: Stakeholder feedback

¹⁴² UKTS data for 2009, a question on accessibility was added in 2009 for one calendar year only

this is rising or falling.¹⁴³ In general, a higher proportion of adults with impairments experience barriers to going on holiday than adults without impairments (66% and 55% respectively).¹⁴⁴

Overall in terms of improving tourism opportunities for disabled people, a number of projects and initiatives took place as a result of the 2012 Games that would not have happened otherwise and it is apparent through the limited evidence available that the Games was a catalyst for a positive level of stakeholder engagement with accessible tourism stakeholders in London. Several developments, such as the public realm improvements on the Southbank and the Inclusive London website, remain available for disabled tourists as part of the legacy; however, a lack of hard data and limited evaluation in this area limits the extent to which effects and impacts of this activity can be identified and quantified. Stakeholders concluded that the joint work undertaken to improve customer service for disabled people makes the tourism experience better for everyone, and should be built into planning for future mega-events and future Games.

4.17 To what extent have disabled people benefited from more accessible transport services and improved mobility, as a result of the 2012 Games?

The GLA, Transport for London (TfL) and ODA undertook a number of accessible transport improvements linked to the Games with the specific aim of enabling disabled people to access the venues. The work focused on three strands: physical infrastructure (specifically tube, rail, buses); staff awareness/staff training; and access to information and customer feedback. Overall, more than £6.5 billion was invested to improve the transport network and ensure the smooth running of the Games.¹⁴⁵ TfL publications state this included 'record levels' of investment in transport accessibility in time for the Games.¹⁴⁶ In addition to core funding, the ODA contributed £4 million to TfL for accessibility enhancements, such as Docklands Light Railway lift refurbishments and platform train interface improvements (humps) at a number of London Underground stations.

Evidence on the role of the Games in improving transport accessibility can be pieced together from various sources of data and interviews with stakeholders undertaken for the meta-evaluation. Generally there is positive evidence on the role that the Games have played in driving forward accessibility improvements and encouraging greater disabled usage. The paragraphs below consider these improvements by the different modes of transport.

(i) Tube network

London's tube network was subject to an ongoing programme of tube station upgrades, some of which was additional work as a result of the Games. For example, 250 wider aisle gates were installed and 24% of tube stations also had step free routes. By the time of the Games, 66 tube stations were step free including important interchanges at Green Park, Blackfriars, Farringdon and Kings Cross/St Pancras and stations serving Games-time venues (Earl's Court, Southfields and Stratford for the Olympic Park). All Jubilee line stations from Green Park to Stratford were step-free from street to train. Step free access in Southfields station took place due to the Games and its need to serve the tennis venue at Wimbledon, and would not have happened otherwise. Manual boarding humps were used at 16 tube stations and these proved popular and have been retained post Games as a legacy benefit.

(ii) DLR

On the Docklands Light Railway (DLR), lift upgrades funded by the ODA helped increase capacity for disabled users of the line.¹⁴⁷

¹⁴³ UKTS

¹⁴⁴ ONS, Life Opportunities Survey – Interim Results, 2009/10

¹⁴⁵ Greater London Authority (March 2012) *Leaving a transport legacy. Olympic and Paralympic Transport Legacy Action Plan*

¹⁴⁶ Transport for London (2012) *Travel in London Report 5*

¹⁴⁷ Transport for London (2012) *Travel in London Report 5*

(iii) Buses

Though all buses have been accessible to wheelchair users since 2005, the proportion of accessible bus stops has more than doubled since 2008 to more than 68%.¹⁴⁸ This figure has shown the greatest increase of any transport type.¹⁴⁹ These improvements will leave a lasting legacy for bus stops, with changes including dropped kerbs, rubble strips, and tactile pavements. One stakeholder reported that pre-Games there was already a trend to increase the number of accessible bus stops and the Games boosted or sped-up that process. In February 2013, the Mayor set aside an additional £18 million to reach a target to get 95% of bus stops accessible to be achieved by 2016.¹⁵⁰ Stakeholders felt that the goodwill generated by the Games, alongside campaigning by organisations like London TravelWatch, had contributed towards this and in this respect the Games has “*raised the ambition level*”.

(iv) Rail network

On the rail network in London, 37% of all London's rail stations were step-free from street to platform. Additionally, there has been investment in train improvements and new trains such as improvements to the London Overground service.¹⁵¹

(v) Travel information and support for disabled travellers

Travel information was also improved for the Games; the London Journey Planner was improved to provide better information on accessibility and to allow disabled travellers to book assistance for Games-related journeys. Feedback indicated this was a notable improvement; the new planner could tell disabled travellers exactly how many steps there were, what escalators are there, etc. This was evidently better than the usual TfL Journey Planner which was reportedly not always reliable on accessible transport information. The website improvements will remain as a legacy.

Signage was also enhanced during Games-time with the adoption of a cyan colour scheme and the feedback was that this made journeys easier for disabled travellers such as those with visual impairments, rather than the usual blue signage.

During Games-time, additional support was also provided for disabled travellers via an enhanced level of assistance via additional staffing and volunteers. Staff were available to operate the manual ramps and to help disabled people board trains.

Customer feedback was collected by TfL to monitor disabled users' views of the services:

TfL monitored disabled peoples' journey experience during the Games, both via social media and through other customer research methods including individual video logs completed by disabled people throughout Games time. On the whole, the data from this research demonstrated that disabled customers found that the range of accessible transport options and information available meant that travelling during the Games was easier than they had expected it to be.... Comments around the physical access of vehicles and stations increased during the Games and the sentiment was greatly improved. Other areas that saw an improvement in sentiment included staff helpfulness and availability, awareness of network changes, and signage.¹⁵²

Specifically, bus travel received the most consistently positive feedback; however, there were comments that were received that drivers were perceived as rude or about drivers that failed to enforce regulations on wheelchair space (e.g. moving prams). Perceptions of the tube improved

¹⁴⁸ *Ibid*

¹⁴⁹ *Ibid*

¹⁵⁰ Transport for London (2013) *Better bus stop access*. Available at <http://www.tfl.gov.uk/corporate/media/newscentre/metro/27170.aspx>. Accessed April 2013.

¹⁵¹ Greater London Assembly (March 2012) *Leaving a transport legacy. Olympic and Paralympic Transport Legacy Action Plan*

¹⁵² Transport for London (2012) *Travel in London Report 5*

greatly when compared with a similar business as usual period. Manual boarding ramps were generally well received and many hoped they would be available post-Games.

(vi) Staff attitudes and awareness

In terms of staff attitudes, stakeholders reported they had received feedback that staff in the main underground stations (e.g. Stratford, Westminster) were well trained but that was not always the case everywhere throughout the network, and there were sometimes reports of bus drivers not enforcing disabled access rights on their buses. Stakeholders indicated that travellers reported the Games-time volunteers were more approachable, more helpful, and better trained than the usual transport staff. The general view was that Games-time volunteers provided a better level of service than was normal.

(vii) Summary of legacy improvements

In terms of the legacy for disabled people, the boarding ramps at 16 stations will be retained, and customer feedback is being used to highlight and prioritise future actions and improve signage and websites. There are also plans to develop a mobile phone application to share such information with disabled users. The Mayor of London will publish a detailed plan of action for the required accessibility improvements which will be delivered over 2013-17, and TfL will publish yearly progress reports on these actions from October 2013.

The overall perception of stakeholders was broadly that disabled access to transport during Games time had been a success. Stakeholders from inside and outside Government reported that due to the improvements, disabled people were able to use transport more than usual. This was described by stakeholders as a “*golden halo effect*” (i.e. it triggered wider positive feelings) and passenger ratings during Games time were the highest recorded. Stakeholders reported that some disabled users were able to use the tube in Games time who would not have done so before and this may lead to them being more likely to use public transport in the future.¹⁵³ There was some evidence of displacement of resources to offer a successful Games-time accessible transport system, as one charity reported some diversion of bus assistance during Games time to help Games volunteers. The dial a ride/ community transport systems offer disabled users one return journey a week on average. During Games-time, charities received a handful of complaints that disabled users could not access these services because they were diverted to supporting Paralympic Games volunteers.

However there was a concern that while in Games-time, access to travel was successful, since the Games ended, the general perception was that “*we have gone back to where we were before*”. The perception was that the level of complaints received about public transport access are now rising again; however, hard figures were not available. This was felt to be because the level of investment in support for disabled travellers during Games-time (particularly through the various volunteer programmes) was not able to be sustained beyond the life of the Games. It was also because many of the improvements were only for Games-time and were dismantled post-Games. Stakeholders also reported that before and during the Games, there was a clear rationale and joined up approach to working together among all key transport stakeholders. There was a feeling that this co-operation had fallen back post-Games as staff went back to business as usual and that some of the positive momentum for disabled travellers had been lost.

¹⁵³ Source: Stakeholder feedback

Sustainability

4.18 To what extent was sustainability integrated into the planning, design and governance of the Games, and what were the practical benefits of this?

The available evidence generally provides an extremely positive assessment of the integration of sustainability into the planning, design and governance of the Games. Key features of the approach include the establishment of a commission to provide an assurance function on sustainability, the use of a design review panel to ensure the Olympic Park met the highest standards of sustainability in building design and the governance role of the London 2012 Sustainability Group which included all of the key stakeholders. The assessment draws mainly on the reviews completed by the Commission for a Sustainable London 2012 (referred to in this report as 'CSL'), the independent body which monitored and assured the sustainability of the 2012 Games.

The use of sustainable design approaches, and planning for sustainability more generally, were important pre-requisites for ensuring good practice sustainability approaches were adopted in the development of the Olympic Park and construction of its venues, as well as ensuring that the use of the venues generated environmental benefits during the Games. Environmental sustainability has also been an important consideration in the long-term development of the Olympic Park through the legacy uses of the venues.

When London bid to host the Games it promised to have independent monitoring of the sustainability of its activities. CSL was set up in January 2007 to fulfil this promise. This was the first time such a commission had been established to provide this assurance function on sustainability for an Olympic Games. CSL has produced a series of comprehensive and critical reviews on the sustainability practices of the ODA and LOCOG. At various stages of the Olympic Park development and Games preparation, CSL made recommendations on how the delivery of sustainability objectives could be improved. Many of these recommendations were taken on board by the ODA and LOCOG. As a result, CSL contributed to the practices and outcomes that were the subject of its own assessments.

The CSL reviews, which provided a key source of evidence on the integration of sustainability into the planning, design and governance of the preparation and staging of the Games, have consistently commended the ODA and LOCOG on their approaches. The reviews have also highlighted a number of good practice approaches which can provide guiding principles for the delivery of future mega events as well as the development of the Olympic Park in legacy.

(i) The Impact of the Commission for a Sustainable London 2012

CSL was a successful as well as innovative initiative. An evaluation was commissioned to assess whether CSL added any value to the 2012 sustainability programme that could not have been obtained through other available means.¹⁵⁴ The evaluation is a synthesis of and reflection on the views of the internal and external stakeholders contacted. A degree of caution is therefore necessary in drawing firm conclusions from the evaluation. However, its key conclusions were as follows:

- The level of additionality provided by CSL is uncertain; however, of the delivery body stakeholders, the vast majority felt that CSL added significant value to the sustainability of the London 2012 Games programme.
- In the early period of CSL the focus was on ensuring sustainability was embedded within the overall governance arrangements and strategy for the London 2012 Games. The impact of this 'embedding' activity is extremely difficult to quantify, particularly retrospectively, but in helping to build understanding of sustainability and establishing a direction of travel, it may well have been significant.

¹⁵⁴ CAG Consultants (March 2013) *Independent Evaluation of the Commission for a Sustainable London 2012. A report to CSL*

- The evidence suggests that CSL provided leverage within the delivery bodies to influence senior managers and decision makers on sustainability issues.
- It was not within the scope of the evaluation to analyse the precise role of CSL's recommendations, along with other CSL activity, in securing sustainability outcomes; however, some of the language used by CSL in reporting on these recommendations suggests that in some cases it is likely that action would not have been taken without their intervention.

The International Olympic Committee (IOC) also provided positive comment on CSL, concluding "*The Commission is obviously highly regarded by diverse interests and, from all accounts, provides the public and NGOs with a more open and approachable interface with the sustainability objectives of the Games than could realistically be provided by LOCOG given the other demands on its time and resources*".

(ii) Planning and design approaches

The CSL Design Review undertaken in 2009 concluded that the ODA took a broadly effective process-led approach to sustainability which led to high standards of sustainability being specified. CSL further concluded that the London 2012 Sustainability Plan (first published in November 2007), was central to the vision for 2012. It noted that the plan had a programme-wide commitment to sustainability across all venues and Games-related activities and made it clear that design will play an important role in delivering this – "*The plan identified architecture and urban design as an area requiring cross cutting action on sustainability. This includes environmentally efficient and climate-proofed design, creating new habitat on and around buildings and using design to create inclusive places that boost cohesion and regeneration.*"¹⁵⁵

During 2010, the IOC commissioned an independent review of sustainability arrangements for London 2012, as reported in the CSL Annual Review (2010).¹⁵⁶ The IOC report provided an extremely positive assessment on the integration of sustainability into the planning process – "*the high level assessment from this review is that London 2012 is on track to deliver exemplary performance on integrating environmental management into construction and sustainability into procurement and sourcing as well as many other areas of operations*".

The CSL Design Review (2009) noted that sustainability issues were being addressed through:

- A requirement for the Olympic Village to achieve Code for Sustainable Homes 'Level 4';
- Civil engineering works being assessed against CEEQUAL¹⁵⁷; and
- CABE/ Design for London's London 2012 design review panel which consisted of expert advisors drawn from England's architectural, built environment and creative communities.

CSL reviews also highlight the following elements of good practice in planning and design:

- The aspiration of all permanent venues to achieve a BREEAM¹⁵⁸ 'excellent' rating in legacy with ODA and BRE working together to develop a bespoke version of BREEAM to be applied to sport venues and the Park itself, providing a legacy for future construction of sport venues;
- Environment and Sustainability Management System (ESMS) developed with the ODA Delivery Partner which was certified to ISO 14001¹⁵⁹ (also see section 3.20);
- The London 2012 carbon footprint study that takes into account embodied and operational emissions from bid win to closing ceremony;

¹⁵⁵ Commission for a Sustainable London (2009) *Design Review*

¹⁵⁶ Commission for a Sustainable London *Annual Review 2010 Game Changing*

¹⁵⁷ Scheme which provides a rigorous and comprehensive sustainability rating system for project and contract teams, celebrating the commitment – and demonstration – of the civil engineering industry to achieving high environmental, economic and social performance

¹⁵⁸ Building Research Establishment Environmental Assessment Method

¹⁵⁹ ISO 14001 is a management standard which sets out the criteria for an environmental management system.

- The ODA Sustainable Development Strategy and LOCOG's Sustainable Sourcing Code, which set out four sustainability considerations when sourcing materials: responsible sourcing; use of secondary materials; minimising embodied impact and healthy materials; and
- A Biodiversity Action Plan for the Olympic Park, which set out the commitment to 45 hectares of ecologically managed habitat and what habitats this will be made up of and the production of a proposed 10 year management plan for the park.

(iii) Governance

The CSL Pre-Games review indicates that the London 2012 Sustainability Group played a key role in ensuring that sustainability was integrated into the governance of the Games. The Group was co-chaired by the GLA Executive Director of Environment and Development and the Department for Environment, Food and Rural Affairs's (Defra) Director for Sustainable Development. It was attended by Heads of Sustainability for the key stakeholders and contributors from significant wider stakeholders such as DCLG, Defra and NHS London. The CSL Pre-Games report concludes that the London 2012 Sustainability Group provided clear leadership over all aspects of sustainability.¹⁶⁰ CSL indicated that the London 2012 Sustainability Group was instrumental in the publication of the ODA's learning legacy website, which aims to share the knowledge and lessons learned from the London 2012 construction project to spread good practice within the construction sector and to act as a showcase for UK industry.

CSL reports highlight the following other features as positive aspects of the governance of sustainability in the preparation and staging of the Games:

- LOCOG's effective engagement with partner organisations with significant sustainability impacts and the delivery of an effective engagement programme to ensure consistency;
- LOCOG's Pre-Games Sustainability Report¹⁶¹ which was prepared in accordance with the new Global Reporting Standards (GRS) for major events and was independently certified with an A rating. CSL note that LOCOG contributed substantially to the development of this standard;¹⁶²
- LOCOG's management system complied with BS 8901, which requires organisations to understand the sustainability issues relevant to their event(s) and to put in place measures to control and minimise these impacts; and
- During the Games, the LOCOG sustainability team was assigned to compliance monitoring across all venues or roles supporting the LOCOG communications team.

(iv) Approaches in legacy

The CSL Legacy Review (2012) acknowledges the substantial strides made by Olympic Park Legacy Company (now the London Legacy Development Corporation or LLDC) towards a comprehensive approach to governance for sustainability and that the new governance structures adopted by the LLDC should ensure that environmental sustainability is considered in a cross-cutting manner across the organisation.

CSL also welcomes the LLDC's commitment to establishing an external design quality panel to peer review the organisation's approach to the design of the urban environment. It is argued that this could be further strengthened by ensuring that the LLDC Board includes a post with dedicated sustainability responsibilities and by considering how its work can be externally assured, as well as broadening its external advice beyond design/spatially related matters.

In its Legacy Review (2012) CSL urged the LLDC to take further action to develop sustainability policies which led to the LLDC publishing a comprehensive sustainability policy.

¹⁶⁰ Commission for a Sustainable London (2012) *Pre-Games Review: Breaking the Tape*

¹⁶¹ London Organising Committee of the Olympic and Paralympic Games (2012) *Pre-Games Sustainability Report*

¹⁶² Commission for a Sustainable London (2012) *Pre-Games Review: Breaking the Tape*

CSL notes that the LLDC has published its environmental sustainability strategy and has committed to recruit a senior dedicated resource to manage sustainability and innovation streams within the organisation.¹⁶³

4.19 To what extent were the Olympic venues and Village designed and constructed in the most sustainable way, and what were the benefits of this?

The available evidence indicates that almost all the commitments in the ODA's Sustainable Development Strategy with respect to design and construction were achieved or exceeded, or were on target to do so at the time the report was drafted. The strategy is highly regarded by stakeholders who generally believe that the ODA has helped to establish new benchmarks on sustainability for large-scale infrastructure projects. As detailed above in section 4.18, the reviews completed by the Commission for a Sustainable London 2012 (CSL) provide a key source of evidence in answering this research question.

The ODA was committed to ensuring that the Olympic Park project incorporated best practice approaches to resource use, waste minimisation and low carbon performance. In its 2011/12 annual review¹⁶⁴ CSL asserts that throughout the project, the ODA demonstrated exemplary standards of construction sustainability. The report highlights that there is clear evidence that standards were applied and enforced through the procurement, risk management, and contract management processes, and in everyday construction on site:

there is no magic formula for this success. The ODA appointed professional sustainability staff from the outset (sustainability professionals were among the very first cohort of ODA staff), researched and developed a comprehensive and clear set of targets and managed them rigorously through the supply chain. The use of outcome based targets was very beneficial, enabling innovation by the various project teams and suppliers. The use of frameworks such as BREEAM, CEEQUAL and Code for Sustainable Homes worked well in terms of setting clear standards for developments that have been achieved.

In successive reviews CSL highlighted a number of factors which contributed to the Olympic Park achieving recognition as an example of a successful sustainable construction project. The key factors identified by CSL, which are explored in detail in sections 4.18 and 4.20 include:

- Commitment from the ODA Board and management;
- Clear policies and targets;
- An effective sustainability management system;
- Robust monitoring and assurance; and
- Site-wide contracts.

CSL reports that the ODA's approach to construction and infrastructure development was endorsed by the Environment Agency and other statutory bodies such as the Health and Safety Executive and Natural England.

The ODA's Sustainable Development Strategy (2007) set a number of key targets relating to design and construction. Drawing on CSL's assessments the table (Figure 4-15) below sets out the key targets and includes an assessment of whether they were met.

¹⁶³ Commission for a Sustainable London (2012) *Pre-Games Review: Breaking the Tape*

¹⁶⁴ *Ibid*

Figure 4-15-: Sustainability Achievements against Targets – Construction and Design

Theme	Targets	Was target met?
Carbon	Permanent venues will aim for a 15% reduction in carbon emissions above 2006 Part L Building Regulations.	Yes
	The Olympic Village will be 25% more energy efficient than current Building Regulations	Yes
	Renewable energy will provide 20% of the Olympic Park and Village energy demand in the immediate post-Games period in 2013.	No
	To achieve Code for Sustainable Homes Level 4 for the Athletes' Village, resulting in a 44 per cent reduction in carbon emissions;	Yes*
	Permanent venues to achieve a BREEAM excellent rating;	Yes*
Water	All permanent venues and non-residential buildings to be designed to reduce water consumption by 40% in operational modes as based on current industry standards.	Yes
Waste	At least 90% of demolition waste to be reused or recycled	Yes
	At least 90% of construction waste to be diverted from landfill	Yes
Materials	Maximise timber from sustainable sources, supported by appropriate evidence as defined by the UK Central Point of Expertise on Timber (CPEIT) with all timber used from known, legal sources, with clear supply chain evidence.	Yes
	At least 20% of construction materials, by value, to be from a reused or recycled source.	Yes
	Achieve a level of 25% recycled aggregate, by weight, for the permanent venues and associated Olympic Park wide infrastructure.	Yes
	50% of materials (by weight) to be transported to and from the Olympic Park by water or rail during construction.	Yes
Biodiversity	The Park will feature 45 hectares of species-rich habitat that can mature into a Site of Importance for Nature Conservation (SINC) of at least Borough Grade 1 status.	Yes*

Source: CSL Reviews

Note: * indicates that CSL are confident targets will be achieved; final assessment is dependent on legacy uses

CSL reviews indicate that almost all the commitments in the ODA's Sustainable Development Strategy relating to the construction process were achieved or exceeded. Notable achievements highlighted by CSL include:

- The Olympic project achieving well over the 90% waste targets;
- the Velodrome being over 30% more energy efficient than 2006 building regulations;
- reducing potable water demand by 75% and the aquatic centre reducing potable water demand by over 30% through reuse of filter backwashing water for non-potable requirements; and
- the stadium having over 30% recycled content.

The target to have a 20% contribution to on-site energy from renewable sources was unable to be met following the failure of a tender process to deliver a large-scale wind-turbine on the Park due to legal issues relating to the design specification.

Box 4-4: Timber

The ODA was committed to using 100% sustainably sourced timber, using timber certified by either the Forest Stewardship Council (FSC) or the Programme for the Endorsement of Forest Certification (PEFC). This had never been done before on a project of this scale. Timber would be used extensively across the site, in many different forms by multiple agencies and organisations. This made it difficult to implement controls on supply. To address this, the ODA established a timber panel of approved suppliers to control the supply of all timber for construction on the Olympic Park. All tier one contractors used the panel to source their timber. The material arriving on site was subject to a range of controls and assurance processes to ensure that it was certified and had appropriate audit trails, known as ‘chain of custody’. According to CSL, this was a fairly resource intensive process; however, it was successful in identifying a small number of deliveries of unverified timber and action being taken to resolve this.

CSL commended the ODA for putting this range of measures in place to ensure that the timber being used in construction comes from certified sustainable sources. The mechanisms for achieving this are part of the learning legacy developed by the ODA and provide the opportunity for other projects to follow them.

CSL’s 2010 Waste Review confirmed that “*the ODA has been resolute at achieving and exceeding its 90% reuse and recycling target for demolition waste. Both its performance and experience have now become a construction industry benchmark*”. The review also concluded that the ODA was meeting its construction waste target to divert 90% from landfill through reuse, recycling and recovery. Though the Commission had some specific concerns around incineration and the destination of waste wood which were subsequently resolved, the ODA’s approach was considered very positive for such a complex and time-sensitive project.

The CSL 2011 Annual Review published in May 2012 was the last review to provide a detailed assessment of the ODA’s approach to design and construction. The report highlights the following elements of good practice:

- The ODA’s success in providing a combined cooling, heating and power (CCHP) solution and heating infrastructure. This system combines with a similar system developed for the Westfield shopping centre and has the potential to act as a catalyst for efficient energy generation and distribution in the Lower Lea Valley;
- The ODA exceeding expectations in the area of non-potable water. By implementing park-wide non-potable water infrastructure and working with Thames Water to introduce the UK’s first large scale membrane bio-reactor, the Park is able to recycle black water for a wide range of non-drinking uses, including providing the water supply to the district heating system. However, CSL noted that this is an energy-intensive process and that the additional energy burden was a contributory factor to the ODA needing to seek solutions outside of the Olympic Park to meet the carbon target;
- The ODA’s innovative site-wide contracts for a number of key commodities and services. An example of this was for concrete. In 2010 CSL reported that approximately 1.3 million tonnes of ready-mix concrete had been used for the Olympic Park and the Athletes’ Village. By using concrete with a high recycled content and maximising the use of rail to transport raw materials to site, it was estimated that nearly 80,000 tonnes of carbon emissions were avoided, which accounts for a 42% reduction against the UK industry average for concrete.

Concrete was produced on site, using recycled content and with the raw materials being supplied to the site by rail.¹⁶⁵

- The ODA and the Building Research Establishment (BRE) working together to develop a bespoke version of BREEAM to be applied to sport venues and the Park itself. CSL notes that this provides a legacy for future construction of sport venues; and
- The Athletes' Village being the UK's first major housing development to be built to Code for Sustainable Homes Level 4. This objective will need to be finally confirmed by post-occupancy reviews by the legacy owners.

Box 4-5: The Velodrome

CSL identified the Velodrome as the most energy-efficient venue on the Olympic Park, achieving a 31% improvement over 2006 Building Regulations Part L requirements. It was built with 100 per cent legally and sustainably sourced timber. The energy efficiency performance has been achieved by a compact design which optimises natural lighting and minimises the heated volume of air in the main cycling arena, using natural ventilation for passive cooling. 70% reductions in potable water demand were achieved by installing a rainwater harvesting and supply system alongside water efficient fittings and sanitary ware, including waterless urinals. The design team reduced the size and depth of the foundations and developed a lightweight cable net system, saving 1,000 tonnes of steelwork.

4.20 To what extent did the Games involve sustainable procurement practices, and what were the benefits of this?

The sustainable procurement practices adopted in the preparation and staging of the Games are generally regarded to have been effective in encouraging good practice approaches. The importance of the supply chain in delivering against the London 2012 sustainability strategy was recognised early on as a central component. Key features of London 2012's approach included: sourcing materials with low embodied carbon; minimising waste at source; promoting use of secondary materials; and innovative procurement practices on ecologically sensitive materials such as timber and food. Reviews undertaken by the Commission for a Sustainable London 2012 (CSL) provide a key source of evidence on the efficiency of the ODA's and LOCOG's sustainable procurement practices.

The London 2012 Sustainability Plan sets out how London put sustainability at the heart of its bid for the 2012 Games and how it remained central to the vision for 2012. The plan incorporated a programme-wide commitment to sustainability across all venues and Games-related activities and identified procurement as an area that required action that cut across all five of the key sustainability themes that form the basis of the plan. Sustainable procurement practices were expected to generate a range of environmental benefits and the introduction of such practices were also expected to act as levers to encourage wider adoption of good practice within the supply chain thereby generating further legacy benefits. The London 2012 Sustainability Plan emphasises the importance of the supply chain in delivering against its sustainability commitments:

London 2012's commercial partners will play a major role in helping to deliver this sustainability plan. This will be achieved in part through the supply of products and services which improve environmental performance, but also through actively engaging with London 2012 sustainability projects and using their employees, customers and supply chains to promote behavioural change.

¹⁶⁵ Commission for a Sustainable London (2010) *No time to waste: A review of Waste and Resource Management across the London 2012 programme*

The key procurement actions in the London 2012 Sustainability Plan included:

- Sourcing materials with low embodied carbon;
- Minimising waste at source, promoting use of secondary materials;
- Policies on ecologically sensitive materials: e.g. timber, food; and
- Sourcing healthy materials and ensuring health and safety on site.

During 2010, the IOC commissioned an independent review of sustainability arrangements for the London 2012 Games which was very positive concerning the ODA's approach to sustainability procurement. It concluded "*The high level assessment from this review is that London 2012 is on track to deliver exemplary performance on integrating environmental management into construction and sustainability into procurement and sourcing as well as many other areas of operations*".

Reviews undertaken by CSL provide a key source of evidence on the efficiency of the ODA and LOCOG sustainable procurement practices. As noted above, the reviews were generally very positive supporting the IOC's position.

(i) ODA procurement

The ODA's invitation to tender documents included a range of sustainability criteria covering issues, such as carbon, waste, materials, access, employment, equalities and diversity. Tenders were evaluated using a balanced scorecard approach. Sustainability was incorporated in the following ways, depending on the nature of the contract and its sustainability impact:

- Sustainability standards and objectives included in specifications and evaluated for compliance;
- Sustainability impacts evaluated as part of the competitive process; and
- A sustainability section in the balanced scorecard which recognises other features in the suppliers tender.

The main conclusions from CSL's assessment of the ODA's sustainable procurement practices were as follows:

- The processes used by the ODA were largely successful in ensuring that the relevant sustainability issues from the design briefs and the ODA Sustainable Development Strategy were being brought forward into the invitation to tender (ITT) documents and subsequent contracts.
- CSL were pleased to see that where a successful company had submitted a tender that went above and beyond the sustainability requirements set out in the ITT, the sustainability criteria they indicated they will achieve have then been included in the final contract. An example of this is found in the site-wide aggregates contract. Here the supplier offered to deliver 99% of the materials by rail or water (against a requirement of 50%) and 70% recycled content by weight (against a requirement of 25%) and specified where the materials would be sourced from. This information was then put into the contract to ensure that this would be delivered. CSL recognised this as good practice in sustainable procurement and expected this to continue throughout the project life alongside monitoring of delivery of the sustainability objectives.
- The ODA was successful in its approach to forward commitment through working with the construction industry in order to ensure that their requirements could be delivered. They held industry days addressing some of their key requirements and sent clear early signals to the marketplace on their sustainability requirements. This led to sections of the construction industry being ready to respond to the requirements when the ITTs were issued. The aggregates and concrete contracts provide good examples of this, with vendors exceeding the ODA's original sustainability requirements.
 - The venue contracts reviewed by CSL including the Aquatic Centre and Velopark illustrated how the majority of relevant sustainability issues from the design briefs and

the ODA Sustainable Development Strategy were being turned into contractual requirements.

- The London 2012 Sustainability Plan states that “permanent venues will achieve 15% carbon dioxide reductions beyond 2006 Building Regulations and will achieve a BREEAM rating of excellent”. The 15% carbon reduction was observed in contracts viewed by CSL.

Box 4-6: Environment and Sustainability Management System

According to the CSL review of the ODA procurement, where the ODA set clear environmental targets, these were followed through into designs, which were followed through into contracts and implemented on site. The ODA adopted an Environment and Sustainability Management System (ESMS) developed with the ODA Delivery Partner which involved a programme of assurance and site audits. This has been certified to ISO 14001. The ODA ESMS tracked performance against these issues and from investigation during the CSL’s waste review it was clear to CSL that performance on sustainability objectives such as recycled content and recycled aggregate were being tracked down the supply chain to ensure standards were met.

(ii) LOCOG procurement

Key evidence on LOCOG’s approach to procurement is taken from CSL report *Procuring the Games: A Review of LOCOG’s procurement* published in 2010, which primarily focuses on the procurement of goods and services, including bringing partners and licensees on board.

CSL highlighted, as a feature of LOCOG’s approach, the Sustainable Sourcing Code. The first edition was published in November 2008, following 18 months of development and discussion with a wide range of partners. Preliminary versions and interim arrangements were utilised in procurement prior to this.

The Code set out the main sustainability principles to be addressed through procurement which are:

- Responsible sourcing;
- Use of secondary materials;
- Minimising embodied impacts; and
- Healthy materials.

It then set out the approach to sourcing sustainable products based on the following five key questions:

- Where does it come from?
- Who made it?
- What is it made of?
- What is it wrapped in?
- What will happen to it after the Games?

The Code is supported by guidelines on measuring the carbon emissions of products and services and by guidelines on packaging.

CSL reported that the scope of the Sustainable Sourcing Code is comprehensive and represents good practice. CSL reported the following positive attributes of the Code:

- It outlines where suppliers should be meeting compliance with national legislation and also meeting requirements beyond legislative requirements;
- The five simple questions posed by the Code made “a complex document very clear, even for small companies”; and

CSL made a number of recommendations regarding improvements which could be made to the Code, which were addressed in later editions of the Code (i.e. that future iterations of the Sustainable Sourcing Code emphasise that sustainability has the same status as other business requirements and to make clear which requirements were mandatory and incorporate key sustainability issues, including water and air quality, and have a more explicit carbon section).

CSL concluded that LOCOG were effective at encouraging all users of the London 2012 Brand to demonstrate how they would contribute to the London 2012 Sustainability Plan and its relevant objectives.¹⁶⁶ This was done through the procurement and commercial processes and by using sustainability targets with partners such as existing venue operators.

The review also highlighted the good progress the Cultural Olympiad programme had shown and evidence that sponsors and commercial partners were making increasing contributions to the sustainability agenda. Examples of this were support for the food vision and sustainable sourcing code and Cultural Olympiad events addressing provision of low emissions vehicles.¹⁶⁷

4.21 To what extent did the staging of the Games embody principles of sustainability, and what were the benefits of this?

The London 2012 bid envisioned the Games as the “*most sustainable Games ever*”, setting new benchmarks for the staging of large-scale sporting events. The available evidence indicates that almost all the commitments in the London 2012 Sustainability Plan with respect to the staging of the Games were achieved or exceeded. LOCOG’s approach to sustainable events management is widely considered to have helped establish new best practice standards for the events industry. As detailed above in section 4.18, the reviews completed by the Commission for a Sustainable London 2012 (CSL) provided a key source of evidence. Additional data is provided through LOCOG’s own compliance monitoring, which should act as a reference source for future approaches to sustainable events management and which provides complementary data to support the CSL conclusions.

Drawing mainly on the CSL analysis, the table below sets out the key targets from the London 2012 Sustainability Plan and provides an assessment of whether or not they were met.

Figure 4-16: Sustainability achievements against targets – staging the Games

Theme	Targets	Was target met?
Energy	20% reduction in carbon emissions to be met through reducing Games-time energy use	Yes*
Waste	Zero waste from the 77-day Games period to go to landfill	Yes
	Ensure at least 70% is reused, recycled or composted	No – 62% achieved
Logistics	100% of LOCOG Logistics managed goods to be delivered to Games venues by more sustainable modes or methods such as water, non-idling policy, night time deliveries, telematics and electric vehicles.	Yes*
Environmentally-	LOGOG aimed to use 100% FSC ¹⁶⁸ certified timber and timber products.	Yes

¹⁶⁶ Commission for a Sustainable London (2012) *Pre-Games Review: Breaking the Tape*

¹⁶⁷ *Ibid*

¹⁶⁸ Forest Stewardship Council (FSC) promotes environmentally appropriate, socially beneficial, and economically viable management of the world’s forests.

Theme	Targets	Was target met?
sensitive materials	Not use HFCs ¹⁶⁹ where better alternatives were available	No
Transport and Accessibility	100% of spectators to attend the Games using Public Transport (except where they hold a blue badge parking permit).	Yes*

Source: *Commission for a Sustainable London Reviews*

Note: * indicates that CSL were confident targets will be achieved but could not verify with hard data

CSL were confident that LOCOG would very likely exceed its energy target of a 20% reduction in carbon emissions to be met through reducing Games-time energy use as confirmed by LOCOG's own analysis. Approximately 15% of the savings were achieved through design and technical solutions, leaving only 5% to be saved in operations.¹⁷⁰ However, CSL reported that more ambitious targets could have been set if the energy plan had been developed earlier. For example, CSL observed visible wastage of energy at 80% of the venues it visited. CSL had been critical of LOCOG's approach to energy conservation in earlier reviews. In its post-Games report, CSL maintained that LOCOG was very late in developing an energy conservation plan and in recruiting people with responsibility for this during the Games.¹⁷¹ However, CSL considered that more could have been done had planning started earlier and staff had had the opportunity to build relationships with venue teams and influence their plans.

LOCOG reported that the initial figure for reuse, recycling and composting amounted to 82%, significantly exceeding the 70% target.¹⁷² LOCOG were able to dig deeper into these figures as they had exclusive use of SITA UK's Materials Recovery Facility (MRF) in Barking for 78 days from 1 July 2012 and a contractual requirement to track all waste to its end processes, which as LOCOG noted, many businesses in the UK do not do. 93% of all waste collected from London 2012 venues was taken to this site. LOCOG's tracking showed the true reuse, recycling and composting rate was 62%.

CSL were confident that LOCOG would meet its logistics related targets. Insufficient data meant that CSL focused on findings from observations and interviews. For example, CSL observed evidence of freight telematics system in use, and biodiesel trucks as well two types of electric vehicle used on the Park. CSL were told of the ways in which LOCOG planned freight journeys from factory gate to ultimate end-user, avoiding unnecessary handling in warehouses, or double freighting (i.e. from a venue back to a warehouse and then from a warehouse to the end point). CSL concluded that the London 2012 logistics experience appears to have been very comprehensive and is likely to have resulted in significant savings in avoided waste, carbon emissions, materials, as well as providing a series of benefits to the wider industry. Further detail was provided in the LOCOG Pre-Games Sustainability Report which reported that the majority of the fleet would be Euro 5 emissions standard. In addition, LOCOG reported that the logistics contractor had invested in five electric vehicles and 10 biomethane tractor units. Telematics would be used in 133 vehicles to ensure fuel efficient routes.

LOGOG aimed to use 100% Forest Stewardship Council (FSC) certified timber and timber products, not use HFCs where better alternatives were available, and work with the hire-market to try and adhere to the PVC policy that London 2012 had in place. CSL observed that the LOCOG logistics team were tracking FSC documentation and certification for all timber products procured through its processes, including all furniture, fixtures and equipment (FFE). The only circumstances where the logistics team had not been able to track documentation were where there had been last minute purchases by individual functional areas and products were sourced quickly from within the UK. This was expected to be less than 10% of the total FFE procured.

¹⁶⁹ HFC, short for hydro-fluorocarbon, is a family of liquids commonly found in refrigerators.

¹⁷⁰ Commission for a Sustainable London (2012) *Post-Games Report: London 2012 – From vision to reality*

¹⁷¹ *Ibid*

¹⁷² London Organising Committee of the Olympic and Paralympic Games (2012) *London 2012 Post Games Sustainability Report: A Legacy of Change*

CSL concluded that LOCOG were unlikely to have met their target on use of HFCs. CSL were unable to verify that there was any active tracking or on-site assurance processes for HFC use in catering fridges and cold stores, other than Coca Cola ensuring that all its equipment was HFC-free. CSL attributed this to the lack of capacity in the non-HFC refrigerant hire-market.

Box 4-7: LOCOG's Sustainability Management System

A good practice aspect of LOCOG's approach to ensuring the Games was staged in a sustainable way was its Sustainability Management System (SMS) which evolved as the organisation matured and increased in size. The system was ultimately independently certified to the new British Standard BS 8901:2009 – specification for a sustainability management system for events – which had been inspired by the Games and upgraded to its international successor (BS ISO 20121:2012) as soon as it was published in June 2012. This new standard was designed to *"support the organisers of events of all types – sporting, business, cultural, political – in integrating sustainability with their activities"*. LOCOG was the first Games Organising Committee and the first major event organiser to be certified to both these standards. This was highlighted by CSL as a significant achievement for an Olympic and Paralympic Games, with London's Games being the first to achieve certification to a standard of this nature. CSL noted that the application of BS 8901 formed the cornerstone of LOCOG's approach to managing sustainability within the organisation and has brought in another level of sustainability auditing, with an accredited body auditing LOCOG to certify that they meet the standard.

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4.22 To what extent did this influence and benefit the wider construction sector, public and private sector procurement, and the staging of events more generally?

There is clear evidence that the ODA's Olympic Park construction project set new benchmarks in the context of large-scale infrastructure projects. Stakeholders reported some specific examples of large-scale infrastructure projects and strategic infrastructure authorities taking on board the key features of the ODA's strategy and procurement approach on sustainability. These include Crossrail, High Speed 2 and key transport agencies, such as Network Rail and the Highways Agency. There is also clear evidence that lessons from the Games are being taken up in the events industry. The evidence points to the Games providing particular benefits for the events industry in terms of approaches to waste resource planning and sustainability management systems. It is worth noting that stakeholders generally believed that it is too early to provide a systematic analysis of how far good practice is being taken up across industry and that the challenge and opportunity now is to secure the wider adoption of this good practice.

The scale of the Olympic Park development and profile of the Games created significant potential for learning and good practice in the area of sustainability. The planning, design, construction, procurement and staging of the Games all had the potential to contribute to the creation of sustainability learning that could benefit wider industry and government practices. As set out in sections 4.19 and 4.21, the London 2012 Sustainability Plan set out how LOCOG and the ODA could contribute to a range of sustainable development objectives for the Games. These included objectives relating to carbon emissions, efficient water use, waste reduction and sourcing of materials. It was anticipated that the profile of the 2012 Games, both domestically and internationally, would help to generate interest in the dissemination of good practice across industry.

In answering this question, two key sources of research evidence are drawn on. The Commission for a Sustainable London 2012 (CSL) completed research which aimed to understand what evidence there is of a "London 2012 impact" on more sustainable practices in the sectors that the Games was expected to influence.¹⁷³ To do this, CSL conducted desk based research into various sectors and collected feedback from its Commissioners and wider. In

¹⁷³ Commission for a Sustainable London (2012) *In Sight of the Finishing Line, A Review of the Preparations to Stage a Sustainable Games*

¹⁷⁴ Commission for a Sustainable London (2013) *Making a Difference – Post-Games Report*

addition, additional primary research has been undertaken for the meta-evaluation to explore the influence of the Games on the development of sustainability practice. The meta-evaluation research was designed to complement the CSL research by examining, through stakeholder consultations, the specific influence of the Games on the development of good practice, the effectiveness of learning legacy dissemination approaches and to provide more specific and detailed case studies of the influence of London 2012 on good practice take up across industry.

(i) Construction

There is a particular challenge in identifying the direction of causation between the Olympic Park's sustainability approach and development of industry-wide good practice in construction. The ODA worked in partnership with key industry bodies to establish sustainability targets and it was evident that the Olympic Park's strategy was influenced by major infrastructure projects that pre-dated the Park, such as Heathrow Airport's Terminal 5. However, interviews with stakeholders have identified specific elements of good practice which set new standards for a project of this scale. Stakeholders also highlighted the significant potential for learning that the profile of the Games provided and the available evidence reveals a range of examples of organisations integrating learning from the Games into their business practices. As indicated in section 4.19, there is clear evidence that the ODA's Olympic Park construction project set new benchmarks in the context of large-scale infrastructure projects. The Velodrome is recognised as by far the 'greenest' building on the site and stakeholders believed the design approach, particularly the cable net roof and extensive use of sustainable timber, has significant potential to inspire more sustainable solutions in comparable developments.

Despite the intellectual capital generated by the ODA's learning legacy materials on construction, some stakeholders believe that an opportunity may have been missed in terms of using the pull of the Games to maximise learning and sharing of information. Stakeholders were of the view that the Government could have perhaps played a stronger role in dissemination, taking advantage of the unique opportunity that the profile of the Games brought to promote and showcase good practice. The UK Green Building Council Masterclasses learning series which took place in 2012 are recognised as an exception to this. A high proportion of delegates who attended the UK-GBC Masterclasses reported that knowledge and skills learnt at the classes will be useful for their jobs which provides an initial measure of potential take-up of lessons learned. In addition the Government and industry supported Green Construction Board has promoted case studies from the Games to illustrate the benefits of the approaches taken, including at Ecobuild in March 2013, as has the Government supported Green Infrastructure Partnership, and Defra is to publish a Sustainable Procurement Guide for Construction Projects based on the learning from the Games. Box 4-7 below provides details on one of the masterclasses. UK-GBC are planning to hold a one year on event looking at how industry has taken lessons learned from working on the London 2012 project and integrated these into their business or from attending the UK-GBC learning events.

Box 4-8: UK Green Building Council Materials Masterclass

UK-GBC held a Materials Masterclass in June 2012. The masterclass was attended by 40 delegates.

This masterclass focused on the detailed technical lessons learned from the London 2012 Olympic Park strategy on materials. Presentations looked at how the selection of materials for the construction of the Olympic Park made a significant contribution to meeting the Olympic Delivery Authority's (ODA) ambitious sustainability targets. Delegates also gained an understanding of procurement and delivery of responsibly sourced and sustainable materials and learned how to encourage innovation from the supply chain.

The masterclass allowed learners to have an understanding of applying materials targets to a large scale construction project. One of the presentations focused on delivering sustainable concrete. This included understanding the procurement and delivery of sustainable concrete, mitigating risks associated with integrating sustainable concrete and evaluating options and making informed decisions around specifying sustainable concrete. Another focused on delivering 100% sustainable timber on a construction project, also covering procurement, successful delivery and mitigating risks. The presentations demonstrated how the ODA's performance compared against industry averages. For example, the concrete presentation highlighted that less than 6% of materials for concrete mixing were transported by road for the Olympic Park, compared to an average of 91% across industry.

87% of those who completed feedback forms agreed that "the knowledge and skills I learnt will be useful for my job".

As noted, stakeholders reported some specific examples of large-scale infrastructure projects and transport authorities who have taken on board the key features of the ODA's strategy and procurement approach on sustainability. The following examples were highlighted:

- Crossrail: Although it pre-dated initiation of the Olympic Park project, Crossrail has learnt from the ODA on particular aspects of sustainability management and planning. For example, clear targets have been set for sustainability.
- HS2: High Speed 2: This major rail project is learning from the Games in terms of the early planning and setting of sustainability targets.

CSL found little evidence of comprehensive construction sustainability objectives matching those of the ODA from the Olympic and Paralympic Games in Rio or Sochi or the Commonwealth Games in Glasgow or the Gold Coast, Australia. The Commonwealth Games in Glasgow are specifying BREEAM Excellent ratings for buildings but have not specified outcomes in the way the ODA did. However, CSL identified positive developments on other major construction projects that have built on the Olympic Park's sustainability benchmarks. Examples cited include Skanska's new head office in Sweden, Hollywood House, Woking, PwC's office in London, the London School of Economics and Brent Civic Centre. CSL notes that all of these buildings were specified to BREEAM Outstanding or LEED Platinum. While evidence is limited on the precise role of the Olympic Park in influencing these projects, stakeholders have indicated that key contractors who worked on the Olympic Park are in strong demand and are taking lessons forward through their work on other major construction projects.

CSL evidence indicates that the ODA helped to inspire a step change in performance in diverting waste from landfill. For example, most TfL projects, Crossrail and other building projects regularly specify 90- 95% diversion from landfill. Major contractors such as Skanska, Balfour Beatty, Willmott Dixon, Sir Robert MacAlpine, Lend Lease and others regularly report their overall waste performance and regularly exceed 90%.

(ii) Events

There is clear evidence that lessons from the Games are being taken up in the events industry. Areas in which the Games have provided particular benefits for the event industry include the approaches to waste resource planning and the sustainability management system.

Stakeholders believe that many of the waste management elements used in the staging of London 2012 have significant potential to be taken up by industry and to improve the sustainability performance of the events industry. Resource planning and the use of packaging and recycling on site were highlighted as particular aspects where there is scope for lessons to be learned. A range of case studies on use of the Resource Management Plan (RMP) tool for waste management at events demonstrate the significant potential for learning across the events industry. One example is provided in Box 4-8 below. There was also a consensus amongst stakeholders that the Games has helped to deliver a cultural change within the events industry around waste segregation and the use of multiple bins to collect different materials.

Box 4-9: Use of the RMP Tool: Farnborough Airshow 2012

The Farnborough Airshow used the Events Resource Management Plan Tool to help divert waste from landfill and reduce the amount of waste generated. In 2012, the Airshow diverted 81% of its waste from landfill and reduced its overall waste arisings by 26% (365 tonnes) from the 2010 event. This was achieved through waste reduction measures and by increasing recycling, meaning less waste went to landfill or refuse-derived fuel (RDF). The largest waste stream was wood from the build and set up – all 370 tonnes were recycled. The tool provided a forum for the Airshow team to engage with suppliers and identify and share current supplier actions to minimise waste. The team was able to generate a bigger picture of waste generated on site and to see what happened to it, including waste that left the site with suppliers. It provided a good estimate of the total percentage that was recycled or recovered, creating a benchmark for future targets to be set to improve recycling or re-use.

Source: WRAP website

LOCOG's Sustainability Management System (SMS) is widely regarded as a key innovative aspect of LOCOG's approach to sustainability. LOCOG's system was independently certified to the new British Standard BS 8901:2009 – 'specification for a sustainability management system for events', which was upgraded to an international standard (ISO 20121) in June 2012. There is clear evidence that the BSO standard was developed as a direct consequence of London winning the bid to host the Games and that it has major potential to improve the sustainability approaches of businesses in the events industry. Although no specific data on take-up of the BS and ISO sustainable management standards is available, stakeholder views and case study evidence suggest that BS8901/ISO20121 has been widely adopted by event venues and venue contractors. An example is provided in Box 4-9 below.

Box 4-10: ExCeL London Centre

In December 2012 ExCeL London gained certification for ISO20121. A representative of ExCeL who was interviewed for the meta-evaluation research said that this was inspired by the Games. Prior to ExCeL's involvement as London 2012 venue, the Centre was already implementing many of the sustainable processes used in the Games (e.g. waste, energy use). However, the standard brought together structures and processes under one umbrella and is helping the Centre to engage more effectively with suppliers on targets for sustainable practices. It is thought that the adoption of ISO20121 will contribute greatly to the development of sustainable practice in the future.

5 Promoting Community Engagement & Participation

5.1 Introduction

The aim of the Community Engagement and Participation theme of the Games legacy is to promote engagement and participation in community-based activity, including voluntary work. DCMS¹⁷⁵ set out the challenge as being to help reconnect communities, encourage a new culture of volunteering and to spread the benefits of the Games across the whole of the UK. There is also an opportunity to create new opportunities for disabled people and to make the most of the potential of the Games to drive social change. Ultimately, an increase in engagement and activity would be expected to lead to more active and cohesive communities.

For the purposes of analysis, this legacy theme has been divided into five sub-themes:

- **Volunteering and social action:** encouraging and enabling people to play a more active part in society is a key objective of this legacy strand, 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.
- **Participation in 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 through an extensive programme of arts and cultural activity.
- **Engaging children and young people:** the Games and their values were used as a means to inspire and enhance the education of children and young people, and to promote social inclusion by providing opportunities for those from disadvantaged backgrounds.
- **Encouraging sustainable living:** the sustainability commitments made in the bid included efforts to inspire people to live more sustainably, for example by being more energy efficient, choosing more sustainable modes of travel and increasing the amount of waste recycled.
- **Influencing attitudes towards disabled people:** the Games provided an opportunity to influence attitudes towards and perceptions of disabled people.

This chapter provides an assessment of the available evidence relevant to each of the research questions for the sub-themes outlined above.

Volunteering and social action

5.2 To what extent and how have the 2012 Games resulted in more active, cohesive and successful communities, including through inspiring more organisations to offer volunteering opportunities and building the capacity of the sector?

The Games and related activity prompted a significant increase in the supply of volunteering opportunities, particularly during Games-time. Evidence related to the supply of volunteering opportunities is drawn from the available monitoring data for key interventions, supplemented by the views of stakeholders.

A number of volunteering programmes were created to support the running of the Games, most notably Games Makers which offered places for 70,000 volunteers. A further 8,000 volunteering places were created by the Team London Ambassadors programme and thousands

¹⁷⁵ Department for Culture, Media & Sport (March 2012) *Beyond 2012 – the London 2012 Legacy Story*

more opportunities resulted from the regional and local (including host city programmes) volunteering schemes set up around the country and the need for volunteers to help to deliver associated activity such as the Pre-Games Training Camps and the Torch Relays. In addition, many projects inspired by the Games, ranging from Spots v Stripes to the numerous local level Inspire Mark projects, provided a significant number of volunteer opportunities.

Given their link to the Games, these opportunities were largely temporary in nature; however, there is evidence that some schemes, notably Team London Ambassadors, are continuing to provide opportunities going forward by considering how volunteers can be mobilised at other venues and events. For example, since the Games, the Greater London Authority has undertaken pilot activity to provide visitor welcome services in key locations (e.g. St Pancras International) and support to other events (e.g. New Year's Eve celebrations), giving volunteers opportunities to further use and enhance the skills they developed in their Games-time volunteering roles.

Work is underway to build upon the foundations which have been laid by the Games. While it is too early to assess the extent to which programmes set up to support the Games are able to evolve and sustain opportunities for volunteers in the future, there is considered to be an opportunity for forthcoming major events, such as Glasgow 2014 and the Rugby World Cup, to benefit from the work which has been done. It is acknowledged that the increased interest in volunteering is positive and provides an opportunity for the sector, although stakeholders noted the difficulties likely to be faced by organisations looking to continue volunteer programmes or create new opportunities going forward given the resources required to sustain volunteer involvement and development, and ensure that opportunities provided are high quality.

The Join In initiative represents an attempt to support community organisations to offer more volunteering opportunities and identify potential candidates, thereby helping to build capacity in the sector. Initial activity in August 2012 focused on local sports clubs and resulted in over 6,000 events taking place across the country which helped clubs to increase their profile within the local community and find new people willing to help out. Join In is planning a more extensive programme of activity throughout summer 2013, with a broader focus involving working with community groups to encourage them to consider what skills volunteers can bring and how to reach out to a wider circle of people beyond existing members and users. Planned evaluation will help to demonstrate the extent to which community groups identify new volunteer opportunities and successfully recruit into these posts as a result of the support provided by Join In.

The only action specifically targeted at building the capacity of volunteering organisations and infrastructure prior to the Games was the Inspiration and Legacy project delivered by Youthnet and Volunteering England. This project reached over 800 organisations through a programme of Games-inspired workshops across the country and the relevant pages on Volunteering England's website received almost 15,000 unique hits. However, this activity came to an end in 2011 and, aside from Join In, stakeholders felt that there had been a missed opportunity to build the capacity of the sector to benefit from the enthusiasm surrounding the Games. In general, stakeholders felt that there is still some work to be done to ensure that there is an adequate supply of good quality opportunities for those who wish to volunteer their time in their local communities.

A key benefit of the Games is the increase in the profile of volunteering which was generated, particularly as a result of the positive media coverage and recognition given to Games Makers. The Games also helped to change the perception of volunteers, challenging traditional stereotypes and improving the image of volunteering. The challenge going forward is for the sector to build on this positive coverage and use it to frame thinking about volunteer roles, recruitment and development. Stakeholder consultation has revealed some evidence that the Games encouraged some organisations to think differently about volunteers and their role within an organisation which may, in time, encourage wider change in the sector and help to support an increase in participation which would be expected to contribute towards the creation of more active and cohesive communities.

5.3 To what extent and how have the 2012 Games resulted in more active, cohesive and successful communities, including through inspiring more people (and especially young people and disabled people) to volunteer their time, and tackling the barriers to participation?

The Games provided an opportunity to mobilise many thousands of volunteers. Evidence of the extent to which the Games inspired more people to volunteer their time is provided by a number of surveys of those who took part in programmes which offered volunteering opportunities, including evidence from volunteers themselves as to their motivations and future intentions. This is supplemented by evidence of the influence of the Games on volunteering behaviour from the Taking Part survey and the views of stakeholders.

The creation of volunteer opportunities surrounding the Games was met with an enthusiastic response from the general public with all programmes being able to recruit to fill the posts which had been created. In some cases there is evidence that demand far exceeded supply, for example the Games Maker programme received 240,000 applications for the 70,000 available posts.

In addition to providing direct support to the Games, people also volunteered their time to support related activity, for example, over 4,500 volunteers were recruited to help organise and run community events across the country through the Spots v Stripes programme. A survey of a sample of 290 Inspire Mark projects estimated that the number of volunteers involved in these projects alone exceeded 100,000.

The Games appear to have inspired a full cross-section of the population to volunteer, as indicated by the demographic data for the Games Maker programme. A broad range of people, in terms of age, ethnicity and place of residence, were recruited to undertake the role of Games Maker, although the programme was most popular with younger and older age groups (which is consistent with the pattern of volunteering in the general population and reflects the increased leisure time generally available to students and the retired population). Games Makers were recruited from across the UK, with London (34%) and the South East (21%) together, perhaps unsurprisingly, accounting for over half of participants.

A survey of Games Makers highlighted that the key motivating factors for volunteers related to the Games itself, that it provided an opportunity to be part of a once in a lifetime event.¹⁷⁶ The research also suggested that the majority of Games Makers were existing volunteers, although 20% of respondents had not volunteered before which shows that the Games had an inspiring effect on a significant number of people..

Importantly, almost half of respondents reported that they intended to increase their level of volunteering after the Games (compared to the level they had undertaken in the period 12 months prior to the Games); however, the authors note that the timing of the survey immediately after the Games perhaps meant that some volunteers were still riding a wave of enthusiasm given the high levels of satisfaction with the experience and the positive media coverage. The real test of the inspirational effect of the Games will be whether these intentions are followed through and further research will be required to establish this.

Similar findings to that of Games Maker emerged from a survey of Team London Ambassadors, which found that just under one-quarter of respondents were new to volunteering (24%) and the most popular motivating factor was the chance to be part of the Games/chance of a lifetime. The reported figures for skills development benefits were also similar to those revealed by Games Makers. In addition, 16% of Ambassadors responding to the survey said that their experience had enhanced the ways in which they carried out their job or it had helped them access employment, training or an apprenticeship.¹⁷⁷

A high proportion of the Ambassadors responding to the survey (87%) reported that they were likely to volunteer again in the next 12 months (although the survey did not establish whether

¹⁷⁶ Tracy J Dickson and Angela M Benson (2013) *London 2012 Games Makers: Towards Redefining Legacy*

¹⁷⁷ GLA Intelligence Unit (forthcoming) *Team London Ambassadors Research Summary*

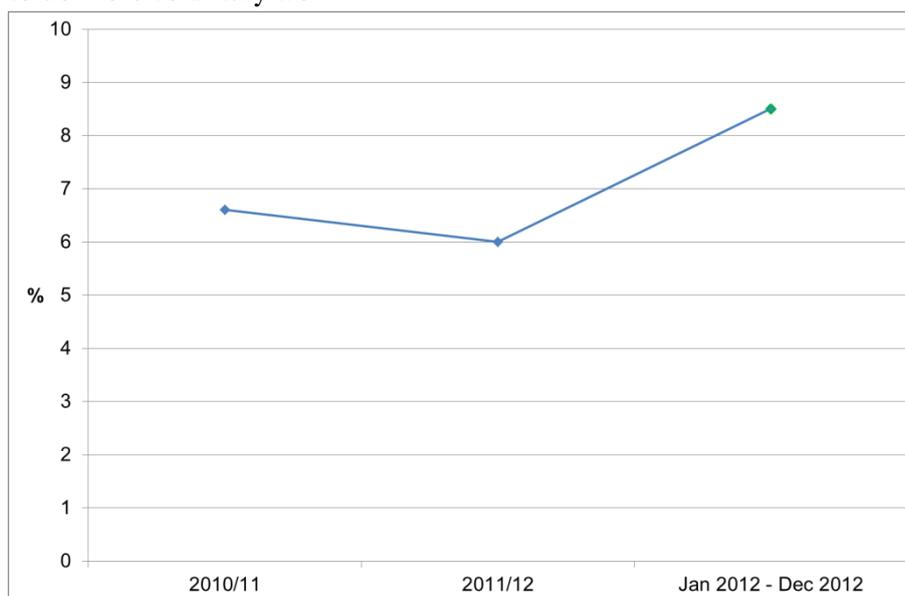
respondents intended to volunteer more in the coming year compared to the year prior to the Games). The majority (84%) of Ambassadors said that their experience had made them more likely to volunteer at other events, while 77% reported that they were more likely to volunteer for other activities.

Of the 2,713 projects which successfully applied for the Inspire Mark, 178 specifically categorised themselves as volunteering projects, although in practice, a much higher proportion of projects encouraged and promoted volunteering. A sample survey of Inspire Mark project leads revealed that the projects had positive effects on participants' involvement in their communities (83% of those surveyed agreed that this was the case) and encouraged volunteering (77% of those surveyed agreed that this was the case).¹⁷⁸

Over 4,500 volunteers took part in Spots v Stripes and evaluation of this programme revealed that benefits to long-term volunteers included increased self-confidence and self-esteem, progression into a new job or education/training and a feeling of belonging to the local area. Benefits to volunteers were found to have been sustained over time and led to a number of people taking up volunteering afterwards.¹⁷⁹

The Taking Part survey showed that participation in volunteering amongst the general population over the past 12 months increased by over two percentage points in 2012 to 25.5% (compared to 23.3% in 2011/12). Furthermore, 8.5% of those who had volunteered in 2012 reported that the Games had motivated them to do more, which represented a significant increase in the level of influence compared to the previous two years in which the question had been asked (Figure 5-1).

Figure 5-1: Percentage of volunteers that agreed they were motivated by 2012 Olympics to do more voluntary work



Source: *Taking Part*

Breaking down the data from 2012 highlights that those volunteers aged between 65 and 74 and those aged 75 and over were both significantly less likely to be motivated by the UK's hosting of the Games to do more voluntary work (4.4% and 3.7%, respectively, compared to an overall figure of 8.5%), while those from a black or ethnic minority group were significantly more likely to be influenced (23.3%). The influence of the Games peaked in the final quarter of 2012 (October to December) at 12.7%, which suggests a high enthusiasm for volunteering immediately post-Games, perhaps influenced by the extensive positive media coverage of Games-time volunteers.

¹⁷⁸ Nielsen (2012) *Survey of Inspire Project Leads (datafile)*

¹⁷⁹ Ecorys and Sheffield Hallam University (2013) *Final Social Impact Evaluation of the Cadbury Spots v Stripes Community Programme*

Despite the popularity of Games-related volunteering, stakeholders recognised that due to the scale and profile of the Games, the role of a Games Maker (and that of other volunteers who supported the Games) was significantly different to the typical community-level volunteer role and, as a result, it was unclear how much that the additional volunteer efforts which had been mobilised by the Games would subsequently translate into increased interest and involvement in volunteering at the local level. There is a challenge for the sector in sustaining the interest of Games volunteers given the high profile and unique nature of the Games, although it is expected that other forthcoming major events will benefit from strong demand for volunteer roles.

It will be important to monitor participation in volunteering post-2012 to determine whether the increased interest in volunteering generated by the Games is sustained and built upon (particularly for young people and disabled people), helping to create more active communities, and also to assess the impact of any change in volunteering on indicators of community cohesion. The data for 2012 mirrors the expectations of stakeholders of a small increase in participation in 2012, rather than a major shift, and it is not yet clear whether this will be sustained in future years. It should be noted that one limitation of the Taking Part survey is that it captures data on the presence or absence of volunteering amongst respondents in the last 12 month period, but does not collect further data on the frequency of participation so is unable to highlight changes in the *amount* of volunteering being undertaken.

There is clear evidence of the benefits experienced by those who participated in Games-related volunteering schemes, including skills development which was considered relevant to both volunteering and paid employment roles.¹⁸⁰ However, there is no evidence of the views of those who did not participate in Games volunteer programmes, which would be valuable in establishing whether they faced barriers to participation and whether any barriers could have been more effectively addressed.

5.4 To what extent and how have the 2012 Games resulted in more active, cohesive and successful communities, including through inspiring people to set up their own 2012 Games-related activities, which engage people across the UK in the Games?

There are many examples of Games-related projects which provided opportunities for community involvement and engagement, including the vast majority of Inspire Mark projects and Cultural Olympiad events which provided opportunities for communities to come together and celebrate the Games. For example, the Legacy Trust UK funded projects Lakes Alive, which saw a programme of arts and performance events taking place across Cumbria, and the Create festival in East London which aims to build links between creative organisations based in the area and the local community.

Another opportunity for communities across the country to get involved in the Games was provided by the Torch Relays. As part of the Olympic Torch Relay, 8,000 inspirational people were nominated to act as Torchbearers and carried the flame through more than 1,000 cities, towns and villages. An estimated 15 million people came out to see the Olympic Flame as it travelled across the country, helping to bring together and inspire communities, and an estimated 223,000 people gathered along the route and attended events associated with the Paralympic Torch Relay. In September 2012, Nielsen undertook the LOCOG State of the Nation Survey which found that of those who attended the Olympic Torch Relay or evening celebration, 38% strongly agreed and 44.5% agreed that the relay helped to create a sense of community spirit which highlights an important benefit of activity which brings communities together.

The vast majority of community activity associated with the Games was additional (i.e. would not have taken place if London had not been chosen to host the Games). For example, a survey of Inspire Mark project leads revealed that the majority felt their project would either not have taken place (39% reported that it would definitely or probably not have taken place) or would have been changed in some way (33% reported that it would not have taken place with the

¹⁸⁰ Tracy J Dickson and Angela M Benson (2013) *London 2012 Games Makers: Towards Redefining Legacy*

same scale or profile) if the Games had not taken place. This highlights the important role that the Games played as a driver of activity and opportunities to bring people together, which extended to activity at the venues (including Live Sites) and associated broadcast/ media coverage. The Taking Part survey results for 2012 show that 69% of people were supportive of the UK hosting the Games (an increase from almost 63% in 2011/12) and a number of stakeholders mentioned the positive impact the Games appears to have had on pride in the UK and its achievements.

It is also important to note the work which was done to engage people across the UK through the efforts of other national programmes such as Get Set and sponsor-led initiatives such as Spots v Stripes. Evaluation of Spots v Stripes found that events had brought together groups of people who would not normally mix, including different ethnic groups, disabled and non-disabled people, and older and younger people playing together.

The Nations and Regions Group worked to ensure that social benefits were delivered across the UK. Figure 5-2 shows that Inspire Marks were awarded in every nation and region, allowing communities up and down the country to get involved in activities inspired by the Games. In addition, there was interest in Games-related volunteering roles from all parts of the UK and people putting themselves forward as Local Leaders.¹⁸¹

Figure 5-2: Engagement in volunteering and social action in the nations and regions

	Inspire Marks awarded	Expressions of interest in volunteering	Local Leaders signed up
East of England	225	41,497	1,387
East Midlands	263	15,134	755
North East	193	4,301	379
North West	335	13,988	926
Northern Ireland	77	2,086	127
Scotland	90	4,821	509
South East	264	70,000	2,510
South West	276	21,831	969
Wales	103	5,230	409
West Midlands	232	15,723	796
Yorkshire and Humber	184	9,014	656

Source: Nations and Regions Group¹⁸²

The success of Games-related activity such as the Torch Relays in attracting large numbers of people at local level shows that the Games were able to successfully engage people across the UK. There is also evidence that the Games inspired a significant number of people to set up their own activities to engage people across the UK in the Games, including Inspire Mark projects and the activity undertaken by Local Leaders.

5.5 To what extent have any impacts been sustained, supporting the development of the Big Society?

Promoting social action is part of the wider vision for the Big Society, which aims to create a climate that empowers local people and communities to take action. The Games-related initiatives to promote volunteering and social action align well with the Big Society vision. At this stage there is a lack of evidence as to the extent to which volunteering and community engagement effects have been sustained. This section draws together some of the evidence on

¹⁸¹ The Local Leaders programme provided tools and resources to help those who had put themselves forward to organise events to celebrate the Games in their local communities.

¹⁸² Nations and Regions Group (2012) *End of Games Report*. Inspire Marks awarded and local leaders = total to end Sept 2012; expressions of interest in volunteering = total to end July 2010 (i.e. before opening of Games Maker application process)

the benefits reported by those who took part in Games-related community activity, details of planned activity to support sustained impacts and stakeholder views.

There are already indications of attempts to sustain some of the community activity inspired by the Games and there is strong interest in further mobilisation of Games volunteers, for example the ongoing work by the Greater London Authority to provide further opportunities for Team London Ambassadors. As noted, a survey of Games Makers showed that 45% planned to increase their level of volunteering compared to pre-Games levels, although further research will be required to demonstrate whether these intentions are realised. Join In activity planned for summer 2013 will provide a good indication of how far enthusiasm for community involvement and volunteering has been sustained and it will also be interesting to note the prevalence and level of interest in any celebrations to mark one year on from the start of the Games and also forthcoming major events (such as Glasgow 2014).

Stakeholders felt that the Games Maker model was an example of good practice which could be replicated for other events, subject to sufficient resources being made available to cover the cost of important aspects such as training and support.

Prior to the Games some funding was provided to develop the infrastructure for volunteering (including engagement with the sector and development of the Do It website). However, it was noted that further support is required to enable the sector to maximise the benefits of the Games.

There is also some evidence that Games-related activity will leave a legacy of benefits in communities and for volunteers. For example, a survey of participants in Inspire Mark events found that around 90% reported at least one positive outcome, with the most common being an increased likelihood of trying new sports, encouraging others to do sport and meeting/making new friends (all reported by almost 60% of respondents). More than 50% also reported an increased likelihood of feeling fitter and healthier, becoming involved in their local community and feeling more self-confident.¹⁸³ Evaluation of Spots v Stripes found evidence of a range of positive outcomes for volunteers and communities which had been sustained beyond the life of the programme. Benefits to long-term volunteers included increased self-confidence and self-esteem, progression into a new job or education/ training and a feeling of belonging to the local area. Those who took part in the games reported feeling a greater part of the community, feeling part of the Olympic spirit and spending more time with family/ friends. It is intended that some of the community events set up or inspired by Spots v Stripes will continue to take place annually and many of the game playing approaches will continue to be used by Groundwork Trusts as a way of engaging communities in the future.

Overall, stakeholders felt that it was too early to tell whether the Games has had a sustained impact on volunteering and social action and, in doing so, make a contribution to the development of the Big Society and the achievement of more cohesive and inclusive communities. As noted, the extent to which Games-related activity is sustained or continued, and the level of interest it secures, will need to be monitored in the coming years in order to make a more certain and robust assessment.

Participation in culture

5.6 To what extent have the 2012 Games resulted in more active, cohesive and successful communities through inspiring more people (and especially young people) to take part in cultural activities, and how?

The Cultural Olympiad was a 4 year cultural celebration, a key aim of which was to enable and encourage large-scale participation in cultural activity by presenting an ambitious and accessible programme of events across a diverse range of art forms in all parts of the UK, with a particular

¹⁸³ Knight, Kavanagh and Page (February 2013) *London 2012 Olympic Games and Paralympic Games Inspire programme legacy survey*

focus on young people. This section presents evidence from evaluations of Cultural Olympiad and Legacy Trust UK activities, alongside findings from the Taking Part survey.

The consensus is that the Cultural Olympiad clearly succeeded in its overarching aim, resulting in an extensive four year programme which totalled an estimated 117,717 events/ activities and created over 43 million public engagement experiences. Broadcasts and online hits are estimated at 204.4 million, further increasing the headline level of engagement.¹⁸⁴ Further evidence from the Legacy Trust UK evaluation and the findings of the survey of Inspire Mark projects leads show that individual cultural projects attracted a significant number of participants/ audience members at events across the UK.^{185,186}

Activity took place in all parts of the UK and provided a means for people across the country to engage with and celebrate the excitement surrounding the Games. There is evidence of particular success across the cultural programme in engaging with young people, including some projects which allowed young people to take a leading role as artists, producers or curators.

There is also some evidence that organisations have been able to use Cultural Olympiad activity as a means to attract new audiences, and the most common response from projects when asked to identify the benefits for participants was engagement in art/ cultural activity for the first time. However, a high proportion of those who engaged in the Cultural Olympiad appear to have been those who already had a high level of cultural engagement with 90% of respondents to an audience survey for a sample of London 2012 Festival events saying that they had attended a similar event previously and 93% noting that they had engaged with culture three or more times in the last 12 months. As a comparison, 64% of the general population engaged with the arts three or more times in the last 12 months in 2012.¹⁸⁷ However, the survey shows that different kinds of events drew different types of audiences with Piccadilly Circus Circus (a pop-up event in a public space) drawing far more people who rarely or never usually engaged with culture whereas the performance of the opera *Mittwoch aus Licht* drew an audience where almost half of respondents said they engaged with arts activity at least once a week. The majority of Legacy Trust UK programmes provided some evidence of having undertaken activities to improve reach and engage new participants, notably a survey of participants in the Games Time events which took place across the East Midlands revealed that 40% had never previously participated in arts activities.

Techniques used by projects to engage with new audiences included designing projects which were ‘not just art,’ making use of different kinds of spaces and making activity free of charge. Some stakeholders noted that the Cultural Olympiad has led to an increase in outdoor events, particularly those held in unusual locations and there is also evidence of extensive use of digital technologies for both dissemination and production.

Evaluation of Legacy Trust UK funded programmes provides extensive evidence of the benefits to individual participants, particularly through personal and practical skills development.

This high level of engagement is also indicative of a positive effect on communities, providing opportunities for people to come together and develop a greater sense of community spirit. The evaluation of Legacy Trust UK notes an increase in civic pride or a greater sense of place was particularly evident in relation to large outdoor events, while smaller community-based events were seen as contributing to increased community spirit. The Trust’s programmes are seen to have contributed to people feeling part of stronger and wider social/ community networks and an increased sense of civic pride. Key factors identified as contributing to this achievement were personal relevance (defined as cultural experiences which provide a link to

¹⁸⁴ Garcia, Dr. Beatriz (2013) *London 2012 Cultural Olympiad Evaluation*. This headline figure is considered to be an underestimate as it does not include Open Weekend activity and Inspire projects which also formed part of the Cultural Olympiad.

¹⁸⁵ Janice Needham et al (2013) *Legacy Trust UK: Evaluation Report*

¹⁸⁶ Nielsen (2012) *Survey of Inspire Project Leads*

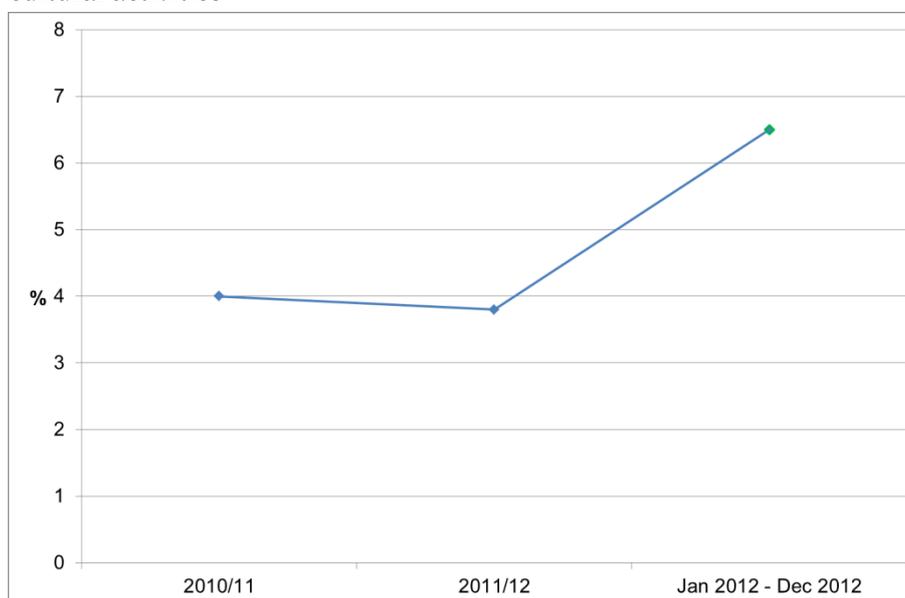
¹⁸⁷ Department for Culture, Media & Sport Taking Part Survey, 2012/13 Q3 Statistical Release

the personal history and interests of the individual), sense of place (cultural activities integrated into people's everyday lives and structures) and trust (cultural activities which are in familiar surroundings and contexts). Surveys undertaken as part of the Cultural Olympiad evaluation also provide evidence of these wider community benefits, including helping to create a sense of place and feelings of pride. However, there is a lack of evidence which explicitly considers the outcomes for children and young people.

Engagement with the arts remained relatively stable over the period 2005/06 to 2010/11, as shown by the Taking Part survey in England, although there was a slight up-turn in 2011/12 which continued during 2012. This is likely to have been facilitated, at least in part, by the increased opportunities to get involved in arts activity as a result of the Cultural Olympiad.

The survey also found that 6.5% of those participating in cultural activities reported they had been motivated by the Games to do more (Figure 5-3). The proportion citing an influence had increased by over two percentage points compared to 2011/12 which suggests the influence of the Games became stronger during the year of the event itself (coinciding with an increase in the intensity of Cultural Olympiad activity).

Figure 5-3: Percentage of population motivated by the 2012 Olympics to do more cultural activities



Source: Taking Part

Breaking down the 2012 data shows that those aged between 16 and 24 were significantly more likely to be motivated by the Games to do more cultural activities (10%) and those aged between 65 and 74, and 75 and over, were significantly less likely to report this effect (4.1% and 2%, respectively). In addition, those from a black or ethnic minority group were significantly more likely to be motivated by the Games to do more (15.8%), although those of a white ethnicity were significantly less likely to be motivated by the Games in this way (5.4%). The overall percentage motivated by the Games to do more cultural activity increased steadily throughout 2012 climbing from 3.7% in quarter 1 to 5.2% in quarter 2, 7.6% in quarter 3 and reaching 9.6% in quarter 4.

For those that actually engaged with Cultural Olympiad events the motivation to attend more was significantly higher with 58% of respondents to the London 2012 Festival audience survey reporting that they would be more likely to attend future cultural events as a result of attending the Festival.

It is clear that cultural activity connected with the Games attracted significant audiences, that during this time arts engagement in the general population has shown an increasing trend and that, for some, the Games motivated increased engagement. However, the evidence is less clear as to whether the Games encouraged new people to take part in cultural activity (as distinct from encouraging those who were already engaged to participate more often).

There is a lack of evidence at this stage to demonstrate whether the reported positive intentions/ motivations are being followed through and whether any positive impact on participation is sustained, although some early indications are provided by the findings of an online survey of London residents undertaken by the Greater London Authority. This survey found that 8% of the sample reported that they are taking part in events and cultural activities more often as a result of the Games which suggests that some of the previously reported intentions to participate in culture more often have already translated into an actual behavioural change for some London residents.¹⁸⁸

5.7 To what extent have the 2012 Games resulted in improved access to and participation in cultural activity amongst disabled people?

One of the aims of the Cultural Olympiad was to showcase the work of deaf and disabled artists and to bring this work to a wider audience. This aspect of the programme is regarded by stakeholders to have been extremely successful, resulting in additional commissions for the artists involved and an enhanced profile for their work. Evaluations of the Cultural Olympiad and Legacy Trust UK also provide evidence of these achievements.

For example, the Unlimited programme was intended to play a major role in challenging perceptions of disability by showcasing the world class talents of the UK disability arts movement, and also expanding even further the opportunities for direct engagement with arts and culture for disabled people. Accentuate, the Legacy Trust UK programme for the South East of England, also promoted the skills and talents of disabled people and worked with organisations in the region to improve access for disabled people. Across the Cultural Olympiad as a whole, an estimated 806 of the participating artists were deaf or disabled.

An audience survey undertaken at eight London 2012 Festival projects found that 8.2% of respondents reported that they had a disability and/ or long-term health condition and, in addition, 5.3% of respondents reported that they had someone in their party with a disability and/ or long-term health condition.¹⁸⁹ Although this cannot be seen as representative of the audience for the Cultural Olympiad as a whole it does suggest that those with a disability attended a range of different types of activities, although it is not known to what extent these respondents would already typically participate in cultural activity. The majority (77%) of respondents rated accessibility for those with disabilities or access issues as seven out of 10 or higher.

Across all Legacy Trust UK programmes, it is estimated that over 75,000 participants were disabled, accounting for 5.5% of all participants; however, for many programmes the percentage of disabled participants was lower (1 or 2%). The evaluation of Legacy Trust UK¹⁹⁰ concludes that where there was a focus on disability this work has been successful in delivering lasting change for disabled people, as well as increasing understanding and awareness of disability issues for non-disabled people. However, counter to this, it appears that unless a specific focus is given to disabled participants or artists, barriers are such that participation remains low.

Taking Part shows that the proportion of disabled people or those with a long-standing illness who engage with the arts is significantly lower than for those who do not have a long-standing illness or disability. However, data shows an increase in engagement by those reporting a long-standing illness or disability in recent years, leading to a narrowing of the participation gap.

An evaluation of the 'Summer Like No Other' programme, which formed part of the London 2012 Festival, revealed that the programme had been designed and delivered in an accessible

¹⁸⁸ GLA Intelligence Unit (forthcoming) *Post Games Online Survey Results*

¹⁸⁹ The definition for disabled people varies between data sources and surveys and thus the measurement of the impact on disabled people varies. When referencing data related to disabled people it thus needs to be noted that this will be specific to the data source and may not be comparable between sources and surveys.

¹⁹⁰ Janice Needham et al (2013) *Legacy Trust UK: Evaluation Report*. This evaluation compiled evidence from programme level evaluations subject to the caveat that where no evidence on a particular outcome was present in the programme level evaluation this did not necessarily indicate that the programme did not have an impact in that area as it could instead mean that this aspect was not covered by the evaluation.

way that enabled deaf and disabled people to take part.¹⁹¹ The evaluation concluded that effective marketing of events to deaf and disabled customers was essential, along with access to parking, clear signage and proper access routes. Part of the programme involved disability awareness training to 60 people within London's cultural organisations and it was hoped this would leave a legacy in terms of maximising accessibility to and participation in future events for disabled people.

5.8 To what extent has Cultural Olympiad activity resulted in wider economic benefits, including through skills development, enterprise support and attracting visitors to London and the UK?

Evaluations of Cultural Olympiad and Legacy Trust UK activities provide evidence that the Cultural Olympiad resulted in a range of wider economic benefits, which are also reflected in stakeholder views.

The Cultural Olympiad provided opportunities for an estimated 40,464 individual artists from both the UK and overseas to be involved in the programme, including 6,160 emerging artists. The Cultural Olympiad also resulted in the creation of 5,370 new works/ commissions which would be expected to generate an important economic benefit for the individuals/ organisations concerned by providing work in the short-term and also increased exposure which could lead to further work in future.

There is evidence that, as well as attracting attendances by local people, some Cultural Olympiad events were attended by those who had travelled significant distances for that specific purpose. Available data suggests that the Cultural Olympiad drew in both domestic and international tourists, with the evaluation reporting estimates of 1.6 million domestic tourist visits and 126,000 international tourist visits across the Cultural Olympiad in the period July to September 2012.¹⁹² Both domestic and international visitors engaging with the Games (including those engaging with the Cultural Olympiad) reported expenditure which was significantly higher than average, suggesting a positive impact for the local economies concerned.¹⁹³

The significant media coverage received by the Cultural Olympiad, both in the UK and overseas, would be expected to contribute to raising awareness of the UK's cultural offer amongst potential visitors and there is an opportunity to build upon this increased profile going forward. This potential is reflected in the Nation Brands Index, a global online survey of perceptions of nations as places to visit, where the UK's ranking for culture rose from 5th to 4th following the Games.¹⁹⁴

In total, individual Legacy Trust UK programmes estimate an economic impact of £58 million, although the Trust's evaluation highlights that varying methodologies were used by individual programmes to arrive at this figure. Many programmes demonstrated a link between cultural activity and tourism and were able to estimate the additional visitor spend attracted to the area by the funded activity. For example, it was estimated that over £10.5 million in additional visitor spend was generated in the North West regional economy, with the Lakes Alive festival proving to be a key driver which motivated a significant number of visits from outside of the region. In addition, the West Midlands Cultural Observatory¹⁹⁵ estimated that across the region's entire Cultural Olympiad programme there was an economic impact on the West

¹⁹¹ Attitude is Everything (2013) *Summer Like No Other Access Evaluation*

¹⁹² Further analysis of the Great Britain Tourism Survey and Great Britain Day Visits Survey shows that over the longer period of January to October 2012 the figure for domestic tourists rises to over 3 million

¹⁹³ See *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base* for further information on tourism aspects

¹⁹⁴ See *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base* for a full discussion of tourism impacts, including the Nation Brands Index survey and its findings

¹⁹⁵ The Observatory provided a source of data and information on the region's cultural sector.

Midlands of £32.8m, including additional attributable spend by audience members of £13.3m.¹⁹⁶

A survey of Cultural Olympiad projects found that over half (52%) of all activity included sessions for education, training or taking part, highlighting a strong commitment to engagement and active participation. A key benefit for those involved which emerged from this survey were opportunities for creative learning. There is a sense that a large proportion of this learning was informal, although it should also be recognised that some projects provided for more formal skills development opportunities, such as the Creative Jobs Programme which provided training opportunities for 40 unemployed young people in cultural organisations within central and East London. Others specifically involved activity to support the development of businesses in the creative industries sector, such as the Creative Innovation business support programme which aimed to grow creative entrepreneurship in the East Midlands. Evaluation of Legacy Trust UK programmes provided evidence that some of those who took part in activity reported benefits in terms of skills development. There was also evidence that involvement helped some individuals to subsequently secure employment or opportunities for further training/studying.¹⁹⁷

Stakeholders agreed that a key benefit of the Cultural Olympiad was the significant increase in partnership working across the sector. It is estimated that almost 11,000 new partnerships were formed through the Cultural Olympiad, encompassing cultural organisations, businesses, education providers, local authorities and sports organisations. It is hoped that new partnerships will continue to develop in the future.

The Games provided a significant opportunity for the cultural sector, which motivated and inspired people to get involved. A key benefit is the increased profile and credibility that has been generated for the UK cultural sector. There are already examples of artists being involved in new projects as a result of their involvement with the Cultural Olympiad, most notably collaborations with projects in Rio as the next summer Games host city and an increased interest in the work of deaf and disabled artists.

5.9 To what extent have any impacts been sustained (including through raising cultural investment and the profile of the arts, building sustainable partnerships, and inspiring future artists and audiences)?

The evaluations of the Cultural Olympiad and Legacy Trust UK programmes provide some indications that activity which formed part of the Cultural Olympiad will be sustained.

There is evidence that a significant proportion of projects which formed part of the Cultural Olympiad will continue their activity in some form. For example, just over half of projects (52%) surveyed as part of the Cultural Olympiad evaluation indicated they expected to continue in a similar form beyond 2012, while 30% suggested that they would continue under certain circumstances, mostly dependent on funding. In addition, the majority of Legacy Trust UK programmes in the nations and regions were able to evidence some continuation of activity in 2013.

Stakeholders reported that plans are in place to continue many of the partnerships and collaborations developed as part of the Cultural Olympiad. Around three-fifths (61%) of those responding to the Cultural Olympiad evaluation project survey reported that they expected partnerships which were formed as part of the Cultural Olympiad to continue. There is also evidence of significant collaboration with projects based in Rio, supporting the cultural programme being developed for the 2016 Games.

¹⁹⁶ West Midlands Cultural Observatory (2012) *Cultural Olympiad in the West Midlands: An evaluation of the impact of the programme (2008-2012)*

¹⁹⁷ For example, the overall aim of the Volunteering into Employment programme run by Team East for Skills in the East of England was to get people nearer to or into employment, volunteering or training and it was reported that 641 participants were engaged in employment, further learning, job searching or volunteering by the time they left the programme.

There is a view that the increased profile of the arts resulting from Games-related activities will generate benefits for artists and the wider cultural sector, although it is too early to tell how long these benefits will be sustained. Two-thirds (67%) of projects surveyed for the Cultural Olympiad evaluation stated they gained greater national profile and felt part of a bigger national celebration as a result of being part of the Cultural Olympiad.

The Legacy Trust UK evaluation provided evidence of some successes in influencing funders and cultural agencies at a strategic level, most notably in the East Midlands. However, the authors noted that it remains to be seen whether the experience of the programme results in a change in funding policy and practice by other local authorities or Arts Council England.

There is no evidence at present of the effect of the Games in inspiring future artists and audiences. It would be helpful to monitor this over the coming years, in particular to look at whether the Cultural Olympiad has influenced the scale and nature of arts engagement and the work of artists in the future, along with investment in and funding for the arts.

Engaging children and young people

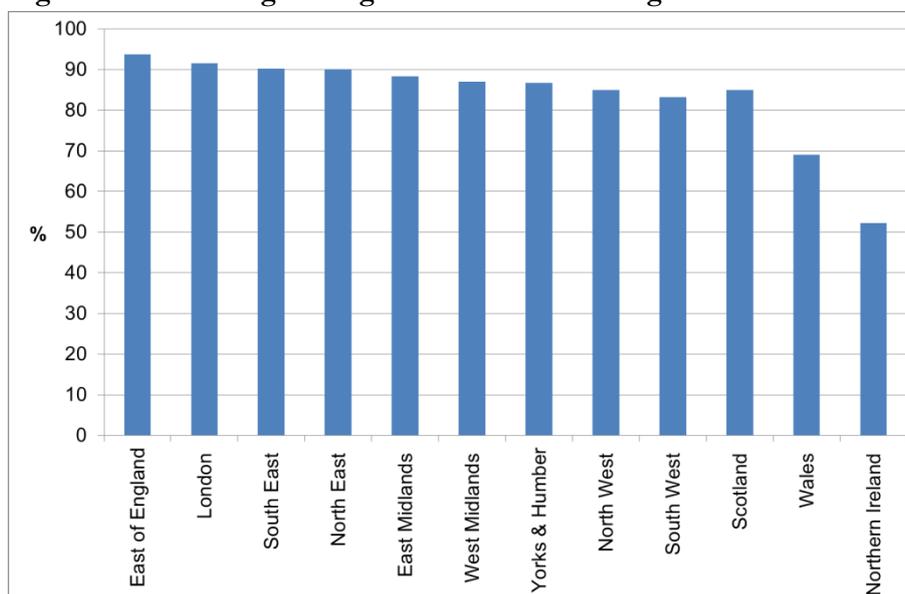
5.10 To what extent, and in what ways, have the 2012 Games positively affected the aspirations and pride of children and young people, including through educational activity to promote Olympic and Paralympic values?

Evaluation evidence demonstrates that educational activity such as Get Set has been used successfully as a means to increase engagement and involvement in the Games amongst young people across the UK and that this has resulted in positive outcomes.

Get Set achieved a high penetration of eligible schools and provided a range of tools and materials which could be used flexibly across a number of curriculum areas. Monitoring data showed that:

- Almost 26,500 educational establishments registered to be part of Get Set, representing 85% of the total number of those eligible to take part;
- The proportion of eligible establishments registered across the UK ranged from 52% in Northern Ireland to 94% in the East of England (Figure 5-4); and
- In addition, almost 20,500 establishments successfully applied to be part of the Get Set Network (i.e. schools demonstrating further commitment to the Games values), representing 66% of eligible establishments.

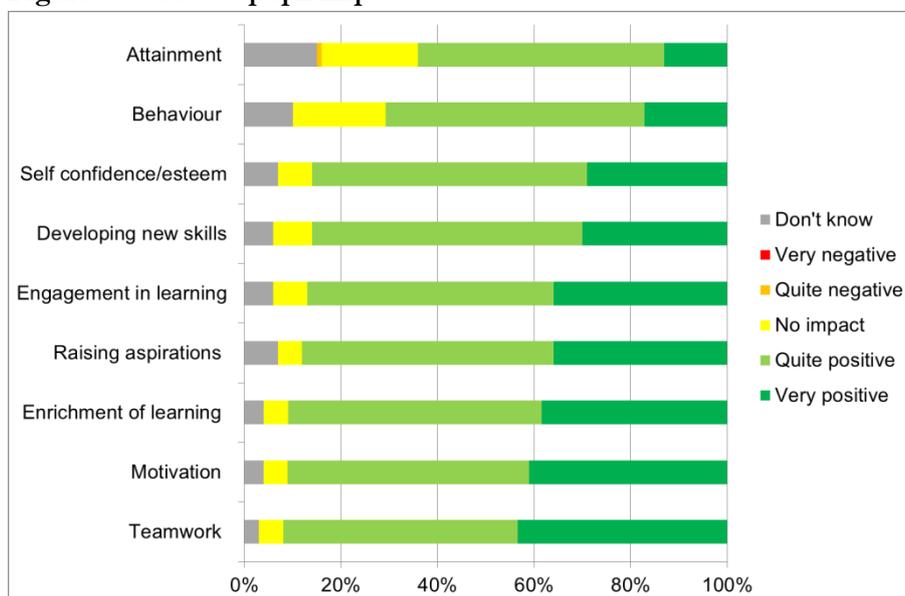
Figure 5-4: Percentage of eligible establishments registered with Get Set



Source: London Organising Committee of the Olympic and Paralympic Games, 2012

Survey evidence showed that teachers perceive the use of materials led to a range of positive personal development outcomes for pupils, including improved teamwork skills, engagement and motivation (Figure 5-5).¹⁹⁸ Outcomes such as engagement in learning may be indicative of a positive impact on aspirations. The Get Set evaluation focused on research with teachers and did not include any survey research with the young people themselves.

Figure 5-5: Get Set pupil impact



Source: Nielsen, 2012

Further evidence of the impact on pupils is provided by research which was commissioned by the then Department for Children, Schools and Families (now Department for Education) to explore whether schools and colleges were using the London 2012 Olympic Games and Paralympic Games and their associated values to help deliver their objectives for school sport and physical education.¹⁹⁹ Almost two-fifths of pupils surveyed reported that they had learnt or done an activity related to the Olympic Games or Paralympic Games in the last school year (39%) and, of this group, over three-fifths said that this took place during PE and Sport lessons (62%) and one-third reported learning about the Games in other lessons (32%), including history/geography, PSHE/ citizenship and design technology or ICT.

Secondary school pupils and students in further education were asked about the wider benefits that involvement in sports and other activities connected to the Games might have for young people: 62% thought that this would improve confidence and communication skills, although fewer thought that it would have this effect on them personally (52%). In addition, 67% felt that involvement in sports and other activities connected to the Games would improve what young people feel they can do and achieve, although again fewer thought that it would have this effect on them personally (58%).

Children and young people were also engaged by many other Games-related community projects. A survey of Inspire Mark project leads revealed high numbers of children attended or took part in activities, and it is estimated that 40% of Cultural Olympiad projects targeted young people, including Stories of the World and Tate Movie.

There was also significant engagement from the higher and further education sectors, facilitated by the work of Podium which played an important role in communicating Games-related opportunities to the sector and coordinating activity. More than 520 further and higher education colleges and institutions across the UK delivered activities related to the Games

¹⁹⁸ Nielsen (2012) *Get Set Evaluation Report*

¹⁹⁹ TNS-BMRB (2011) *Schools' and colleges' engagement with the 2012 Olympic and Paralympic Games: PE and sport*

(which comprises 94% of the higher education sector and 91% of the further education sector).²⁰⁰ Significant numbers of students from universities and colleges were involved in supporting various aspects of the Games, including torch relays, ceremonies, test events, training camps and other volunteering schemes. For example, more than 20,000 students and recent graduates under the age of 24 took part in the Games Maker programme.²⁰¹ The institutions themselves also benefited from opportunities to host training camps, develop new partnerships, undertake research and build their profile and reputation.

There was agreement from stakeholders that the spirit of the Games and the Olympic and Paralympic Values provided a useful way to engage with children and young people and that feedback from practitioners was that the Games had a strong inspirational effect up and down the country. In particular, the Games provided an opportunity to encourage children to be more active rather than spending time indoors. However, it was noted by one stakeholder that being active is not just about participation in formal sports activities, as it can also involve more general outdoor play and games.

Research with young people undertaken on behalf of Legacy Trust UK showed a great deal of positivity about the Games and its effects,²⁰² with 84% of survey respondents believing that the Games had made a positive difference to the UK and 61% agreeing that it had transformed the lives of young people, inspiring them to aim higher, work harder and get more involved in sports and other activities.

Following the Games it was announced that a partnership of the BOA and BPA would take the Get Set programme forward to ensure that it continues to be available to schools across the UK through a new website providing a range of resources focused on the Olympic and Paralympic values. This will help to ensure that this material continues to be available as a legacy of the Games.

5.11 What indications are there that relevant legacy interventions improved social and economic life opportunities for participating children and young people, and particularly hard-to-reach participants, and how was this achieved?

In addition to projects which engaged with children and young people in general, there were a number of interventions, notably Young Leaders and Opportunity Inspired by 2012, which focused on identifying and engaging disadvantaged youngsters by using the Games as a means to provide new opportunities and inspire a change in circumstances.

The evaluation of Opportunity Inspired by 2012 showed that the initiative was successful at engaging the target group. Qualitative evidence suggested that participants benefited from personal development and achievement of softer outcomes as a result of the programme, which suggests that this may contribute to improved social and economic opportunities for participants in future.²⁰³ However, there is limited evidence of outcomes from this evaluation due to a relatively low survey response rate and lack of monitoring data reporting on quantitative outcomes.

Evaluation of the Young Leaders programme also showed that it was successful at engaging with disadvantaged young people, achieving its recruitment targets (100) and also exceeding expectations around retention (79 successfully completed the programme). More than four in five Young Leaders (84) recorded positive outcomes in terms of moving into work, training, volunteering or education. In addition, more than three-fifths (62) had the opportunity to take part in the Games Maker programme and a further 4 took up paid employment during the Games in the official catering, hospitality and security teams, while 3 worked with BP to undertake volunteering roles within the Olympic Park. Young Leaders also reported a range of

²⁰⁰ SPEAR (2012) *The Engagement of Further and Higher Education with the London 2012 Olympic and Paralympic Games*

²⁰¹ Podium (2012) *Legacy Live*

²⁰² Legacy Trust UK (2013) *Have we Inspired a Generation?*

²⁰³ Institute of Youth Sport (2012) *Evaluation of the Opportunity Inspired by 2012 Scheme*

positive outcomes such as increased confidence and improved skills in areas such as communication, teamwork and problem solving.²⁰⁴

As noted, some young people benefited from relatively intensive interventions through programmes such as Young Leaders and Opportunity Inspired by 2012, which focused on encouraging progression to employment or education for those from disadvantaged backgrounds. More generally, the research commissioned by Legacy Trust UK provides evidence the Games provided an inspirational effect, although it is too early to tell whether this will translate into improved economic and social outcomes for young people later in life.

Activity under this sub-theme aimed to use the Olympic and Paralympic values as a means to inspire and motivate children and young people. Key programmes were not explicitly focused on improving educational performance; however, teachers who took part in the Get Set evaluation reported a positive impact on behaviour and attainment which could help to generate positive educational outcomes linked to improved economic and social opportunities.

Encouraging sustainable living

5.12 To what extent and in what ways did the Games inspire people to live more sustainably, and what were the benefits of this?

There is a range of monitoring and survey data which provides initial indications of the role of the Games in inspiring people to live more sustainably; however, further monitoring will be required to robustly explore the extent to which any change in behaviour is sustained.

Evidence shows that a significant number of people participated in Games-related sustainability activities, including the ODA's active travel programme, the 4 Defra funded Inspiring Sustainable Living (ISL) projects and the ODA Retrofit programme which helped to improve the energy efficiency of over 5,000 homes and 12 schools in four of the Host Boroughs. Those visiting Games venues were also encouraged to adapt sustainable behaviours for example by making use of new cycling/ walking routes to access the venue and separating their litter into the correct bins for recycling.

Monitoring of travel behaviour during the Games revealed increases in the number of cyclists and pedestrians in both Central and East London, which is likely to reflect a combination of an increase in the number of people needing to travel (e.g. tourists) and some shift towards walking and cycling amongst regular travellers.²⁰⁵

(i) Transport

Surveys undertaken by Transport for London²⁰⁶ showed that on an average weekday during the Olympics, 35% of regular travellers changed their travel behaviour in order to mitigate against the possible negative effects of increased demand during Games-time. Of these, 20% reduced their travel and 15% changed the mode, route or time of their journey.

Further analysis of commuting trips showed that 13% of those who worked at least one day during the Games changed their mode of travel to work which led to a reduction in the proportion travelling by London Underground/ DLR (from 30% before to 22% during the Games) and an increase in walking and cycling (from 20% before to 27% during the Games). This evidence suggests that the Games prompted at least some shift towards more active and sustainable modes of travel.

It was hoped that interventions such as the Active Travel Programme would result in some sustained change to travel patterns. However, a post-Games wave of the panel survey of regular

²⁰⁴ Sky Blue (2012) *Evaluation of the London 2012 Young Leaders Programme*

²⁰⁵ London Organising Committee of the Olympic and Paralympic Games (2012) *Post Games Sustainability Report*

²⁰⁶ Transport for London (forthcoming) *Olympic Legacy Monitoring: Personal Travel Behaviour during the Games. Travel in London Supplementary Report*

travellers undertaken by Transport for London found only a small level of sustained change in travel behaviour: 15% of regular travellers who made a change to their travel during the Games have continued with that change, equivalent to 11% of all regular travellers. In particular, there had been no significant change in the mode share of commuting journeys when comparing journeys before and after the Games.

As part of the post-Games survey, travellers were also asked what benefits they had gained from their experiences of travelling during the Games and the most common benefit was an intention to walk or cycle more (reported by 26% of commuters and 29% of leisure travellers), which perhaps suggests that the experience of the Games may have made travellers more aware of, or open to, the option of walking or cycling for some or part of a journey. This finding is mirrored by the results of a survey of Londoners undertaken by the Greater London Authority which revealed that, as a result of what they had seen and heard during the Games, 35% of respondents said they had been encouraged to walk more and 23% to cycle more. This again supports the finding that the Games made people more open to walking or cycling.²⁰⁷

The transport system was acknowledged to have worked well during the Games and the provision of free travel on public transport for ticket holders sent a strong message that there was no need for a car to get around in London. However, one stakeholder commented that provision of free travel on public transport perhaps reduced the likelihood that visitors took the opportunity to try walking or cycling, although the new routes which were put in place will provide a significant legacy for local people.

(ii) Venues

It is clear that significant effort was made to ensure that London 2012 was the greenest games ever and this extended to attempts to influence travel choices during Games-time and visible promotion of recycling at venues.

The use of colour-coded bins for segregation of different waste streams conveyed a strong message that steps were being taken to recycle waste at the venues. Monitoring was undertaken to ensure that the system was being used properly to avoid contamination and ensure that communication and labelling was clear both front and back of house and this has provided lessons about how best to encourage compliance.

A number of stakeholders suggested that in and around the Olympic Park more could have been done to communicate sustainability messages. For example, details of the sustainability features which had been designed into the venues, and the communication tools which had been put in place (such as Walk in the Park), could have been more visible.

(iii) Other activity

Defra provided funding for activity which used the Games to inspire individuals to adopt more sustainable behaviours. The four funded projects encompassed a range of activity including developing interactive exhibitions, transforming derelict sites, encouraging active travel and providing green homes packs and advice to residents. The projects were successful in terms of engagement and raising awareness amongst the target populations, and encouraging higher levels of environmental volunteering. Evidence of actual and sustained behavioural change amongst participants in these four projects is more limited, primarily as a result of low survey response rates which impacted on the extent to which change could be explored. However, where evidence was obtained, one project found that 35% of respondents reported increased levels of recycling, 23% reduced energy consumption and 33% reduced water use after having received environmental resource packs. Another project found that 40% of volunteers reported starting or increasing the composting on garden waste and 36% started or increased buying second hand goods as a result of being involved in the project.

For all but one of these projects, it is not clear that the Games made a significant difference to the outcomes which were achieved. Making a strong link between sustainability messages and

²⁰⁷ GLA Intelligence Unit (forthcoming) *Post Games Online Survey Results March 2013*

the Games proved to be a challenge and the Games did not emerge as a significant motivating factor for participants.

There is evidence of legacy emerging from all four ISL projects; BioRegional, East Potential, Groundwork and Sustrans all plan to use lessons from delivery of ISL projects to inform further work going forward, and Groundwork and East Potential have already secured further funding to continue similar work.

Influencing attitudes towards disabled people

5.13 To what extent have the 2012 Games increased levels of awareness and understanding of disability amongst young people and the general public (including through influencing media coverage and education legacy work at home and abroad)?

The plan for extensive television and multi-media coverage of the Paralympic Games was intended to contribute to challenging and changing perceptions of disabled people

Channel 4, as the broadcaster selected to cover the Paralympic Games, aimed to provide more comprehensive coverage than ever before, reach the largest UK audience ever for a Paralympic Games, support disabled on-screen talent and change attitudes to disability sport and to disabled people more widely.

There were a number of developments and initiatives before and during Games time to promote positive attitudes towards disabled people. Specifically, Channel 4 made a significant investment in pre-games media publicity and coverage. This was Channel 4's largest ever campaign across 78 channels and over 2,000 poster sites – and it was regarded as 'unprecedented'.²⁰⁸ The pre-Paralympics TV campaign used the tagline "Thanks for the Warm-Up" to encourage the general public to view the Paralympics as a thrilling sporting event in its own right. The campaign achieved significant penetration, with an estimated 86% of the UK population seeing the on-air marketing.²⁰⁹ Channel 4 stakeholders felt that the marketing campaign raised the importance of the Paralympic Games and the investment in it demonstrated Channel 4's commitment to the stated objectives. By the end of August, when the Paralympic Games started, unprompted awareness of the Games had risen from 16% to 77% of the general public.²¹⁰

Stakeholder consultations also provide useful context.²¹¹ In the period prior to the Games, stakeholders agreed that there had been what was broadly described as a 'general hardening' of public attitudes towards disabled people, particularly linked to negative press coverage which used rhetoric around benefits uptake and benefits misuse and mis-claiming among disabled people. This perception was based on feedback received directly from disabled people to stakeholder organisations and charities representing disabled people, and on independent research which they had commissioned.²¹² For example, Scope commissioned a ComRes poll (Scope, 2012)²¹³, which showed that almost half of disabled people (46%) thought attitudes towards them had gotten worse in the last year. This included increases in low level hostility, name calling, unhelpfulness, aggression etc. Stakeholders generally agreed with the evidence detailed above that the Paralympic Games in particular was a unique opportunity to change the way people think about disabled people.

²⁰⁸ Stakeholder consultations with Channel 4, December 2012

²⁰⁹ Channel 4 (2012) *The London 2012 Paralympic Games. Brought to you by Channel 4*

²¹⁰ *Ibid*

²¹¹ A number of stakeholders were consulted on their reflections on any evidence of a legacy of a change in public attitudes, including a number of charities representing disabled people and disabled groups.

²¹² Source: Stakeholder feedback

²¹³ Scope (2012) <http://www.scope.org.uk/news/paralympic-attitudes>. Accessed March 2013

During Games-time, Channel 4 committed to a target of 150 broadcast hours across the 11 days of the event, exceeding all previous benchmarks for hours of coverage and viewing figures. They over-delivered on this target. More than 500 hours of coverage were broadcast across all platforms, 350 hours over the stated target and four times more than was broadcast from the Beijing Paralympics in 2008.²¹⁴ There was also significant uptake of Paralympic coverage across social media channels.²¹⁵ The Paralympic coverage reached an unprecedented share of the audience, achieving record viewing figures. Almost 40 million people – more than two thirds of the UK population – viewed the Paralympic Games on TV.²¹⁶ Overall, 25% of all TV viewers watched Channel 4's coverage every day. Peak viewing levels reached 11.6 million for the opening ceremony, which was Channel 4's biggest audience in more than a decade. This level of reach represented a 251% increase in daily reach compared to the viewing figures for the 2008 Paralympic Games in Beijing.²¹⁷ This level and extent of the viewing of Paralympic sport on television would not have happened if London had not hosted the Games.

During Games-time there was also significant media coverage and publicity alongside that provided by Channel 4 from across media suppliers. The Office for Disability Issues (ODI) worked with Channel 4 and other Olympic sponsors to emphasise awareness and attitude change. Press coverage during Games time also saw the Minister for Disabled People raising awareness about disability. The ODI worked with the BPA to produce a media guide for sports journalists to encourage reporting on the Paralympics; 200 copies were originally distributed then a further 200 copies were required to meet demand, plus further copies were downloaded online. During Games-time, disability organisations and charities also did a lot of press work and awareness raising activity to try to promote this agenda. For instance, over the 3-week Games-time period Scope did more than 100 media interviews on what life is like for disabled people. They reported that this provided a level of access to and coverage in media outlets which was unprecedented.

During 2012 a module of questions was added to the British Social Attitudes Survey to provide evidence on attitudes towards disabled people. Attitudes towards disabled people, as measured by this survey previously, had improved between 2005 and 2009, although some of these changes are small and may not be statistically significant.²¹⁸ From 2005 to 2009 a smaller proportion of people said that they thought of disabled people as 'getting in the way' (7% compared with 9% in 2005) or with some 'discomfort and awkwardness' (17% compared with 22% in 2005). People were also more likely to think of disabled people as the same as everybody else (85% in 2009 compared with 77% in 2005). The questions were repeated in 2012 through a further wave, and overall results show that attitudes had levelled off. A similar proportion of people (7%) thought of disabled people as 'getting in the way' in 2012 which had not significantly changed since 2009. A consistent proportion (18%) of people also said they thought of disabled people with some 'discomfort and awkwardness', showing little change since 2009 data. A slightly smaller proportion said they thought of disabled people as the same as everybody else (82% in 2012 compared to 85% in 2009).

Further analysis of the 2012 British Social Attitudes Survey shows that over 80% of respondents felt that disabled people faced at least some level of discrimination in Britain in 2012 and respondents with a disability were more likely to state that there was 'a lot' of prejudice against disabled people compared to people with no disability. Comparing this to results from previous years suggests that people's perception about prejudice faced by disabled people in Britain does vary, and that overall the fluctuations do not indicate a pattern of either increasing or decreasing prejudice over time (Figure 5-6).

²¹⁴ Channel 4 (2012) *The London 2012 Paralympic Games. Brought to you by Channel 4*

²¹⁵ *Ibid*

²¹⁶ Channel 4 (2012) *The London 2012 Paralympic Games. Brought to you by Channel 4, 2012*. Based on three minute reach of TV coverage over duration of the Paralympic Games.

²¹⁷ Channel 4 (2012) *The London 2012 Paralympic Games. Brought to you by Channel 4*

²¹⁸ Office for Disability Issues, (2010) *Public Perceptions of Disabled People: Evidence from the British Social Attitudes Survey 2009*. Based on specific modules on attitudes towards disabled people asked in 2005 and 2009 in British Social Attitudes Survey (BSAS).

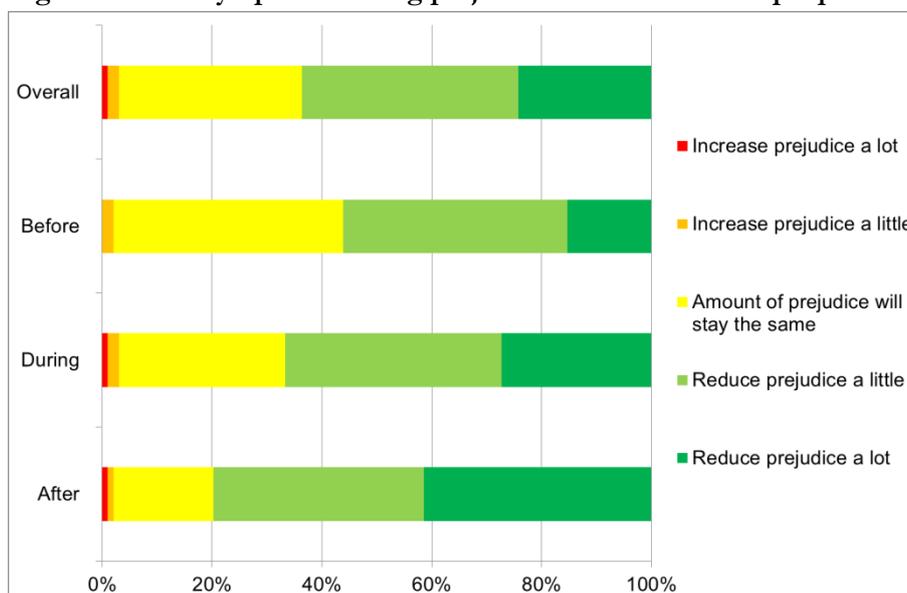
Figure 5-6: Level of prejudice faced by disabled people in Britain by year

	1998	2000	2005	2009	2012
A lot	25%	35%	25%	26%	30%
A little	51%	51%	50%	53%	51%
Hardly any	15%	9%	17%	15%	14%
None	6%	3%	8%	5%	4%
Don't know	2%	2%	1%	1%	1%

Source: *British Social Attitudes Survey, NatCen Social Research (2012)*; *Office for Disability Issues, Evidence from the British Social Attitudes Survey (2009)*

Note: Sample sizes vary by year

A module of questions specifically around the 2012 Games in the BSAS data show more positive results about the role the Paralympics could play in reducing prejudice and views of disabled people. Just under a quarter of respondents felt that the Paralympic Games would reduce prejudice 'a lot', and almost 40% felt it would reduce prejudice 'a little'. In over half of all cases, respondents stated that their personal view of disabled people would remain the same after the Paralympic Games; however, over 40% stated that they would have a more positive view (either more or much more positive) (Figure 5-7). However, the fieldwork for the 2012 BSAS was undertaken throughout 2012 and the proportion of people who felt that the Paralympic Games would reduce prejudice a lot increased significantly amongst those surveyed after the Games (41%) compared to those interviewed before (15%) or during the event (27%). It is not possible to draw any conclusions about lasting change from this wave of the research.

Figure 5-7: Paralympics reducing prejudice towards disabled people in Britain

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

Note: n =3,248

Other public attitude surveys commissioned before, during or shortly after the Paralympics showed similar levels of optimism about the effect the Games would have on attitudes towards disabled people. For example, prior to the Games, Scope commissioned a piece of research among disabled people to test out their views on the potential of the Games for changing public attitudes. This research (August 2012) found that 62% of disabled people and their families believed the Paralympics could improve attitudes towards disabled people.²¹⁹ Similarly, an Ipsos MORI poll in September 2012 found that eight in ten (81%) of those surveyed felt

²¹⁹ Scope (2012). See <http://www.scope.org.uk/news/paralympic-attitudes>. Accessed 4 April 2013.

that the London 2012 Paralympic Games has had a positive effect (either very or slightly) on the way disabled people are viewed by the British public.²²⁰ Games-related questions were included in five waves of the Office for National Statistics Opinions and Lifestyle Survey (November 2012 to March 2013). In the November wave of the survey, just under three-quarters of respondents (73.9%) reported that they tended to think of disabled people as the same as everyone else 'most of the time,' falling to 70.7% in December. In January, 76.9% reported that they tended to think of disabled people as the same as everyone else 'all of the time' or 'most of the time' with this being the case for 76.4% in February and 75.3% in the March. The proportion indicating they 'never' thought of disabled people as the same as everyone else ranged from 2.5% to 6.1% over this time period.²²¹ Around a quarter of respondents in each wave of the survey stated that the 2012 Paralympic Games had caused them to have a 'much more positive view' of disabled people, a further quarter responded that it had resulted in them having a 'more positive view' and just under half of respondents reported that their view had stayed the same.

In addition to media coverage surrounding the Paralympics, programmes such as Get Set helped to raise awareness of the Paralympics amongst children and young people. 69% of the participating teachers surveyed believed that involvement in Get Set had helped to generate a positive change in pupil attitudes towards disability.

Analysis of media content in the period from 2008 up until the end of 2012 also showed a significant improvement in the way disability is reflected in the press.²²² Overall, this analysis found that in the UK press, there has been increased use of preferred (or more accepted) terms for referring to disabled people, while the use of less acceptable terms for referring to such people was in sharp decline. Specifically, media coverage in 2012 had the largest overall frequency of preferred terms by a significant margin compared to all other years studied (2005-2011). This indicates a major shift in the discourse surrounding disability in the year of the Paralympics. There was also a significant decline of the use of dis-preferred terms that implied a greater awareness in usage of terminology about disability in the year of the Paralympics. Use of terms which define people solely on their disability dropped significantly in the UK media in 2012, which the authors of the media analysis suggest indicated a UK media consensus that such use is disempowering and undemocratic. The authors also found that in the UK press reporting around the Games, disabled people were represented as playing a more active part of society.

Stakeholders also widely agreed that the Channel 4 and wider press coverage of the Paralympics was effective in promoting more positive images of disabled people and in positively influencing public attitudes during Games-time. One stakeholder commented:

This was a never before seen opportunity to find out what it's like to be disabled and to test out having that open space to talk about disability. Channel 4 gave everyone room to talk - they didn't shy away from it. For example programmes like 'The Last Leg' really gave space to talk about disability. As well as incredible sporting achievements people got to find out what life was like for Paralympians (and other disabled people too) and thanks to shows like the Last Leg we also had an atmosphere where we could talk more openly about disability. This climate of openness was vital. (Stakeholder)

However stakeholders broadly agreed that the improvement in attitudes was at risk of being a relatively short term improvement and that developments and press coverage since the end of the Games, especially in the first months of 2013 around the context of media coverage and

²²⁰ See <http://www.ipsos-mori.com/researchpublications/researcharchive/3038/Superhuman-Paralympians-change-view-of-the-disabled.aspx>

²²¹ Response options changed in the January wave of the survey to include an 'all of the time' option.

²²² Tony McEnery, Amanda Potts and Richard Xiao (2013) *London 2012 Games Media Impact Study*. The study covered approximately 13 billion words of general English from 2008 and 2012, 93 million words of UK National Newspaper reporting and 35 million words of Global Press reporting.

portrayal of the benefit reforms, had affected the improvements felt during Games-time. This view was largely qualitative but research evidence commissioned by Scope provided some detail. A survey conducted in December 2012 showed that:

72% of disabled people think that the Paralympics have had a positive impact on attitudes. 20% say it's changed the way people talk to them and 20% say it's made people more aware of their needs. However, 54% say they experience discrimination on a regular basis with 84% of disabled people saying people patronise them and 63.5% saying they have experienced people refusing to make adjustments or do things differently.²²³

Generally this data indicated some level of improvement in awareness but that issues remain around how the public respond to and view disabled people. Stakeholders commented that:

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

A further concern of stakeholders was that the Paralympic coverage might affect public perceptions in suggesting that all disabled people were capable of becoming Olympic athletes. It was felt that the coverage of the Channel 4 'superhuman' campaign might have polarised coverage of, and attitudes towards disabled people, meaning the public might as a result perceive disabled people as super athletes or as 'benefits scroungers' and that actually the majority of disabled people were neither. Stakeholders were also concerned that the coverage might have raised expectations about disabled people's needs:

It's all great but it may give the public the impression that disabled people can do it all and don't need help any more. Some disabled people still need high levels of care, social care and support to help with independent living etc. and to get out of bed in morning. The message needs to be: don't turn your back on us; we can't all be Paralympians! (Stakeholder)

Stakeholders commented that embedding coverage of disabled people in media coverage going forward will be vital in sustaining any legacy of improved attitudes. Channel 4's attempts to do this through further programmes, such as the follow up series of *The Last Leg* which ran in March 2013, demonstrate a commitment from the broadcaster to doing this.

Overall, evidence shows that in the build up to the Games there was great optimism and expectation that the Channel 4 and wider coverage would positively influence attitudes towards disabled people. Evidence generally suggests an extremely positive effect on public attitudes towards disabled people during Games time. Media content analysis shows that use of negatively worded descriptions of disabled people has been decreasing over time and positive terms increasing, and that during Games time there was a peak in the level of coverage of disabled people using positive and empowering terminology. Tracking of public attitudes via the British Social Attitudes Survey data from 2005 to 2012 showed that people's perception about prejudice faced by disabled people in Britain varied but top-line trends did not show a significant change. Timing of the survey (fieldwork being largely pre-Games) may be a contributing factor to this. However, there is evidence that people perceive the Games has led or will lead to an improvement in attitudes. The lasting legacy of any longer term effect on public attitudes will require further tracking.

²²³ Scope (2012). See <http://www.scope.org.uk/news/paralympics-poll>. Accessed March 2013.

5.14 To what extent have the 2012 Games increased positive perceptions of and pride in the talents of disabled people (amongst both disabled and non-disabled people), through the work of UK broadcasters and through supporting and celebrating sporting, cultural and community achievements across the UK?

The Games provided numerous initiatives which aimed to increase positive perceptions of and pride in the talents of disabled people. These included the work undertaken by Channel 4 and a number of projects within the Cultural Olympiad programme which showcased the work of deaf and disabled artists, including Unlimited.

Channel 4 made a commitment that 50% of on-screen talent for Paralympic broadcasts would be disabled people. In 2010, the on-screen talent programme recruited and trained a pool of eight disabled presenters, including Irish presenter Daráine Mulvihill and former Royal Marine Arthur Williams working in the studio and new reporters on location, such as former Paralympic swimmer Rachael Latham and sports reporter and wheelchair basketball player Jordan Jarrett-Bryan. Channel 4 confirmed expenditure of £600,000 on the nationwide search for on screen disabled talent and a further £250,000 has been planned to be invested to develop the presenters' careers post-Games. In post-Games research, Channel 4 found that 82% of those surveyed said they enjoyed the fact there were disabled presenters.

The Channel 4 coverage also gave prominent and unprecedented levels of coverage to disabled athletes who became 'household names' during the Games. The "Meet the Superhumans" featured close up imagery of Paralympic athletes, designed to make the public feel more comfortable watching disabled athletes. The "Meet the Superhumans" advert aired simultaneously on nine channels on one evening during the build-up period. The campaign achieved significant penetration, with an estimated 86% of the UK population seeing the on-air marketing.²²⁴

As described above, Channel 4's Paralympic coverage reached an unprecedented share of the audience, achieving record viewing figures. Almost 40 million people – more than two thirds of the UK population – viewed the Paralympic Games on TV.²²⁵ A total of 6.3 million viewers watched Jonnie Peacock win the T44 100m Gold medal, the largest rating for a single competition event. This level of reach represented a 251% increase in daily reach compared to the viewing figures for the 2008 Paralympic Games in Beijing.²²⁶ This level of interest in Paralympic TV coverage and disabled sports personalities is unlikely to have happened without London hosting the Games. Stakeholders also agreed in consultations that the coverage of Paralympic athletes helped promote positive images of disabled sports personalities and led to a groundswell of pride in disabled talent that was on show. Later on in 2012, three Paralympic athletes made the top 12 shortlist for BBC Sports Personality of the Year and David Weir and Ellie Simmonds were placed fifth and sixth, respectively. Team GB and Paralympics GB were collectively awarded Team of the Year.²²⁷

Overall, the level of prominence given to disabled athletes and artists during the Games was unprecedented. It was therefore highly unlikely to be sustained at the kind of level achieved during the Games; however, ongoing plans at Channel 4 for future coverage of disabled sport may go some way to embedding the sports in mainstream coverage.

²²⁴ Channel 4 (2012) *The London 2012 Paralympic Games. Brought to you by Channel 4*

²²⁵ Channel 4 (2012) *The London 2012 Paralympic Games. Brought to you by Channel 4*. Based on three minute reach of TV coverage over duration of the Paralympic Games.

²²⁶ ²²⁶ Channel 4 (2012) *The London 2012 Paralympic Games. Brought to you by Channel 4*

²²⁷ <http://www.bbc.co.uk/sport/0/sports-personality/20748902>

6 Driving the Regeneration of East London

6.1 Introduction

The acceleration of the regeneration of East London is a central component of the legacy of the 2012 Games.

East London has suffered from long-standing and deep-set social and economic problems. 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 provided a unique opportunity to tackle, both directly and indirectly, the deprivation and other challenges East London faces and contribute to its social and economic transformation.

In headline terms, the legacy strategy for East London can be summarised by two inter-related and over-arching objectives:

- 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, as a direct result of the Games, in venues, infrastructures, utilities and the environment; and
- Securing a socio-economic legacy from the Games in the host boroughs²²⁸ 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".²²⁹

These headline objectives have resulted in a broad suite of investments and activities focused on the regeneration of East London, all of which can be grouped under the four legacy sub-themes of transforming place, transforming communities, transforming prospects and convergence. These sub-themes have provided a framework for the analysis and synthesis of the emerging evaluation evidence as part of the meta-evaluation.

Transforming place

6.2 What have been the key lessons from the preparation of the site for the Olympic Park and Village?

The creation and subsequent transformation of the Olympic Park site sits at the heart of this sub-theme as it has been, and will continue to be, central in the physical transformation and regeneration of East London. Based on the evidence available it can be concluded that while there were emerging plans for the redevelopment of Stratford²³⁰, without the Games the largely derelict, polluted and inaccessible site that ultimately became the Park would have remained as it was for the foreseeable future. This research question seeks to identify the lessons that can be learnt from the process of turning a site of this nature into the Olympic Park and Village.

Through the evidence available, coupled with the insight of a number of stakeholders, it is possible to identify four key lessons that have emerged from the preparation of the site. This

²²⁸ This includes the six London Boroughs of Greenwich, Hackney, Newham, Tower Hamlets, Waltham Forest and Barking and Dagenham. Their work is led and coordinated by a dedicated Host Boroughs Unit.

²²⁹ Host Boroughs (2009) *Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs*

²³⁰ The Lower Lea Valley Area Development Framework set out the strategy and plan for the area to 2023. Two versions of the document were created, the first would be adopted if the bid to host the Games was won, the second if the bid was unsuccessful. The plans covered Stratford/Hackney Wick (the area covered by the Olympic Park), Bromley-by-Bow/West Ham and South Poplar/Canning Town. However, while these plans existed it is not possible to know how quickly they would have been brought forward and more significantly what the impact that the housing price crash and economic recession of 2008-2010 would have been on their scale and nature.

evidence base is of a reasonably high quality as it draws on both relevant and well executed evaluations and a range of other sources which provide valuable insight and supporting evidence (i.e. ODA progress reports and updates).

(i) Boldness in delivery

The London Development Agency (LDA) was one of the key agencies tasked with leading the early stages of land acquisition and site preparation. It is apparent from the evaluation of the LDA's activities²³¹ that in delivering its activities the LDA demonstrated a boldness that enabled the Olympic Park site to be developed on schedule and for the regeneration benefits of the 2012 Games legacy for East London to be driven forward from the earliest point possible. This boldness was perhaps most apparent in the Agency's willingness to undertake early investment in activities related to the Games, including:

- Seeking advice on legal, financial, property and project consultancy matters relating to London's bid for the 2012 Games (May 2003) and appointment of a consortium to prepare the master plan for the proposed London Olympics in East London's Lower Lea Valley (Aug 2003) before London officially launched its bid for the 2012 Games (Jan 2004);
- Submission of a planning application for a 500 acre Olympic Park in the Lower Lea Valley covering key venues such as the main Olympic Stadium, the Aquatics Centre and the Velodrome (January 2004) prior to London being shortlisted as a 2012 candidate city (May 2004);
- Launching a design competition for the Aquatics Centre (June 2004) and selecting a winning design (Jan 2005); securing planning permission for the Olympic Park (Sept 2004); initiating the process of land acquisition (Jan 2004) and burying the powerlines located on the site (Jan 2005). All of this was undertaken prior to London being awarded the right to host the 2012 Games.

Of this early investment, the land acquisition carried the most risk as it involved the greatest cost (prior to the bid's success, the LDA acquired 86 hectares at a cost of £125 million including fees). It was however a risk that was mitigated by following four investment principles that allowed for a 'no' decision and thus enabled the LDA to acquire the land on a 'no regrets' basis:²³²

- The LDA should only buy land during the bid period which could be used for other regeneration purposes should the bid be unsuccessful;
- Land assembly for the Olympic zone should be aligned with the Olympic Legacy Master plan for the area;
- Consideration should be given to the post-Olympic legacy; and
- Land receipts from disposal should be retained by the LDA for re-investment.

The result of this process of early acquisition was that by July 2006, one year after the award of the Games, the LDA had assembled 90% of the land required for the Park by private agreement. This paved the way for the completion of the first major phase of land assembly and relocations of existing tenants according to schedule by July 2007 which was "*crucial*" to enabling the subsequent development of the venues and ultimately the timely delivery of the Games.²³³

This early preparation work also "*received praise from the IOC and experienced Olympic observers*", with Denis Oswald the Chair of the International Olympic Committee (IOC) Coordination Commission noting that: "*London already has a clear idea of the steps that need to be taken to turn its*

²³¹ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A, Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

²³² *Ibid*

²³³ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

*ambitious plans into reality. Such thoroughness is commendable and was one of the strengths of London's candidature".*²³⁴

This boldness did however come with a cost. Through the LDA evaluation of its activities in these early stages it is apparent that the LDA budget for land acquisition and remediation increased substantially from 2003 to 2011, while the total area covered by the Olympic Park site actually decreased from 161 ha to 101 ha.²³⁵ The LDA evaluation identified five factors that it believes drove this increase in cost:

- Remediation costs were substantially higher than estimated;
- Additional land was purchased in 2004 to cover a proposed increase in the total area of the Olympic Park (207 ha compared to 161 ha) although ultimately the need for a larger site did not materialise;
- Additional land outside of the Olympic Park was purchased for the relocation of local businesses and to kick-start the regeneration of other key development sites;
- Additional fees were allocated to cover the actual costs of producing the Olympic Master Plan;
- Money was spent on estate management fees (where tenants remained on site following acquisition), professional fees and stamp duty.

Stakeholders were also of the opinion that boldness was evident across the host boroughs through their willingness to come together and to form a unique Joint Planning Authorities Team to manage and agree the planning application in relation to the Olympic Park site. This boldness and willingness to relinquish control and to do something different for the benefit of the Games streamlined a process that had the potential (with four separate planning authorities) to be drawn out and complex.

(ii) The benefit of one organisation overseeing one site

Through the LDA evaluation of the Olympic Park & Lower Lea Legacy it is apparent that the decision that one organisation would be responsible for assembling all of the land in the Olympic Park resulted in a "*more comprehensive and joined up site*" than might have been possible in the absence of the 2012 Games. The evaluation notes that without this requirement, the land acquisition process "*would potentially have been more piecemeal and less integrated*" and while this may have "*resulted in lower costs (i.e. the necessity to acquire the whole site may have resulted in higher costs of land and/or the need to undertake more expensive remediation)*" and a "*better return on investment*", had it not occurred, development of the Olympic Park would have been significantly delayed, or in a worst case scenario not developed at all on this site. From a legacy perspective, the single site also provided a scale to the overall regeneration activity in East London, both in the sense of physical transformation of a significant land area and in terms of the economies of scale resulting from working with a single site.²³⁶

The idea of one organisation in the lead role continued into the development phase, with the Olympic Delivery Authority assuming responsibility for the site and the implementation of a four stage development process:

- 'Demolish, dig, design' – with milestones to the Beijing 2008 Games and a focus on preparing the site for the main construction of the venues and infrastructure both for the Games and the legacy.
- 'The big build: foundations' – with milestones to 27 July 2009 and a focus on putting in place the foundations of the main venues and infrastructure in the Olympic Park.

²³⁴ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

²³⁵ *Ibid*

²³⁶ *Ibid*

- 'The big build: structures' – with milestones to 27 July 2010 and a focus on developing the structures for the venues, the Athletes' Village and related infrastructure in and around the Olympic Park.
- 'The big build: completion' – with milestones to 27 July 2011 and a focus on completing the construction of the venues, the Athletes' Village and related infrastructure in and around the Olympic Park

The approach of one organisation in the lead continues in legacy, with the London Legacy Development Corporation (LLDC) assuming responsibility for the Olympic Park and its transformation.

(iii) A focus on legacy from the outset

From the evidence available it is instantly apparent that there was a clear commitment to securing a legacy from the 2012 Games. From the outset of the bid preparation process, and as early as May 2003, the LDA recognised the opportunity to use the 2012 Games as a catalyst for the regeneration of East London. It was always the LDA's explicit aim to use the 2012 Games to accelerate this regeneration process²³⁷, describing East London as "*London's available and spare economic capacity and asset base, and also the place with the most severe socio-economic challenges*".²³⁸ This focus was formally articulated as early as January 2004 with the submission of the planning application for the Olympic Park. This application provided a solid foundation on which all subsequent regeneration plans and frameworks for East London could be built, ensuring that the Olympic Park and wider plans for the area were fully integrated. It also meant that the desire to deliver a legacy was integrated into all of the ODA's development plans for the Park itself.

It was an approach that led the London Assembly to conclude in 2009 that London was ahead of many other host cities both in developing its proposals for the legacy use of the Olympic Park and its commitment to social transformation in East London – an approach that "*exceeds the ambitions of many past host cities*".²³⁹ This approach also received commendation from both the OECD, which noted that "*although many cities have achieved a significant legacy, and several have planned activity in advance to achieve it, few cities will have prepared for it as directly and consciously as London has*",²⁴⁰ and the Royal Institution of Chartered Surveyors (RICS) who, based on comparison with six previous event led regeneration programmes, noted that London's legacy planning represented a "*significant improvement on arrangement in previous hosts*" and that regeneration legacy planning for the 2012 Games has been "*addressed more convincingly and earlier than in most previous cases*" something that has allowed "*proposals to be debated and prepared properly*".²⁴¹

This early commitment to legacy was subsequently reinforced through the establishment of a specific organisation (the Olympic Park Legacy Company (OPLC), now the LLDC) with responsibility for the delivery of the legacy.

It was as a direct result of this commitment to deliver a lasting legacy from the outset that led Jacques Rogge the President of the IOC to comment 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*"

²³⁷ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

²³⁸ Organisations for Economic Co-operation and Development (2010). *Local Development Benefits from Staging Global Events – Achieving the Local Development Legacy from 2012*. Cited in PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

²³⁹ London Assembly, Economic Development, Culture, Sport and Tourism Committee (2009) *Literature Review: Olympic Legacy Governance Arrangements*. Cited in PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

²⁴⁰ OECD (2010) *Local Development Benefits from Staging Global Events – Achieving the Local Development Legacy from 2012*. Cited in PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

²⁴¹ Royal Institute of Chartered Surveyors Research (2011) *The 2012 Games: The Regeneration Legacy*

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".²⁴²

The Institute for Government, however, paints a somewhat different picture, reporting that at the early stages of delivery in 2005 "it was unclear what the ultimate goal or objective was for legacy in any tangible sense" with the result that "legacy got lost among more tangible goals". It notes that this lack of vision was further compounded by a lack of clear governance and "dispersed responsibility for legacy as a whole... no dedicated budget... [and] Whitehall machinery not being used effectively to get political buy-in and commitment to making legacy work".²⁴³

Through the consultations undertaken as part of the meta-evaluation it would appear that both of sides of the story are correct. London 2012 'raised the bar' in terms of legacy thinking and legacy planning was ingrained from an early stage but it did suffer from a lack of clarity. It was noted through a number of consultations that in planning for the legacy there were a number of significant challenges, not least, not fully knowing what success looked like as London was in many ways pioneering a new approach to legacy planning with no real precedent. It was a challenge that was felt to have been exacerbated by the fact that the 'immovable deadline' which drove much of the delivery in terms of Games-time did not exist with the legacy; that early on the legacy role was one of influencing others rather than delivering a programme of activity; that the lack of a body responsible for championing the legacy from the outset meant that for some venues, legacy planning was not as embedded as it could have been (with stakeholders noting the aquatics centre and the health centre in the Athletes' Village in particular); and that the practicalities of, and the need to deliver the event meant that at times the legacy had to take a backwards step (the stadium was often cited as an example of this issue as it would not have been feasible to have done a deal with a football club in time for the stadium to be built and ready for the Games). However, consultees were also unanimous in noting that at every stage, and for every element of the Games the question was asked: 'what would this be used for in legacy?'

(iv) Linked in to wider regeneration activity

As noted in the points above, both the creation of a single site and clearly setting out the legacy plans for the Olympic Park from the outset are key lessons from the preparation of the site in their own right. However, together they also point to a further lesson around the extent to which the site acquisition and preparation process was well connected to and integrated into the wider regeneration activity occurring within East London, including physical, social and economic.

In terms of the physical linkages, the most notable example is Westfield shopping centre at Stratford City where it is apparent from a number of sources that while Westfield intended to develop the shopping centre prior to the formal launch of London's bid for the 2012 Games,²⁴⁴ in reality it was "made possible by the infrastructure investment underpinning the Olympic Games".²⁴⁵ This influence was felt in two ways in particular:²⁴⁶

- The Compulsory Purchase Orders (CPOs) that the LDA implemented as part of its acquisition process benefited Stratford City/Westfield by also including land in the area which Westfield was seeking to develop for the shopping centre; and
- The impact of the economic downturn on the Stratford City/Westfield development was minimised "largely because the development was so closely linked to the delivery of the Olympic Village" and as such "it was protected by the Government under its commitments to the 2012 Games"²⁴⁷.

²⁴² Department for Culture, Media & Sport (2012) *Beyond 2012: The London 2012 Legacy Story*

²⁴³ Institute for Government (2013) *Making the Games: What government can learn from London 2012*

²⁴⁴ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

²⁴⁵ *Ibid*

²⁴⁶ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

²⁴⁷ *Ibid*

In terms of the socio-economic benefits of the site preparation these were particularly apparent through the suite of activities focused on addressing the high levels of worklessness in East London by moving unemployed residents into work or helping them to be more work ready. A notable proportion of the activity targeted at workless residents in East London was in place or would have been implemented in the absence of the Games but it was significantly enhanced as a result of the Games. For example the evaluation of the LEST 2012 programme found that about 1 in 3 of the employment opportunities created would not have existed in the absence of the LEST²⁴⁸.

In addition to these linkages, the Games also created a more integrated timetable for regeneration of this part of East London (than if London were not the host city for the 2012 Games) which had two notable impacts. First, it created a firm deadline for delivery, the absence of which would have resulted in a slower pace and required a more selective approach to regeneration. Second, (as noted above in the example of Westfield) it meant that the investment in regeneration in East London was immune from the recent spending cuts that affected a number of other regeneration projects across the UK.²⁴⁹

The benefits of these linkages were also picked up by the RICS study as it noted, in direct comparison with six previous event led regeneration programmes, that: the choice of site "*provided good opportunities for regeneration*"; that the plans built on the "*long term plans for London and existing regeneration projects*" as well as expressing "*aspirations for the wider area beyond the Olympic Park*"; and that attention was given to "*social and economic regeneration, as well as physical transformation*".²⁵⁰

6.3 How and to what extent has the rate and range of development activity and long-term management of the Olympic Park (and its venues and neighbourhoods) been secured?

The transformation of the Olympic Park is a long term goal with much of the activity in terms of the provision of new housing and social infrastructure being delivered over a 10 year timeframe, with some elements not expected to be fully realised until 2030. As such, the long term management of this process and the delivery of this goal is of vital importance to securing a lasting legacy from the Games.

In seeking to answer this research question, two main types of evidence have been drawn on. The first is the plans for the development activity currently planned for the Park, the second is the views of a number of stakeholders consulted with as part of the meta-evaluation.

In its role as custodian of the Olympic Park in legacy, much of the responsibility for the development activity of both the venues and neighbourhoods of the Olympic Park is the responsibility of the LLDC. At the heart of its work, and guiding its comprehensive programme of activity, are three headline objectives²⁵¹:

- To operate a successful and accessible park and world-class sporting venues, offering facilities for high-performance and community participation, enticing visitor attractions, and a programme of sporting, cultural and community events;
- To create one of London's most dynamic urban districts, becoming the location of choice for current residents and new arrivals and linking the Olympic Park with its surrounding neighbourhoods; and
- To create local opportunities and transformational change to promote regeneration and convergence for East London.

²⁴⁸ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

²⁴⁹ *Ibid*

²⁵⁰ Royal Institute of Chartered Surveyors Research (2011) *The 2012 Games: The Regeneration Legacy*

²⁵¹ London Legacy Development Corporation (2013) *Three Year Business Plan 2013/14 – 2015/16*

(i) The rate and range of development activity

When the Games drew to a close in September 2012 the Olympic Park was handed over to the LLDC to embark in earnest on its ambitious programme of transformation: to turn the Olympic Park in to "*one of London's most dynamic urban districts*"²⁵². This programme of activity, formerly known as the Legacy Communities Scheme, is intended to result in:

- 6,870 new homes, of which 35% would be affordable and 42% family homes;²⁵³
- Over 4,000 end-use jobs (excluding construction), of which between 25 and 75% are estimated to be for residents of the host boroughs, depending on the nature of the contract and works;
- Over 2,000 peak workforce construction jobs, of which at least 25% are estimated to be for local residents;
- 102 hectares of open space and 45 hectares of bio diverse habitat;²⁵⁴
- Two primary schools, one secondary school and nine nurseries;
- Three health centres;
- A number of multi-purpose community, leisure and cultural spaces; and
- Millions of visitors to the Park and the venues that remain post-Games;

Alongside this planned investment the community will over time also benefit from a diverse range of infrastructure improvements and developments that also served Games-time purposes. These include the Athletes' Village, the public realm and the transport improvements, the conversion of the press and broadcast centre into iCITY, as well as the six permanent venues: the Aquatics Centre, the Olympic Stadium, the Copper Box, the ArcelorMittal Orbit, the Hockey and Tennis Centre and the Velopark (which includes the Velodrome, the BMX track and mountain bike trails). Together these infrastructure improvements along with others such as Westfield and the Birkbeck/ University of East London campus, will all positively contribute to the transformation of East London.

It is apparent from the LLDC's Three Year Business Plan 2013/14-2015/16 that it has already made significant progress since it took ownership of the Park²⁵⁵:

- The transformation works have commenced and are currently on schedule;
- All permanent venues now have permanent operators;
- The first tenant has occupied part of the Broadcast Centre (now known as iCITY);
- Planning consent was granted in September 2012 for the Legacy Communities Scheme; and
- The North Park is scheduled to re-open on 27 July 2013 and the South Park in Spring 2014.

(ii) Securing the longer term management of the Olympic Park

It is clear there is a significant amount of development activity on the Park, but in seeking to understand the extent to which the longer term management of the Olympic Park has been secured a number of inter-related points can be made.

The first is the role and remit of the LLDC itself. As a development corporation, the LLDC acts as the local planning authority with regard to planning approvals within its designated area. Stakeholders felt that the responsibilities associated with this role would help to ensure that the

²⁵² London Legacy Development Corporation (2013) *Three Year Business Plan 2013/14 – 2015/16*

²⁵³ This is in addition to the 2,818 additional homes provided as a result of the conversion of the Athletes Village.

²⁵⁴ This includes 9.9ha of open space and 9.4ha of Biodiversity Action Plan habitat to be delivered specifically as a result of the Legacy Communities Scheme and in addition to that created as a result the development of the Olympic Park for the purposes of the Games.

²⁵⁵ London Legacy Development Corporation (2013) *Three Year Business Plan 2013/14-2015/16*

Olympic Park and the surrounding area are developed in a coordinated and concerted way to the maximum benefit of the local community.

Second, whilst LLDC is responsible for overseeing the delivery of the Park, they will need to work closely with others (for example Lend Lease and the development of the International Quarter in Stratford City) in the development, delivery and longer term management of the Olympic Park. As noted, all of the permanent venues now have permanent operators. Greenwich Leisure Limited (GLL) will operate the Aquatics Centre and the Copper Box; the Lee Valley Regional Park Authority (LVRPA) will operate the Hockey and Tennis Centre and the Velopark; Balfour Beatty Workplace will run the ArcelorMittal Orbit and manage the maintenance of the Park; iCITY will operate the broadcast and press centres; and West Ham United Football Club will operate the Olympic Stadium.

For the press and broadcast centres and the Olympic Stadium, securing operators has not been easy. A number of stakeholders noted that this may in part have been the result of the fact that neither facility was built with legacy at the forefront, as the need to deliver in time for the Games meant that negotiations around legacy had to be a lower order priority. However, stakeholders did also point out the post-Games use of venues by local organisations such as GLL and the LVRPA was a positive step in ensuring both effective management but also the longer terms engagement of and integration with the wider community.

Third, several stakeholders noted that because of the success of the Games and work done by the ODA, the LLDC was able to get off to 'best start possible'. The view was that the success of the Games had created a sense of trust amongst the public that a legacy would emerge while the work of the ODA ensured that solid legacy foundations were in place from the outset (despite the noted concerns with venues such as the stadium not being considered vis a vis legacy from the outset). For example, the creation of 100 hectares of greenspace, the planting of 4,000 semi-mature trees, the undergrounding of 52 power pylons, the creation of a new utilities network and the creation of permanent sporting venues all contribute positively to the development of the Park. The use of temporary venues for those sports (such as Water Polo and Basketball) where it was felt that there was not the demand to sustain a permanent facility or there was already a suitable existing venue meant that LLDC was not saddled with any 'white elephants' or buildings for which there was no obvious legacy use. Having been given this positive start, a number of consultees noted the need for the LLDC to retain the sense of urgency that existed around the Games, as this would be essential in driving the transformation activity forward.

Finally, the continued support of both the Mayor of London and central government – through the creation of a Cabinet Office team with a focus on ensuring a legacy from the Games, coupled with the fact that a broad degree of consensus remains in terms of cross-party support, ensures that the delivery of the development activity in relation to the Park has the required political support and backing .

This, however, is not to say that the delivery of the development activity is not without challenge. Through the consultations with stakeholders, it was possible to identify four challenges in particular:

- The need to balance the commercial drivers of operating a successful venue with the need to ensure that the venue is a facility and asset for the local community;
- The need to proactively manage the different users of the Park so that the residential areas are as successful and popular as the venues. This, it was noted is not so much a challenge for year 1 – when a degree of excitement and novelty remains – but much further down the line in terms of the life of the Park;
- The need to deliver a large scale and multi-faceted development and regeneration programme with limited resources and a number of competing wider pressures (such as the desire for increased residential development across London); and

- The need to think about accountability and responsibility for the Park over the longer term, especially as the LLDC in its role as a development corporation is not a permanent organisation.

6.4 What new transport links and accessibility improvements have been implemented in support of the Games and Olympic Park (and what benefits have these delivered for current and future residents and visitors)?

Accessibility, and particularly access to opportunities and services, is a critical driver of regeneration. Therefore, ensuring that the Olympic Park and the area immediately surrounding it was easily accessible both during Games-time and in legacy was of central importance. It was a challenge made all the more difficult by a site that was largely inaccessible due to both the lack of transport infrastructure and the nature of the land uses currently on the site. In answering this research question the aim is to provide an overview of what has been done to improve accessibility, both in, around and through the Olympic Park, but also more generally in to and out of East London.

The answer draws on an evidence base that is founded on robust data about what has been delivered on the ground and the benefit(s) for current and future residents of and visitors to East London.

(i) The provision of new transport links and accessibility improvements

It is apparent through the evidence available that a number of new transport links and accessibility improvements were delivered in East London as a direct result of the 2012 Games. While the role played by the Games has largely been a catalytic one, helping to bring forward or unlock planned investments for facilities and infrastructure to be in operation in time for the Games, there were some new additional investments that would not have happened in the absence of the Games.

Taking these two groups in turn, the investments brought forward or unlocked as a result of the Games include:

- A £125 million project to double the capacity of Stratford Regional Station from 37,000 commuters during the morning peak in 2008 to an expected 83,000 during the morning peak in 2016. The work includes nine new lifts, eight new staircases, a re-opened subway, new platforms, wider, longer and clearer platforms and a new station entrance and ticket hall;^{256,257}
- Upgrades to the Docklands Light Railway (DLR), including expansions to the network from Canning Town to Stratford International, and from East India and Blackwall to Woolwich Arsenal; increasing the number of rail cars from two to three and boosting on-board capacity by 50%; lift upgrades at key stations; and a more frequent service in part driven by improvements to busy junctions on the network;^{258, 259}
- Upgrades to the North London Line, including new signals, extra tracks and longer platforms which enable four-car, rather than three-car, trains to operate and therefore significantly boost capacity;²⁶⁰
- The conversion of the North London Line to DLR operation between North Woolwich and Stratford; infrastructure upgrades at Blackwall and East India stations; modifications between Poplar and Woolwich Arsenal; and increased station capacity at Prince Regent (to serve the ExCeL exhibition centre).

In terms of new, additional investments, these include:

²⁵⁶ Olympic Delivery Authority (2008) *Transport Update Issue 2: Transport for 2012 and beyond*

²⁵⁷ Transport for London (2012) *Travel in London Report 5*

²⁵⁸ Olympic Delivery Authority (2008) *Transport Update Issue 2: Transport for 2012 and beyond*

²⁵⁹ Transport for London (2012) *Travel in London Report 5*

²⁶⁰ Olympic Delivery Authority (2008) *Transport Update Issue 2: Transport for 2012 and beyond*

- Upgrade of West Ham London Underground station, including the construction of a temporary walkway to help with the high number of spectators travelling to the Olympic Park;²⁶¹
- A cable car between the Royal Docks and Greenwich Peninsula with a journey time of five minutes and the potential to carry up to 2,500 people in each direction per hour.²⁶²

In addition, and as a direct result of the need to open up the site of the Olympic Park for the Games, a number of new connections were created in and around the Olympic Park. These connections will also significantly improve accessibility to the new parklands, neighbourhoods and venues that will exist in legacy and as such are an important element in the regeneration of this part of East London: "[transforming] one of the poorest connected areas into one of the best"²⁶³.

In total, over 30 bridges and connections were built for use during and after the Games, spanning the rivers and railway lines running through the Olympic Park. They have also been built with legacy in mind (with temporary elements incorporated to cater for increased spectator use).²⁶⁴ The following bridges and connections are of particular note:

- A major footbridge from Stratford Station into the centre of the Olympic Park spanning the Olympic Park Loop Road, part of the Aquatics Centre, the River Lea and a railway line. This bridge will continue to provide the main pedestrian route to and from the Park, ensuring that residents can easily access the residential areas, the sporting facilities and the transport links and shops at Stratford.
- Two permanent bridges in the centre of the Park spanning the North London Line and Carpenters Road, creating an essential link between the north and south of the Park. The bridge is the main pedestrian walkway through the middle of the Park.
- The creation of an Olympic Park Loop Road, 12km of road surrounding the Olympic Park site (including an underpass under the A12). The loop road links every venue on the Park with the Village and will link to other developments being brought forward in legacy.
- A new bridge on Angel Lane providing new links for cyclists, pedestrians and motorists and significantly opening up access to the Park.

(ii) The benefits of improved accessibility and transport links

In some ways the true benefit of the improved accessibility will not be fully identifiable for a number of years (post 2015 at the earliest), at least until the Park re-opens, people are living in the new neighbourhoods and the venues are being regularly accessed. In other ways, East London residents are already benefiting from the public transport improvements on a daily basis and will continue to do so for many years to come. Transport for London note that the permanent nature of the enhancements to the transport network mean that they "*form a vital part of the wider games Legacy*" as they significantly improve "*transport capacity and reliability*" in East London, and will do so "*for many years to come*".²⁶⁵

One benefit of these improvements in transport infrastructure, which can be assessed in the interim, is the role they can play in improving accessibility to public transport. Using TfL's Public Transport Accessibility Level (PTAL) data, it is possible to understand the impacts of these improvements in transport provision. The following three illustrative diagrams show the levels of accessibility to public transport in the immediate vicinity of the Olympic Park, centred on a point just to the west of Stratford International Station.²⁶⁶ Visually these maps show how the transport improvements, including those still to be fully realised (i.e. those that improve accessibility throughout the Olympic Park), result in some locations around the Olympic Park increasing from PTAL level 0 (effectively zero access to public transport within the specified

²⁶¹ Olympic Delivery Authority (2011) *Transport Big Build – Complete*

²⁶² <http://www.london.gov.uk/priorities/transport/investing-transport/making-better-use-river-transport/cable-car>

²⁶³ Olympic Delivery Authority (2011) *Transform – Building the Olympic Park 2005-2011*

²⁶⁴ *Ibid*

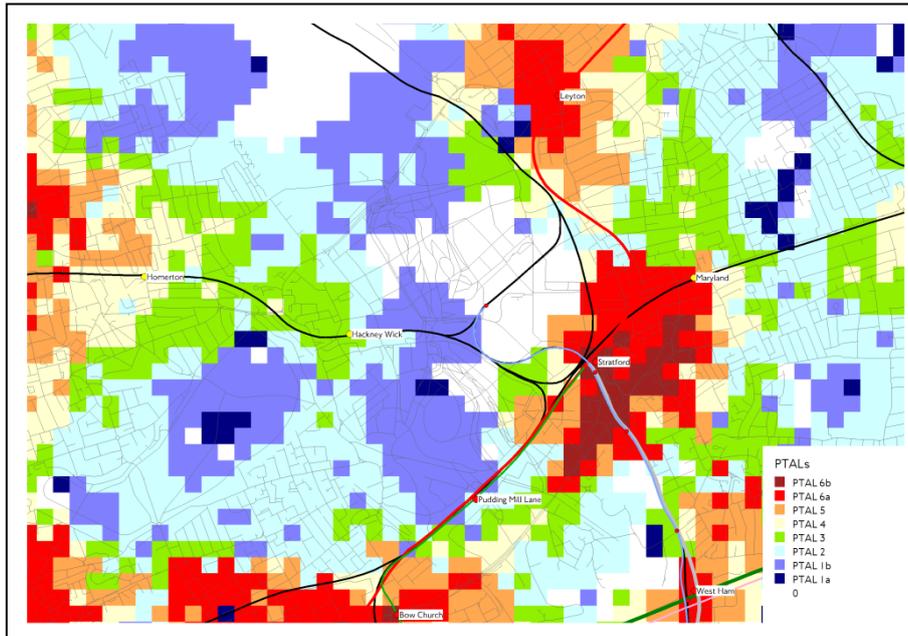
²⁶⁵ Transport for London (2013) *Travel in London Report 5*

²⁶⁶ Transport for London (2011) *Travel in London Report 4*

criteria and illustrated by the white areas on the map) to the highest PTAL value of 6 (a high level of accessibility) by 2014 (illustrated by the dark red area).²⁶⁷

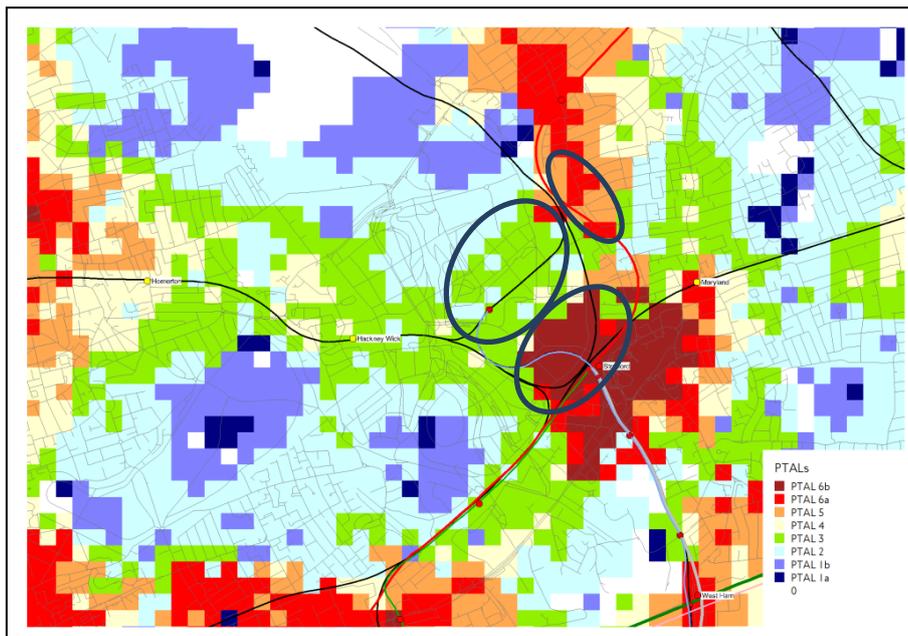
More specifically, between 2010 (Figure 6-1) and 2012-2014 (Figure 6-2), significant change in the PTAL scores will be notable in three areas, as indicated by the three blue rings in Figure 6-2. These improvements will be largely driven by the improvements to Stratford Station (the increase in dark red shading) and the impact of the redevelopment of the site into the Olympic Park which will significantly improve accessibility to public transport (the change from the white shaded area to the green, and the change from light red shaded area to red).

Figure 6-1: Accessibility to public transport in the vicinity of the Olympic Park – Pre-Games 2010



Source: Transport for London

Figure 6-2: Accessibility to public transport in the vicinity of the Olympic Park – Post-Games Transformation 2012-2014 onwards

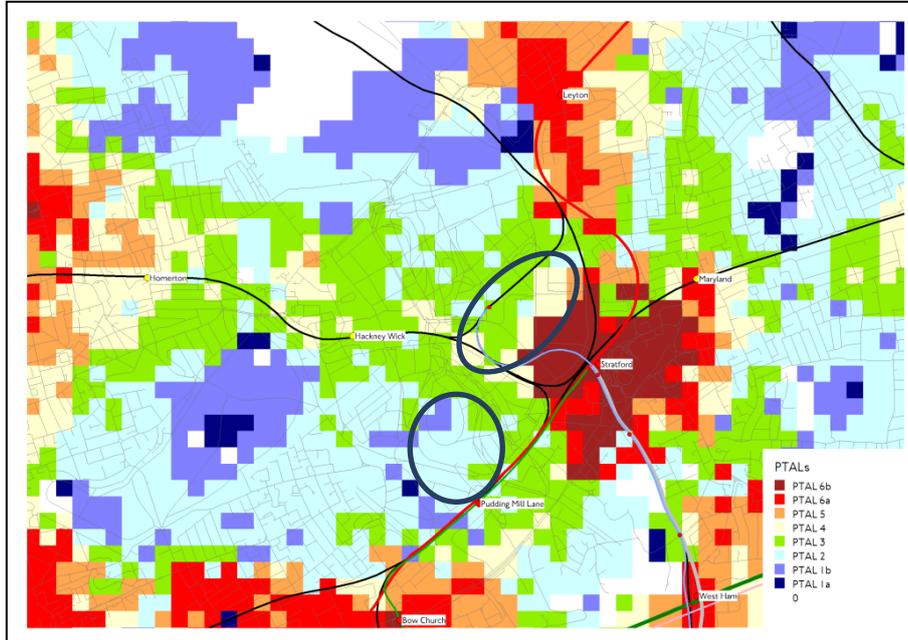


Source: Transport for London

²⁶⁷ Transport for London (2011) *Travel in London Report 4*

Between 2012 and 2014 (Figure 6-2) and post-2014 (Figure 6-3), the changes are less significant and are primarily related to the further 'opening up' (including entrances, exits and pedestrian routes) and accessibility improvements resulting from the transformation of the Olympic Park (the change from green shading to pink, and from blue shading to light blue).

Figure 6-3: Accessibility to public transport in the vicinity of the Olympic Park – Post Legacy Activities 2014 onwards



Source: Transport for London.

However, given the expected timings of these benefits, East London residents have yet to fully realised them. The results of a survey of 1,320 East London residents across the six host boroughs in early 2012 found that while 87% of respondents 'agreed' that their "neighbourhood has reliable transport links" only 43% felt that improvement to public transport had already been one of the positive impacts of the 2012 Games (although, it should be noted that this was the third highest after shopping facilities (48%) and improving the image of the local area (48%)); while half of the respondents felt that increased transport congestion was a negative impact arising out of the preparation for the Games and that it was one that would remain over the longer term.

One explanation for these survey results may be the fact that at the time of the survey (February to April 2012), residents were yet to feel the benefits of the improved accessibility in and around the Olympic Park. Also, at the time they were asked they were of the opinion that the Games *were* going to cause significant issues and congestion on the transport network – a problem that did not materialise to the extent that many had anticipated.

Transforming communities

6.5 How were the plans for the Olympic Park and the surrounding area (including the Legacy Masterplan Framework) developed in conjunction with the local community, and to what extent did they reflect the needs and aspirations of different groups?

The plans for the Olympic Park and the surrounding area have been supported by a series of strategic documents that guided, influenced and shaped the subsequent activities on the ground. This included three Olympic and post-Games legacy master plans:²⁶⁸

- The 2004 initial master plan which was developed to support the London 2012 bid and underpin the compulsory purchase of the land required. This bid plan was accompanied by a master plan showing the proposed regeneration proposals for the site if the bid was unsuccessful;
- The 2006 master plan which merged the Games and Stratford City master plans to "*achieve efficiency in development funding, construction logistics and operational management as well as enhance legacy benefits*".²⁶⁹ In particular, this plan presented the major residential component of the Stratford City proposal as the Olympic Village. This master plan formed the basis of the eventual planning permissions for the Olympic, Paralympic and legacy transformation master plans;
- The final revised master plan (2007) which covered Games-time, transformation and legacy. This master plan sought to enhance "*legacy benefits further, adopt more sustainable approaches and improve deliverability*".²⁷⁰ The revised master plan proposals also refined the Games infrastructure to provide the "*best solution to support legacy development and minimize [the] transformation required to deliver a more efficient master plan*".²⁷¹

Throughout the development of each of these master plans, there was a desire to engage and involve the local community. The important question for the meta-evaluation is the extent to which these plans were actually developed in conjunction with the local community and the extent to which they reflected the needs and aspirations of different groups. Unfortunately, no formal evaluation of the community engagement activities was undertaken. Therefore, it is necessary to piece together an answer by drawing on a range of different evidence sources, including a residents survey, resident focus groups, stakeholder consultations and other documentation.

(i) A large scale engagement process

It is apparent through a research paper by the Institution of Civil Engineers (ICE), 'Delivering London 2012: master planning'²⁷² that the scale of community engagement around the plans for the Olympic Park was significant, as it notes that the 'initial master plan' in 2004 was shaped by "*over 500,000 questionnaires*" and "*70 public consultation events held in an around the Lower Lea Valley*" with the intention being to "*ensure that the overall master plan was tuned to local conditions and needs while still meeting regional requirements and the specific demands of the IOC in terms of transport, sustainability, security, environmental issues and legacy benefits*".²⁷³

The scale of the engagement exercise is also somewhat reflected in the results of the Host Boroughs Resident Survey commissioned as part of the meta-evaluation which found that just under half of the respondents (45%) had heard about the plans to improve the Olympic Park and the surrounding area a 'great deal' or a 'fair amount', although, only a quarter (23%) of

²⁶⁸ Institution of Civil Engineers (2011) *Delivering London 2012: parklands and waterways*. Published in Civil Engineering 164

²⁶⁹ *Ibid*

²⁷⁰ *Ibid*

²⁷¹ *Ibid*

²⁷² *Ibid*

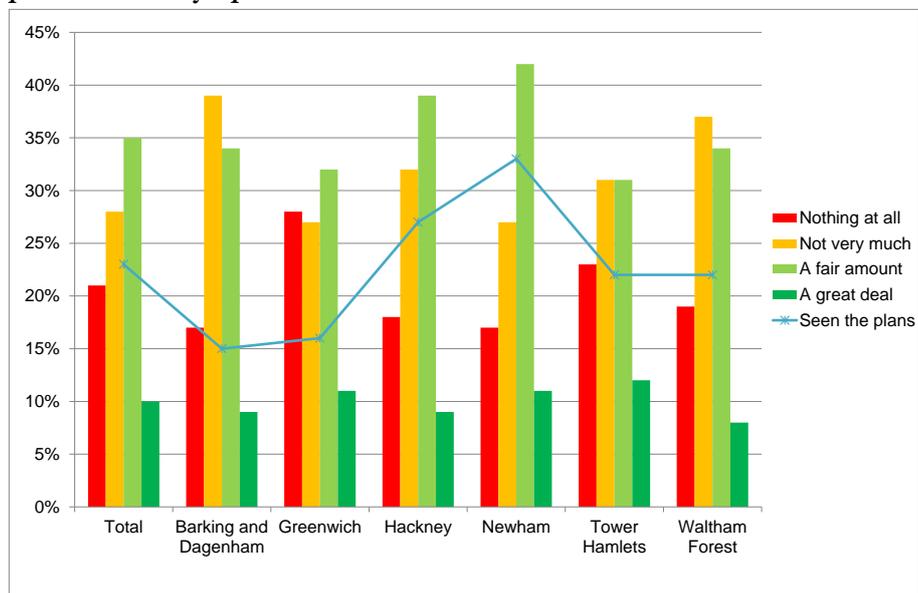
²⁷³ *Ibid*

respondents had actually seen the plans to improve the Olympic Park area. Importantly, only a fifth of respondents (21%) had heard 'nothing at all'.

A larger proportion of respondents in Newham had seen the plans to improve the Olympic Park area (33%) than those who lived in Barking and Dagenham (15%) or Greenwich (16%). In addition, 53% of the respondent who live in Newham had heard a 'great deal/a fair amount' about the plans compared to 43% in both Barking and Dagenham and Greenwich. These findings are partly explained by the proximity of the boroughs to the Park, with residents in the closer borough of Newham more likely to have heard about the plans, but they may also reflect the amount of supplementary engagement work carried out by individual boroughs (Figure 6-4).

The scale of the engagement activity is however only one element. Another, and perhaps more important element, is the extent to which the community felt they were able to influence the plans and the extent to which they are satisfied with the plans.

Figure 6-4: The extent to which respondents that had heard about – and seen – the plans of the Olympic Park



Source: Olympic and Paralympic Host Borough Survey

(ii) Ability to influence

Through the focus groups with adults and young people in the four boroughs surrounding the Olympic Park, it was apparent that while there were opportunities to engage in the planning processes around the Park, there was generally little interest from the community until the development began and buildings started going up. It was also noted that in terms of planning for the Games the engagement and consultation process felt like it was more about information sharing than meaningful consultation. This lack of influence was felt by some members of one of the groups to have significantly reduced the motivation of some to get involved as they simply gave up trying to influence the shape and nature of the Park. This view was also supported through the consultations undertaken as part of the meta-evaluation with consultees noting that due to the nature of Games and the development required the engagement with the community was 'more communication than consultation' and that it had eroded some of the consultation good practice used previously.

However, it was also noted that this situation was not the case with the legacy plans. The LLDC has sought to actively involve the community and to provide them with opportunities to influence the plans for the Park through three broad types of activity:

- Consultation – formal consultation exercises including planning for real with different age groups and backgrounds;

- Communication – including residents meetings, written communications, the Olympic Park Engagement Network and a 24 hour hotline; it is a suite of activity which is guided by the principle of trying to be 'the best neighbour they can be';
- Community outreach – including proactive engagement, connecting people into local provision, sports projects on the local estates and pocket parks.

This activity has been guided by five engagement objectives²⁷⁴:

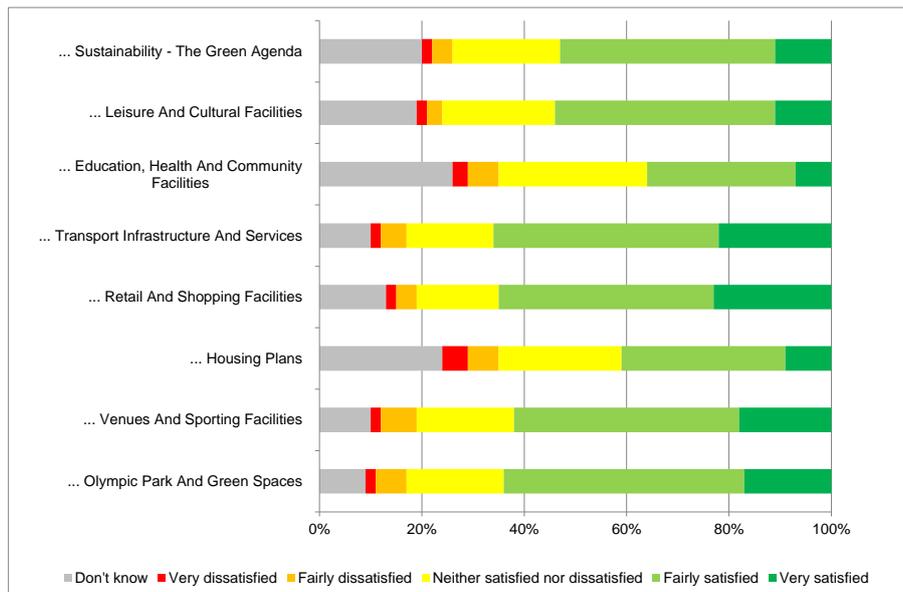
- Develop a local sense of ownership and responsibility;
- Support successful community initiatives;
- Establish clear communication and information sharing;
- Enhance corporation social responsibility (internally and externally); and
- Develop strong relationship and lasting partnerships.

(iii) Satisfaction with the plans

In trying to assess the extent to which the plans for the Park reflected the needs and aspirations of different groups, the best proxy measure available is the extent to which the community were satisfied with the consultation process and more importantly with the plans themselves. These issues were explored through the Host Borough Resident Survey. The survey found that a quarter (23%) of the respondents were satisfied with the community consultation process on the plans for the Olympic Park and surrounding area and the opportunity to input their views, with 18% dissatisfied and 37% neither satisfied nor dissatisfied. The proportion of satisfied respondents rises to 40% for those who live in Newham and falls to 15% for those who live in Barking and Dagenham.

In terms of specifics, of those respondents who had seen the plans over half of them were satisfied with the plans for sustainability (53%), venues and sporting facilities (62%), retail and shopping facilities (65%), transport infrastructure and services (65%), leisure and cultural facilities (54%) and the Olympic Park and green spaces (64%). Less than 10% of respondents were dissatisfied with any aspects of the plans. Only 30% of respondents were satisfied with the plans for education, health and community facilities and 36% were satisfied with the plans for housing, a finding that is consistent with respondent's views on the extent to which the 2012 Games will impact on these facilities in the local area (Figure 6-5).

²⁷⁴ London Legacy Development Corporation (2012) *Community Engagement Policy*

Figure 6-5: Satisfaction with the plans for the Olympic Park and surrounding area after the Games

Source: *Olympic and Paralympic Host Boroughs Resident Survey*

6.6 To what extent have accessible new homes and leisure, education, health and community facilities been provided in and around the Olympic Park as a consequence of the Games, and to what extent are local people actively making use of the new facilities provided?

In one sense it is simply too early to answer this research question as the new homes, leisure, education, health and community facilities are only just being built. Therefore, it may not be possible to provide a full answer to this question for at least 10 years. However, drawing on a range of evidence sources, including details of the proposed transformation activity and plans for legacy as well as the Host Boroughs Resident Survey, it is possible to point forward and to provide a sense of the likely direction of travel and scale of benefits that will emerge over time.

(i) New Homes

In terms of new homes, the LLDC is planning to create 6,870 new homes of which of which 35% will be affordable and 42% family homes. The conversion of the Athletes' Village will result in the delivery of a further 2,818 additional apartments and town houses, 48% of which will be affordable. The homes in the Athletes' Village will begin to be occupied from mid-to-late 2013, while the first LLDC homes will begin to be occupied from 2014.

(ii) New leisure facilities

There are three broad types of leisure facility being created. The first is the sports venues themselves which will provide the area with venues for major sport and others events (e.g. music concerts), a swimming pool, a velo park, a tennis centre and hockey pitches. The second is Westfield, which offers the community easy access to one of Europe's largest shopping centres. The third is the Park itself, which will offer 102 hectares of open space and 45 hectares of bio diverse habitat.

(iii) New education facilities

The Park itself will be home to two primary schools, one secondary school and nine nurseries. Alongside this, the University of East London and Birkbeck are opening a new campus in Stratford's cultural quarter in the autumn of 2013 and Loughborough University will open a campus in the converted broadcast centre (iCITY).

(iv) New health facilities

The Park will also be home to three health centres, one of which is the conversion of the Athletes Health centre, and alongside the conversion of the Athletes' Village into new homes will form part of the first community on the Park: East Village.

(v) New community facilities

Throughout the Park, and in addition to a number of the developments noted above, many of which will provide community uses, a number of multi-purpose community spaces will also be created.

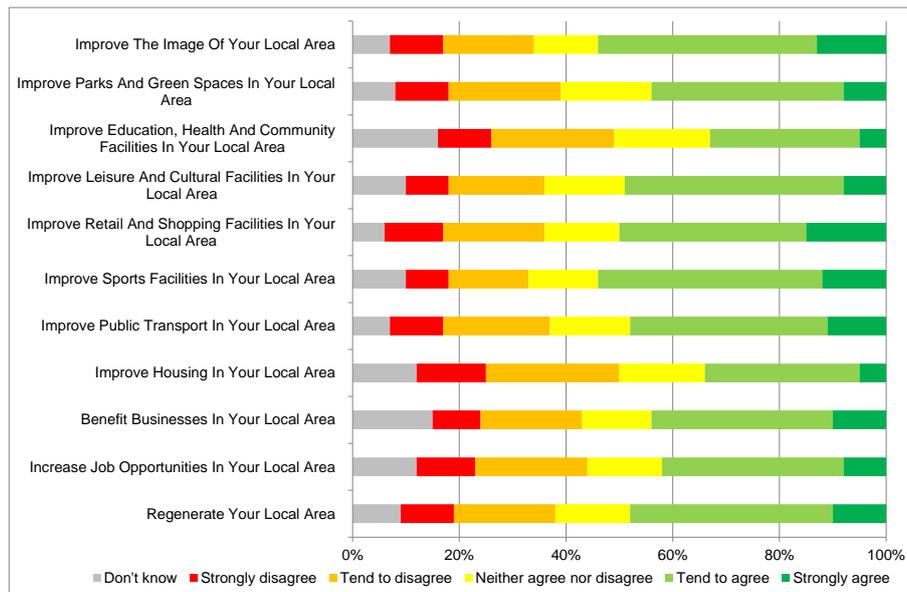
(vi) Community use

Together these facilities and the Park itself are expected to attract millions of visitors and participants. The LLDC's target outputs include the following:

- 2.1 million visits to the Park (excluding venues) per annum;
- 2 million visits to the stadium per annum;
- 800,000 visits to the ArcelorMittal Orbit per annum;
- 700,000 visits to the Aquatics Centre per annum;
- 500,000 visits to the Copper Box per annum;
- Over 1,000 participants or spectators at the One Movement community sports festival; and
- 1,650 participants and spectators at the six host borough community swimming gala.

It is also apparent through the Host Boroughs Resident Survey that local people are looking forward to benefiting from the transformation of the Olympic Park. When asked about the extent to which the Games will positively impact on the area over the longer term, two of the top three answers related to new and improved facilities including: sports (54% of respondents) and retail and shopping (50%) (Figure 6-60).

However, the converse of this positive finding was that there were only two factors where more respondents to this question disagreed than agreed and these were the extent to which the Games will improve housing in the local area (38% thought that it wouldn't compared to 34% who thought that it would) and the extent to which it will improve education, health and community facilities (where the same proportion of respondents at 33%, thought that it wouldn't as those who thought that it would).

Figure 6-6: The extent to which the 2012 Games will positively impact – over the longer term – on the local area

Source: *Olympic and Paralympic Host Boroughs Resident Survey*

These results may in part be due to the fact that at the time of the survey (February to April 2012), the improvements to retail and sports facilities were already tangible (Westfield was open and the sports facilities were visible even if not yet accessible), whereas the housing, education, health and community facilities were simply plans.

6.7 What has been the impact of the Park and venues on the recreational habits of East London residents, and their awareness of biodiversity?

The evidence to answer this research question is very limited. In part this is due to timing, as it is not possible at this early stage to know how the Park and venues will impact on the recreational habits of East London residents and their awareness of biodiversity.

Prior to the Games starting, 29% of respondents to the Host Boroughs Resident Survey were aware that the 2012 Games were aiming to be the greenest ever. Of those who knew about this aim, three-quarters (78%) said that the Games had not caused them to change their behaviors with regard to sustainability, with the 21% for whom it had prompted a change noting that it had prompted them to:

- Increase recycling – 10%;
- Protect their local environment – 10%;
- Conserve water/reduce water wastage – 7%;
- Improve environmental friendly transport behaviour – 7%;
- Reduce energy consumption – 4%;
- Change their attitudes to sustainability – 3%.

In terms of bio-diversity, while there is no evidence around resident awareness, what is apparent is that the changes the Olympic Park will offer new bio-diverse habitat, guided by the Olympic Park Biodiversity Action Plan²⁷⁵, this will include the:

- Creation of 100 hectares of greenspace including 45 hectares of bio diverse habitat;
- Planting of 4,000 semi-mature trees;

²⁷⁵ Olympic Delivery Authority (no date) *Delivering the Olympic Park Biodiversity Action Plan*

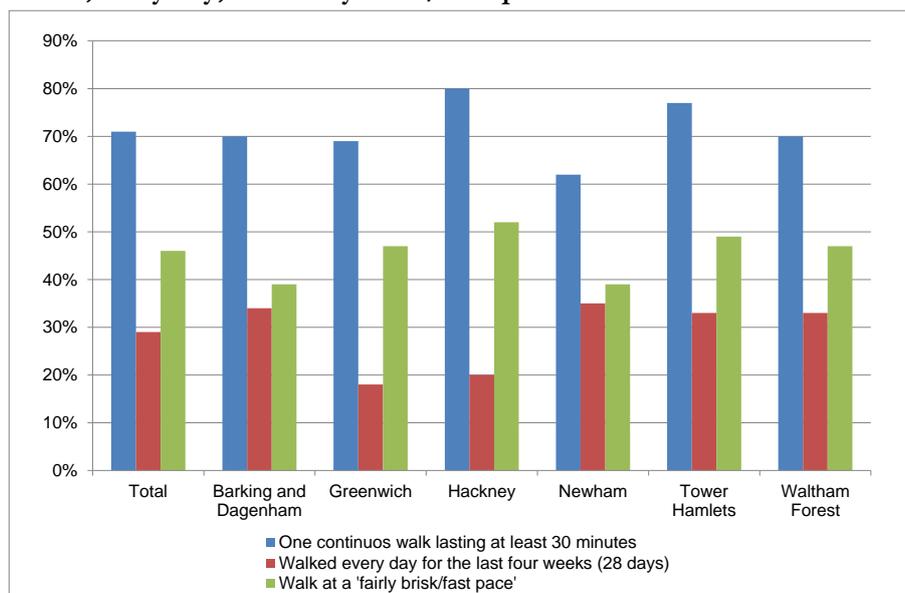
- Creation of seamless parkland and restored waterways;
- Eradication of invasive weed;
- Relocation of habitats and 28 species or species groups including plants, invertebrates, fish, amphibians, reptiles, birds and mammals; and
- Creation of perennial meadows.

In terms of the recreational habits of East London residents, again it is too early to know how the Park and venues have impacted on these as at the time of writing it was closed to the public. However, the Host Boroughs Resident Survey does provide a useful baseline in terms of the current recreational habits of East London residents.

The survey found that nearly three-quarters (71%) of the respondents had done at least one continuous walk lasting at least 30 minutes in the last four weeks, with respondents living in Hackney more likely (80%) to have done so than those living in Newham (62%). Those who had actively engaged with the Games were also more likely (81%) than those who have not (66%) (Figure 6-7).

Of those respondents that had done at least one continuous walk lasting at least 30 minutes, 29% had done so every day of the last four weeks, 13% of whom said that they did so for health reasons. Nearly half (46%) said that they walked at a 'fairly brisk/fast pace' with the remainder (44%) walking at a 'steady average pace'.

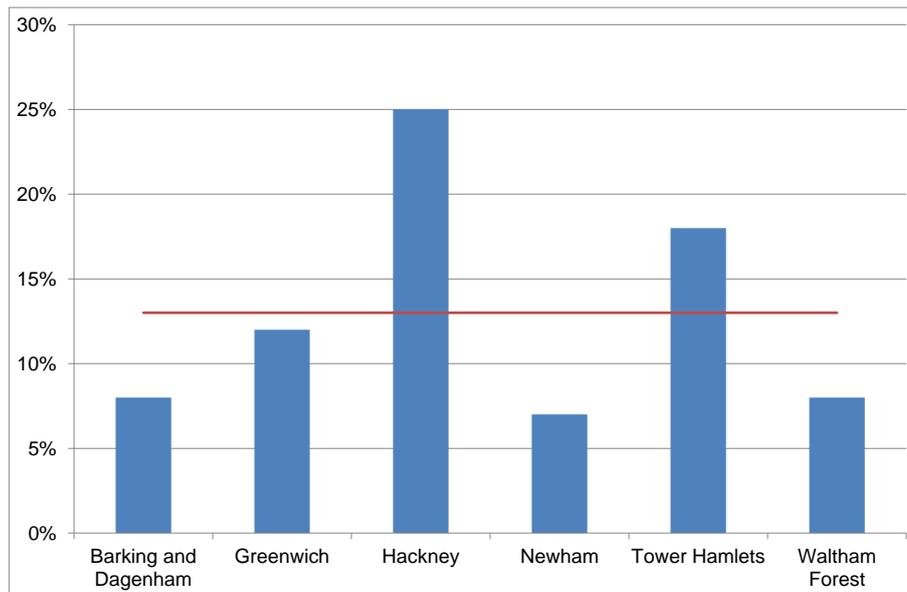
Figure 6-7: Proportion of respondents that had walked for 30 minutes: in the last four weeks; every day; at a 'fairly brisk/fast' pace



Source: Olympic and Paralympic Host Boroughs Resident Survey

Thirteen per cent of respondents had done a least one continuous cycle ride lasting at least 30 minutes in the last four weeks. This figure rose to 20% for those in the 25 to 44 age bracket and to 25% for those living in Hackney. This was in stark contrast to only 7% of respondents who lived in Newham and 8% of respondents who lived in Barking and Dagenham and Waltham Forest. Again, those who had actively engaged with the Games were also more likely (20%) to have cycled for at least 30 minutes in the last four weeks than those who have not (10%) (Figure 6-8).

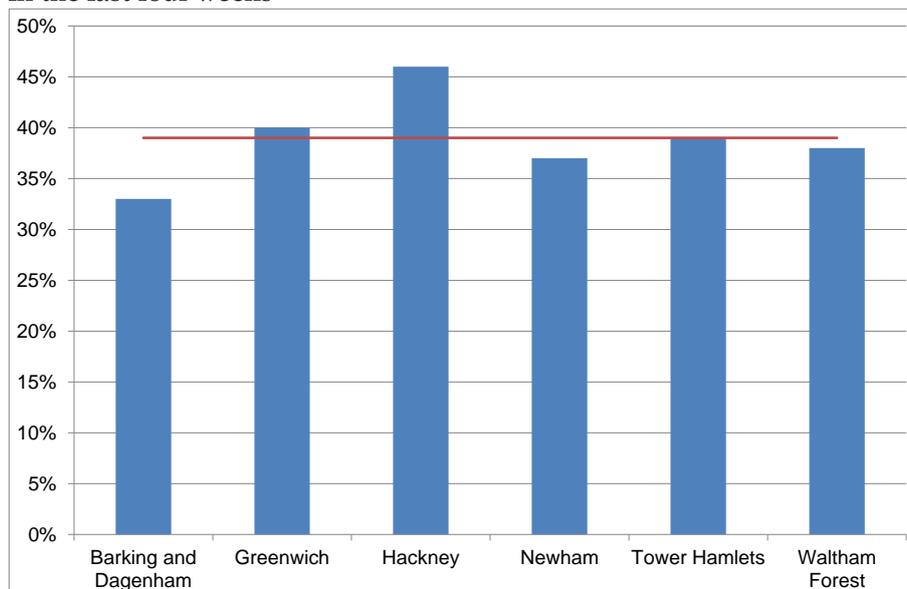
Figure 6-8: Proportion of respondents that had cycled for 30 minutes in the last four weeks



Source: Olympic and Paralympic Host Boroughs Resident Survey
 Note: Red line shows the total for all respondents

A third of respondents (39%) had also done some other sporting or active recreation activities in the last four weeks, with men (47%) more likely to have done so than women (31%) and those aged 16-24 (56%) more likely than those in older age brackets (25-44 – 43%; 45-64 – 30%; 65-74 – 18%; and 75+ – 13%). Hackney was again the most 'active' of the host boroughs with 46% of the respondents who lived there noting that that had done other sporting or active recreation activities. Those actively engaged with the Games were also more likely 53% compared to 33% of those who have not had any engagement with the Games (Figure 6-9).

Figure 6-9: Proportion of respondents that had done some sporting or active recreation in the last four weeks



Source: Olympic and Paralympic Host Boroughs Resident Survey
 Note: Red line shows the total for all respondents

The most common sports participated in within the *last year* were:

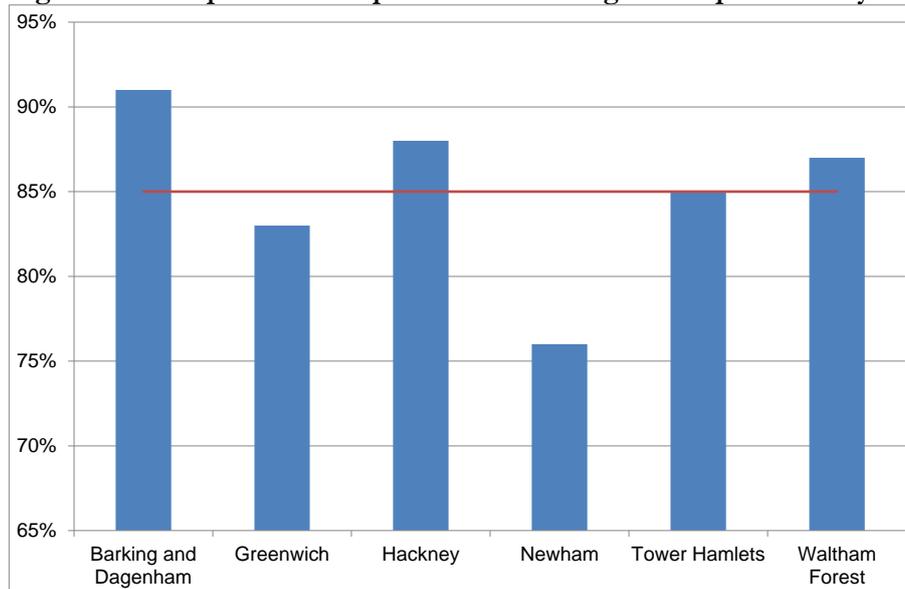
- Swimming or diving (indoors) – 23%;
- Health, fitness, gym or conditioning activities – 31%;

- Cycling – 12%;
- Football (including 5-a-side and 6-a-side) – 12%;
- Jogging, cross country and road running –12%; and
- Keep-fit, aerobics and dance exercise (including exercise bikes) – 9%.

Taking these findings together (i.e. walking, cycling and other sporting or active recreation), a total of 51% of respondents had done some form of active sport in the last four weeks, 83% of whom said that it was enough to raise their breathing rate.

Eighty-five per cent of respondents cited that they can get to a sports facility within 20 minutes (either by walking or some other form of transport). This figure did however vary across the host boroughs with 91% of respondents in Barking and Dagenham stating that this was the case, compared to only 76% in Newham (Figure 6-10).

Figure 6-10: Proportion of respondents that can get to a sports facility within 20 minutes



Source: Olympic and Paralympic Host Boroughs Resident Survey

Note: Red line shows the total for all respondents

6.8 How has the transformation of the Olympic Park and the surrounding area contributed to community cohesion, and what are the key lessons for the integration of existing communities?

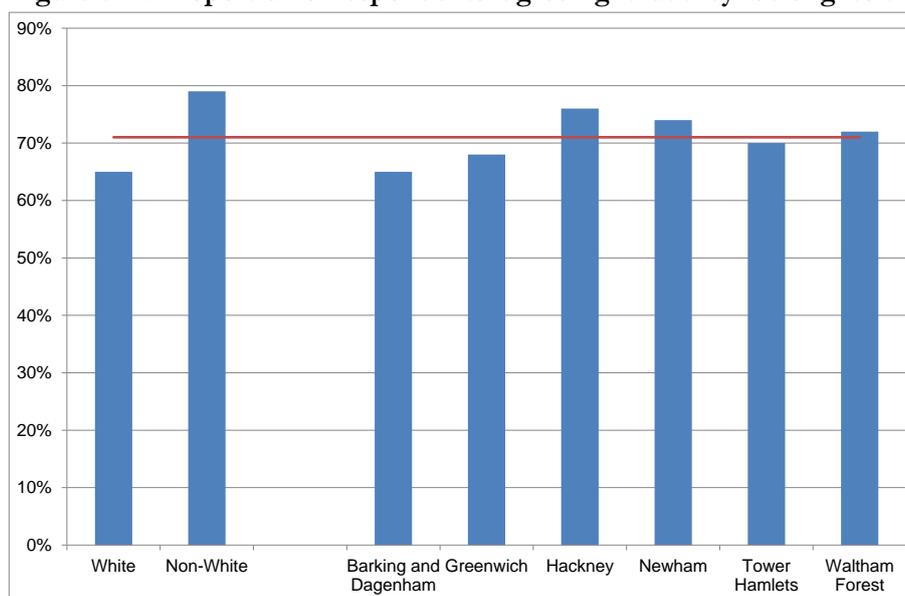
Community cohesion, and the sense to which people from different ethnic and socio-economic backgrounds get on with one another, is an issue that is of particular importance to East London given the scale of the transformation expected on and around the Olympic Park. With thousands of new homes planned for the area and many thousands of new residents arriving, the extent to which these new communities can integrate with the existing communities is centrally important to delivering a successful and lasting legacy.

A comprehensive answer to this research question is not currently possible, not least because the new communities have yet to develop as residents have yet to move into the area. However, based on the evidence available it is possible to look at both the extent to which there is cohesion amongst the existing communities, the impact of the Games on this, and to look forward and identify some of the big issues that need to be considered in terms of integration.

The Host Boroughs Resident Survey is a particularly valuable source of evidence as it asked a number of key questions that are directly relevant to answering this question. The survey asked respondents whether they felt that they 'belonged' to their local area. Seventy-one percent said they did, a finding that was more true for non-white (79%) respondents than 'white'

respondents (65%), and across the six host boroughs the figures ranged from 76% in Hackney to 65% in Barking and Dagenham (Figure 6-11).

Figure 6-11: Proportion of respondents 'agreeing' that they 'belong' to the local area



Source: Olympic and Paralympic Host Boroughs Resident Survey

Note: Red line shows the total for all respondents

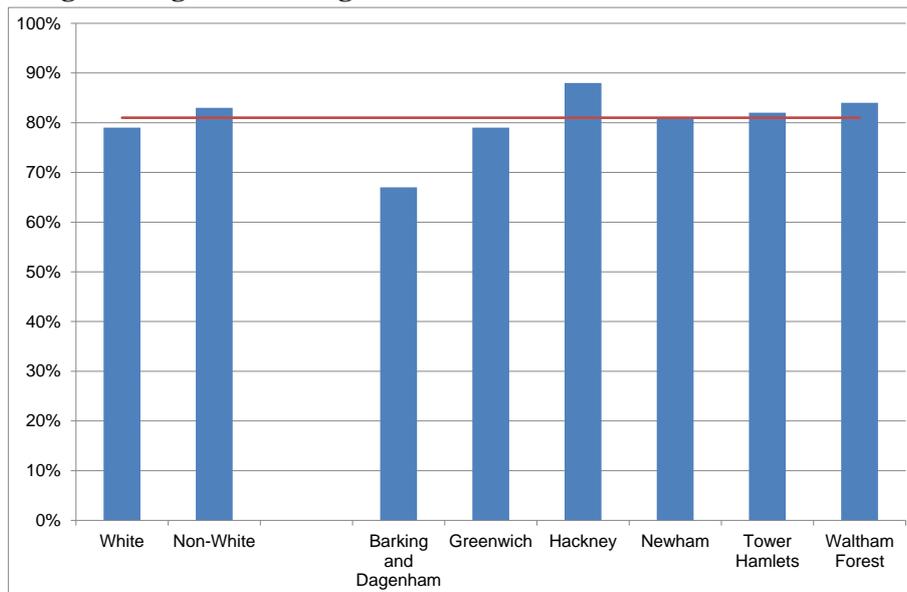
Eighty-one per cent of respondents agreed that their local area was a place where people from different backgrounds 'get on well together', a view that was supported by both the 'white' (79%) and non-white (83%) respondents alike. It is a finding that again compares favourably with the results of the DCLG 2008 Place Survey which found that 67% of host borough residents agreed that people from different backgrounds 'get on well together' (with a London average of 76%).²⁷⁶

However, there was again significant variation between the six host boroughs with a 21 percentage point difference between Hackney (the highest at 88%) and Barking and Dagenham (the lowest at 67%). This pattern was also apparent in the 2008 Place Survey where 49% of respondents in Barking and Dagenham and 77% of respondents in Hackney agreed that people from different backgrounds 'get on well together' (Figure 6-12).²⁷⁷

²⁷⁶ Department for Communities and Local Government (2008) *Place Survey*

²⁷⁷ *Ibid*

Figure 6-12: Proportion of respondents 'agreeing' that people from different backgrounds get on well together

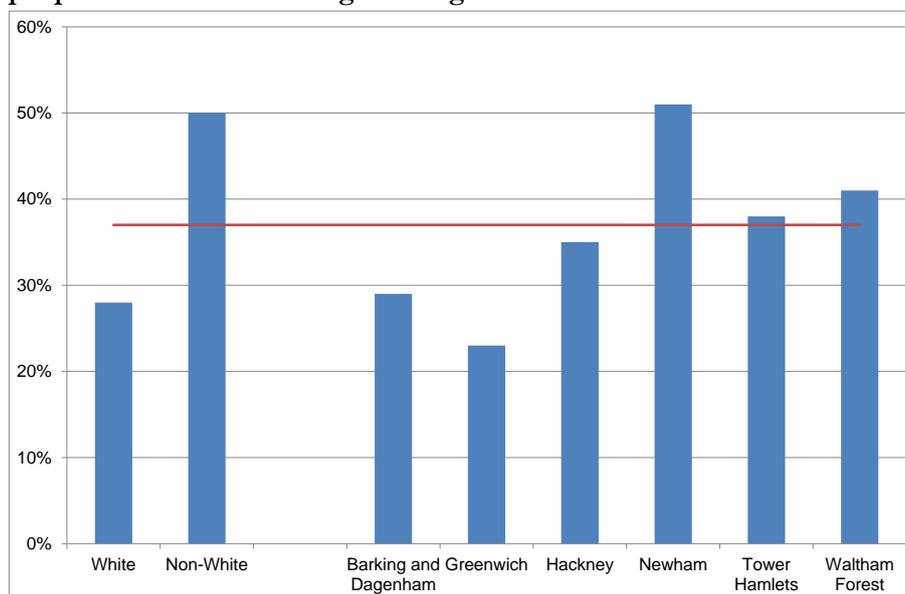


Source: Olympic and Paralympic Host Boroughs Resident Survey

Note: Red line shows the total for all respondents

Over a third (37%) of respondents agreed that the Games made people from different backgrounds in their local area get on better, while the same proportion disagreed. Again, there is a disparity of views across the host boroughs with respondents living in Newham more likely to agree (51%) and less likely to disagree (27%), as opposed to respondents living in Barking and Dagenham who were less likely to agree (29%) and more likely to disagree (49%) (Figure 6-13).

Figure 6-13: Proportion of respondents 'agreeing' that the 2012 Games have made people from different backgrounds get on better



Source: Olympic and Paralympic Host Boroughs Resident Survey

Note: Red line shows the total for all respondents

The two focus groups undertaken as part of the meta-evaluation provided further insight around community cohesion in East London. The over-arching view across both groups was that the Games had brought together the communities in East London. It was a coming together that had been facilitated by a number of provisions put in place as a result of the Games such as live sites and street parties. Community cohesion was also felt to have been

enhanced by the fact that diversity was so openly celebrated during the Games, which had the knock on effect of valuing diversity more within East London.

It was also noted that the Games helped to build connections between communities and different levels of authority, including the local mayors and councilors, as it enabled people to interact on a social and friendly level and to unite over a common event.

In terms of ongoing community cohesion, and particularly the sense to which the new communities moving into the Park will effectively integrate with the existing communities, a number of important issues emerged through the focus groups.

Positively, participants felt that the schools on the Park will play a vital role in mixing the old and the new communities, particularly because they will be made up from pupils who live both on and off the Park and as the children become friends this will encourage the adults to mix. The facilities on the Park were also seen as important in helping with integration. Linked to this, it was also noted that in addition to the showcase events on the Park there also needs to be a number of smaller local events as it is through these that the local communities are more likely to mix and integrate.

More negatively, there was some concern that if it is not managed carefully, there is potential for a divide to be created between the affluent Park residents and their surrounding areas, with the Park in effect becoming an island. It was suggested that the older properties which neighbor the park look dated and out of place and that the refurbishment and development of these could help prevent certain perceptions from developing. Linked to this it was also noted that the Park cannot just be an extension of Stratford and that it needs to blend in with all of the communities that surround it.

There was also a significant amount of debate amongst the participants of the adult group about the problem of gangs in the area and the potential problems that could arise from giving the Park its own postcode (E20) as different gangs seek to claim the territory. However, it was noted by others that giving the Park the same postcode as one of the surrounding areas (e.g. E15) would have still presented the same issues. Interestingly the participants of the young people's groups felt that the public access and the community networks which are in place to protect the Park dampen the fear of gangs taking over the area.

The need to ensure that the new communities moving on to the Park are connected into and integrated with the existing communities in the area was also identified as a vitally important issue by a number of the consultees spoken to as part of the meta-evaluation. A 'them and us' culture was seen as a significant risk. In order to ensure that this does not happen, consultees identified the need to:

- Breakdown some mental perceptions that the Park is an exclusive area, and that it is for the whole community;
- Ensure that there are both physical and social connections – not least that the edges of the park are blurred; and
- Ensure that the desire to integrate local communities translates across everything that happens on the Park from pricing to events to the layout of the housing.

Consultees held up Westfield as a positive example of integration between new and existing communities.

Transforming prospects

6.9 To what extent did the preparation for and staging of the 2012 Games create job opportunities for more local residents (including in particular disadvantaged and disabled residents), and how was this supported?

Given its scale and the nature of activities involved, the Games provided a real opportunity for East London to address the skills gaps and shortages that exist and in doing so tackle the high levels of worklessness (particularly long term unemployment) and benefit dependency. The underpinning rationale was that skilled employment is one of the primary routes out of deprivation and therefore, the preparation and staging of the Games was seen as an opportunity to help more people into sustainable employment or higher-skilled jobs (particularly those that are unemployed or long-term unemployed) through effective training provision, employment brokerage and contractual requirements on contractors.

In this, a key objective was to use the 2012 Games in East London as a hook to raise local people's aspirations by encouraging them to take advantage of both new and existing job opportunities, and by motivating young people through expanding local career options.

Drawing on a number of strong sources of evidence, it is possible to see that the preparation for and the staging of the 2012 Games did create a large number of job opportunities for local residents.

(i) Job opportunities arising from the preparation of the Games

The demolition and build of the Olympic Park and the building of the Athletes' Village together created a significant number of employment opportunities. The demolition and build of the Olympic Park created in excess of 29,750 employment opportunities²⁷⁸:

- 17.5% (5,241) of the workers were host borough residents;
- 10.2% (3,035) of the workers were previously unemployed;
- 4% (1,190) of the workers were women;
- 1.1% (327) of workers were disabled; and
- 15% (4,463) of the workers were BAME.

The building of the Athletes' Village created a further 16,584 employment opportunities²⁷⁹:

- 27.2% (4,507) of the workers were host borough residents;
- 10.5% (1,741) of the workers were previously unemployed;
- 2.7% (448) of the workers were women;
- 0.5% (83) of workers were disabled; and
- 13.3% (2,156) of the workers were BAME.

Alongside the demolition and build of the Olympic Park and over a similar time period Westfield, Stratford City was also built and opened in September 2011. Although it is not possible to attribute all of the employment created through the development and operation of Westfield to the Games, it is apparent through an economic impact study of Westfield that at the very least the Games ensured that these opportunities were realised between 5 and 7 years earlier than would have been the case had the Games not taken place in East London²⁸⁰.

²⁷⁸ Olympic Delivery Authority (2012) *Cumulative Olympic Park and Athletes Village contractor workforce totals April 2008 – December 2011*

²⁷⁹ *Ibid*

²⁸⁰ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

With regard to construction jobs, the economic impact study estimated that 20% of all construction jobs were in the East London area, which equated to between 5,000 and 5,400 jobs with associated construction earnings of between £105 million and £110 million²⁸¹. While of the 10,000 permanent jobs created to operate Westfield Stratford City, around 3,000 have gone to local unemployed Newham residents²⁸², a figure that is likely to be higher were data available for all six of the host boroughs.

(ii) Job opportunities arising from the staging of the Games

These employment levels were then further built on by LOCOG through its Games-time workforce and Games-time contractor workforce in roles such as catering and hospitality, cleaning, retail, event services and security, traffic management and logistics.

LOCOG's Games-time workforce was 8,300 strong, 23.5% (1,951) of whom were resident in the host boroughs and 55% (1,073) of whom were previously workless prior to their employment with LOCOG. Nine per cent (747) of total workforce (i.e. 8,300 and not necessarily resident in the host boroughs) had a disability, 40% (3,320) were BAME and 46% (3,818) were female.

LOCOG's Games-time contractor workforce was 100,000 strong, 21% (21,000) of whom were resident in the host boroughs and 34% (7,140) of whom were previously workless prior to their employment with LOCOG. Nine per cent (9,000) of the total workforce (i.e. 100,000 and not necessarily resident in the host boroughs) had a disability, 50% (50,000) were BAME and 41% (41,000) were female.

By looking in more detail at LOCOG data for its Games time contractor workforce, it is apparent that the proportion of host borough residents in particular roles and the proportion who were workless prior to their employment does vary between sector. As Figure 6-14 illustrates, in particular sectors such as catering and hospitality, cleaning and retail a significantly higher proportion of previously workless individuals found employment directly as a result of the Games.

Figure 6-14: LOCOG Games-time contract workforce – sector breakdown

Sector	% of workforce resident in host boroughs	% of workforce resident in the host boroughs who were previously workless prior to LOCOG employment
Catering & hospitality	23%	60%
Cleaning	27%	65%
Retail	21%	62%
Event services & security	27%	35%
Traffic management	44%	Not available
Logistics	23%	Not available

Source: London Organising Committee of the Olympic and Paralympic Games Employment & Skills and Games Time Recruitment Briefing Note

(iii) Local jobs for local people

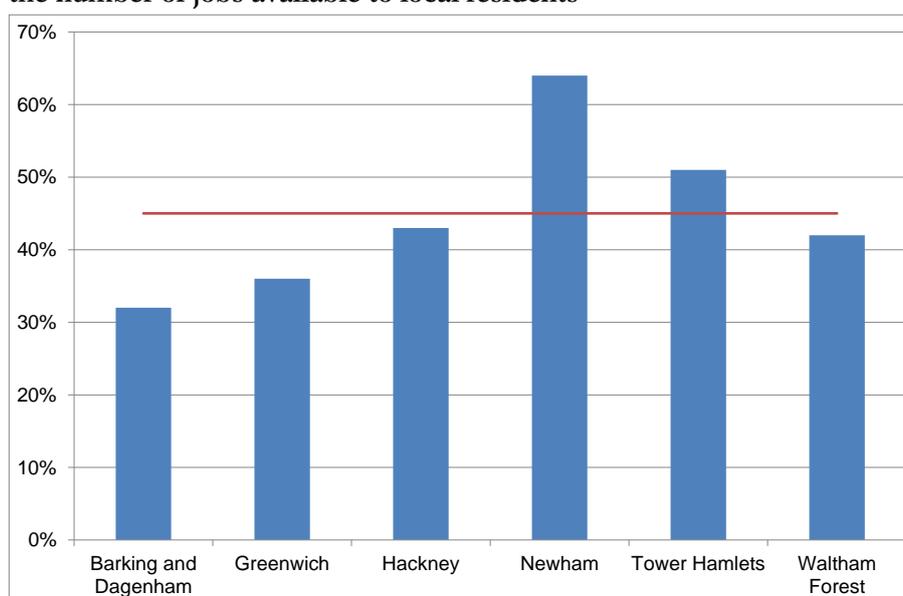
As can be seen above, a notable number of residents in the host boroughs found employment through the opportunities arising out of the Games. A further source of evidence that provides insight into the extent to which the host borough residents benefited from the employment opportunities arising out of the Games is the Host Boroughs Resident survey. This survey asked respondents a series of questions around the role the 2012 Games had played

²⁸¹ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

²⁸² London Borough of Newham

in providing access to jobs. Just under half (45%) of the respondents agreed that the hosting of the 2012 Games in East London had increased the number of jobs available to local residents, with 29% disagreeing. Interestingly, those respondents aged 16-24 were notably more likely to agree (60%) than those respondents in other age groups. Respondents who lived in Newham and Tower Hamlets were also more likely to agree (64% and 51% respectively) than those in Barking and Dagenham (32%) and Greenwich (36%) (Figure 6-15). This finding may in part be explained by the proximity to the Olympic Park and Westfield, Stratford City as these two developments provided significant job opportunities.

Figure 6-15: Proportion of respondents 'agreeing' that the 2012 Games have increased the number of jobs available to local residents



Source: Olympic and Paralympic Host Boroughs Resident Survey

Note: Red line shows the total for all respondents

That said, only 4% of respondents had directly (either personally (2%) or through members of their household(2%)) benefited from employment opportunities, lasting or due to last more than one year, resulting from the preparation of the Games: 2% on the Olympic Park; 1% in at Olympic venues and facilities; and 1% at Westfield, Stratford City.

Four per cent of respondents also noted that they had benefited (either personally (2%) or through a member of the household (2%) from employment opportunities related to the Games that have or are due to last for less than a year. Taken together these results suggest that 7% of respondents benefited, either personally (3%) or through someone in their household (4%), from employment opportunities related to the preparations for the 2012 Games.

The two focus groups undertaken as part of this meta-evaluation gave very different responses around the extent to which the Games had provided employment opportunities for East London residents. The adult group reported that no one they knew (friends or family) had worked on the Park, although they did know people who had worked in Westfield. They also called into question the definition of 'local' in terms of local people finding employment and questioned whether these 'local' workers had been living in the area 6 months prior to their employment. On the other hand, the young people talked passionately about their experiences, and the experiences of people they knew, of working in Games-times jobs and how these roles had helped them to gain valuable skills and experience, giving them the 'edge' in future job interviews.

(iv) Supporting people into employment

Ensuring that local people – particularly the long term unemployed – were able to benefit from the employment opportunities arising out of the preparation and staging of the Games have revolved around three broad types of activity.

The first is job brokerage and employer engagement activity, with perhaps the best example being the London Borough of Newham's job brokerage scheme and the Skills Place retail academy which delivered on a commitment from Westfield and its major retail anchors (John Lewis, Waitrose, Marks and Spencer and Vue cinema) to guarantee interview places for locally unemployed people living in Newham – something that was noted through the Economic Impact of Westfield Stratford City to be an example of "*much needed effective employer engagement*".²⁸³

The second is the delivery of programmes and activities specifically focused on supporting workless individuals to make them work ready and to find employment. The most significant of these were the activities within the London Employment and Skills Taskforce (LEST) 2012, which includes the Local Employment and Training Framework (LETF) and its successor the Six Host Borough Project. The evaluation of LEST 2012 in 2011 found that by March 2011 it had created a total of 6,090 jobs in the host boroughs, of which 1,909 were thought to be additional (i.e. would not have been created in the absence of the 2012 Games).²⁸⁴ In monetary terms this was translated into a net salary outcome of £27 million and a net GVA impact of £54 million between 2006/07 and 2010/11 for the host boroughs.

This positive finding was further supported by a subsequent evaluation, commissioned by the GLA, to look at the contribution of 2012 Games and associated labour market interventions and to build on the previous LEST evaluation by assessing activity from April 2011 to the end of 2012. This evaluation found that by December 2012 the Six Host Borough Project had created a total of 2,026 jobs, of which 696 were thought to be additional.²⁸⁵ In monetary terms this translated into a net salary outcome of £4.8 million and a net GVA impact of £10.13 million.

It is important to note that a proportion of the jobs identified through the two evaluations of LEST will be those jobs created as a direct result of the demolition and build of the Olympic Park, the building of the Athletes' Village, the delivery of the Games and the development and operation of Westfield. However, it is not possible to know exactly how many²⁸⁶ and therefore not possible to sum all the figures noted above due to the risk of double counting.

The third is the contractual requirements placed on development partners and contractors to ensure that a proportion of their workforce were local residents. These are requirements which the LLDC has maintained in its legacy work.

6.10 To what extent has the transformation of the Olympic Park, legacy venues and local image encouraged business investment in the Park and surrounding area, creating at least 8,000 jobs across a range of sectors (including in hi-tech and sport and leisure, tourism and cultural industries), and how was this supported?

Given the early stage at which the transformation of the Olympic Park and legacy venues is at, it is not currently possible to fully address this research question. In particular, there is no evidence available to comment on the extent to which the Park has created at least 8,000 jobs. However, what is possible in terms of the evidence currently available is to provide a sense of the direction of travel and to point forward towards the anticipated scale of impacts.

It is clear from the range of different evidence available and the consultations with relevant stakeholders that the ground work is being laid to encourage business investment in the Park and the surrounding area and that the Olympic Park as a 'hub' of employment is set to be significantly built on in legacy

The LLDC expect to create 4,421 jobs (excluding construction employment) on the Olympic Park in legacy through the range of employment space created along with the management of

²⁸³ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

²⁸⁴ Through the survey PwC and SQW calculated that LEST 2012 had an 'additionality ratio' of 0.31 in the Host Borough, this was marginally below the ratio for London as a whole of 0.32.

²⁸⁵ This was based on an additionality ratio of 0.34 which was very similar to the additionality of 0.32 that was used specifically for the Host Boroughs in the earlier LEST evaluation.

²⁸⁶ An issue also noted in the GLA Olympic Jobs Evaluation.

the venues and facilities (a significant proportion of which are likely to be in the sport, leisure and tourism sector). In addition, it is anticipated that the converted press and broadcast centres will support at least a further 4,000 jobs (a significant proportion of which will be in the hi-tech and cultural industries sectors). In fact, the converted press and broadcast centres (known as iCITY) lie at the heart of answering this research question as they will ultimately be central in determining the extent to which the Park becomes a successful business location.

iCITY is a Special Purpose Vehicle set up to create a legacy use for the press and broadcast centres. They have taken a long lease of the two buildings (and the area in between them) and their vision is to create a digital and creative district in this part of East London and a part of the wider London Tech City Initiative. iCITY has already secured three anchor tenants:

- BT Sport moved in in February 2013 to start their fit out and will begin broadcasting in summer 2013
- Loughborough University will create a new post-graduate research and executive education centre. Expected to open in 2015, the academic disciplines that will be based at iCITY are expected to include business and management, media and communications, digital technologies and sport (with a number of other subject areas being considered)²⁸⁷.
- Infinity will operate a state-of-the-art data centre of up to 260,000 square feet. It will be the UK's most advanced and environmentally friendly data centre supporting London's largest studios, innovation and research centres.²⁸⁸

Consultees noted that the press and broadcast centres are challenging structures to transform and successfully deliver in legacy, not least because of the challenges of transport and access given their location on the Park. However, consultees were confident that iCITY have appropriate measures and plans in place to create a viable legacy, and the number of strong tenancies already secured supports this confidence.

However, while iCITY is clearly of central importance in attracting business investment and creating employment opportunities it will certainly not be the only driver of business investment and employment creation in the area surrounding the Park. There are a number of other developments that also have the potential to play a significant role in attracting business investment and creating employment across the key sectors of hi-tech and sport and leisure, tourism and cultural industries. Focusing on two developments by way of example it is clear that:

- Lend Lease's investment in the further development of the Stratford City site – the International Quarter – which will provide 4 million sq ft of workspace, a new hotel, and 52,000 sq ft of shops and restaurants. Given its scale this development has the potential to create a significant amount of employment. Based on extremely conservative estimates²⁸⁹ this site has the potential to accommodate around 17,500 jobs; and
- Inter IKEA's investment in the development of the Strand East site which will provide 600,000 sq ft of commercial space (including flexible work and exhibition space for creative industries) and a 350 bed hotel. Again, it is a development that has the potential to create a significant amount of employment. Using the same conservative estimates²⁹⁰ this site has the potential to accommodate around 3,000 jobs.

²⁸⁷ See http://www.lboro.ac.uk/service/publicity/news-releases/2013/49_LIL.html and <http://www.lboro.ac.uk/london/>. Accessed 2 May 2013.

²⁸⁸ See <http://infinitysdc.net/2012/07/18/icity-preferred-bidder-status-for-olympic-press-and-broadcast-centres/>. Accessed 2 May 2013.

²⁸⁹ These estimates are based on the HCA's *Employment Densities Guide* (2nd Edition) 2010. With conservative assumptions made around the likely net internal area (assumed to be about 60% of the total area) and the likely levels of occupancy (assumed to be 80%).

²⁹⁰ *Ibid*

6.11 To what extent have training, work experience, and volunteer schemes associated with the 2012 Games contributed towards local people moving into employment beyond the Games?

The evidence available for answering this research question in terms of East London residents is limited.

For a number of the pan-London programmes delivered as part of LEST 2012, work experience and volunteering were key elements in the approach and integral to helping move workless Londoners into employment. One example of this is the Personal Best programme which used volunteering and the excitement generated by the opportunity to become a 2012 Games-time volunteer to improve the level of employability of London's workless population. Another example is the 2012 Games-related Sector Training Programme which involved the provision of training relevant to 2012 Games-related activities, with a particular focus on: customer service, media and communications, language and cultural awareness, and green skills. It is estimated that 5% of unemployed host borough beneficiaries found employment after having first progressed into voluntary work²⁹¹. A third example is the National Skills Academy for Retail (Skills Place) in Newham, a state of the art centre providing tailored skills development, apprenticeships and recruitment support to many of the shops, restaurants and facilities within Westfield Stratford City and beyond.

Alongside this, and although based on a very small sample, those respondents to the Host Boroughs Resident Survey who had benefited (either personally or through a member of the household) from employment opportunities related to the Games, 38% noted that they needed to be trained in new skills in order to support their move into employment.

The focus group with young people undertaken as part of the meta-evaluation also provided some interesting insight into the important role that work experience and volunteering can play in supporting employment beyond the Games. The young people talked passionately about their experience, and the experience of people they knew, of working in Games-times roles and in particular how through these roles they have gained valuable skills and experience, that will last and can be included on their CV – giving them an 'edge' in job interviews. They also noted that not only did Games-related roles give them good experience, the roles also provided them with a sense of achievement and potential.

Convergence

6.12 To what extent and how have the host boroughs responded to the 2012 Games and the Host Boroughs convergence agenda by delivering a more integrated approach to regeneration and the physical environment across East London, in terms of public realm, transport connectivity and new developments?

A key source of evidence for answering this research question was the stakeholder consultations, particularly those with a number of the individual host boroughs, the GLA, LLDC and DCLG. These consultations provided valuable insight into the extent to which there was a more integrated approach to regeneration across East London and the difference that this has made.

(i) A more integrated approach

Consultees were unanimous in their view that the six host boroughs did respond to the opportunity presented by the 2012 Games and the Convergence agenda by delivering a more integrated approach to regeneration. It was a response that was always predicated on the context that getting six autonomous bodies, with different priorities and issues to work together was a significant challenge, and not one to be underestimated. The Games, from as early as the

²⁹¹ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix B London Employment and Skills Taskforce for 2012*. Final Report to the London Development Agency.

bid stage, provided the impetus for the host boroughs to come together, to think collectively and to sign up to the same legacy objectives. The result of this was that not only did they agree to work closely together (for example forming the Joint Planning Authority Team which significantly improving the speed at which planning issues on the Olympic Park site could be dealt with) but it drove a joined up and coherent approach to regeneration at the strategic level, as well as providing momentum to ensure things happened.

This coherence and integration was supported by the creation of the Host Borough Unit which had the resource and space – away from the day to day delivery of local authority activity – to think strategically about regeneration and how best to maximise the opportunity of the Games. The commitment of the host boroughs to work together from the outset was also formalised through the publication of the Strategic Regeneration Framework in 2009 which set out a formal "*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*".²⁹²

Consultees also noted two further inter-related benefits of integration. The first was that by working together they had power, and a voice, as six boroughs that they would not have had individually. This was seen as particularly important given the number of significant voices involved in the delivery of the Games and their legacy (e.g. ODA, LOCOG, GLA, TfL, Central Government). Linked to this, it also meant that the range of different stakeholders involved (such as ODA, LOCOG, TfL) only had to have one conversation, as opposed to six. As a result, the host boroughs were able to ensure that all levels of Government and other related agencies fully subscribed to the Convergence agenda.

It was however "*never a perfect marriage*" and as such there was a need for flexibility, not least because they could not always do everything together. The result was that, in practice, the six local authorities developed a way of working whereby they would work together on some issues where there was a common objective but separately on others. In some instances this was because the issue was a locally specific one, for others it was because it made more sense to work with a different local authority (for example it was noted that in looking at violent crime it made more strategic sense for Waltham Forest to work with Haringey).

It was also noted by a number of consultees that there would always be some boroughs that would benefit more and need to be involved more due to their proximity to the Park. It is a point that is further underlined by the fact that much of what LLDC is currently doing requires the involvement of the four host boroughs of Hackney, Newham, Tower Hamlets and Waltham Forest.

However, despite these points and the politics of six authorities working together, the boroughs have remained united and committed around Convergence and the shared desire to make the most of the opportunity offered by the Games which, in the words of one consultee, was "*the best thing they did*". In addition, the fact that there is an on-going commitment to work together post-Games under the title of the Growth Boroughs only underlines both the value the individual authorities have seen in working together and the willingness to remain committed to the Convergence agenda.

(ii) The difference made

In terms of the difference that this integrated approach has made the view of consultees was that the most notable difference has been in improving the public realm, health, employment and skills as well as generally strong progress on the Convergence indicators. Consultees were of the opinion that there has however been much less impact on issues such as transport, inward investment and housing.

Focusing in on those areas where the integrated approach has made a more notable difference it was apparent through both the consultations and the wider evidence available, that:

²⁹² Host Boroughs (2009) *Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs*

- The host boroughs drove forward the implementation of a joint programme of public realm capital schemes comprising 71 projects structured around 10 priority packages. These improvements have made a very positive contribution to the transformation of East London as a place.
- The host boroughs have invested significant resource and effort into ensuring that local residents were able to access the employment opportunities arising out of the Games. Based on data from the ODA and LOCOG it is apparent that over 30,000 host borough residents found some form of employment as a direct result of the Games.
- The host boroughs provided a number of joint services, including planning, building control and regulation, which were instrumental in supporting the development of the Olympic Park and the successful delivery of the Games.
- The host boroughs have secured a top slice of the public health grant as well as a grant from Hackney and City Primary Care Trust to support the delivery of activities aimed at improving the health of host borough residents.

The progress towards the Convergence indicators is discussed in the following question.

6.13 How, and with what success, have the Host Boroughs built upon the catalyst of the 2012 Games to help deliver the convergence of major socio-economic outcomes between East London and the rest of London (including education and skills outcomes, employment levels and benefit dependency, housing quality, health, crime, and participation in culture, sport and volunteering)?

In 2009 the host boroughs first published a Strategic Regeneration Framework (SRF) which was a formal "*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*".²⁹³ To achieve this the host boroughs developed a framework and action planned that grouped a broad range of activities under the three themes of:

- Creating wealth and reducing poverty;
- Supporting healthier lifestyles;
- Developing successful neighbourhoods.

The key activities within each of these themes are shown in Figure 6-16.

Figure 6-16: Key convergence activities 2011-2015 by theme

Creating wealth and reducing poverty
<ul style="list-style-type: none"> • To ensure that the Work Programme²⁹⁴ is effectively delivered and supports Convergence • To maximise the Olympic employment legacy • To maximise the inward investment legacy • To develop partnership architecture with employers and training providers to support achievement of Convergence outcomes • To increase the levels and relevance of qualifications of host borough residents
Supporting healthier lifestyles
<ul style="list-style-type: none"> • To give the children of the host boroughs the best start in life • To reduce the number of people dying prematurely from preventable causes • To reduce the number of people whose health affects their ability to secure or maintain work • To increase physical activity and social capital through changes in the built environment • To increase sports and physical activity participation especially in sports benefiting from a facility legacy from the 2012 Games • To use Olympic and Paralympic momentum to motivate, raise aspirations and promote cultural activity

²⁹³ Host Boroughs (2009) *Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs*

²⁹⁴ A major new payment-for-results welfare-to-work programme that launched throughout Great Britain in June 2011.

Developing successful neighbourhoods

- To develop partnership arrangements for the developing successful neighbourhoods theme
- To reduce levels of violent crime and gang activity
- To complete the Olympic public realm improvements programme and secure the legislative changes necessary for more effective environmental enforcement
- To increase the number of affordable homes and reduce overcrowding
- To deliver new city districts with a range of accessible and high quality facilities

Source: Host Borough Unit

Sitting behind each of these activities is a detailed action plan with clear ownership and timeframe for delivery. For each theme there is also a clear set of measures, based on secondary data sources, that allow for a regular and comprehensive assessment of progress, both in terms of actual improvement against a 2009 baseline, but also – perhaps more significantly – in comparison to the rest of London. The most recent assessment of progress was made in June 2012 using the latest available data at the time. This is therefore an extremely valuable and robust source of evidence for answering this research question.

Based on the progress made by 2011 or 2012 (depending on data availability), looking at both the performance against the baseline and the comparison with London as a whole, the Host Borough Unit has made a summary assessment for each of the 23 indicators reviewed. Drawing on this assessment of progress it is possible to group the indicators into four categories. This is shown in Figure 6-17.

Figure 6-17: Progress by 2011/12 on convergence indicators

'Gap' reduced – Convergence on track	'Gap' reduced slightly – Convergence not on track
<ul style="list-style-type: none"> • 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 • Violent crime levels 	<ul style="list-style-type: none"> • Employment rate – aged 16 to 64 • Unemployment rate 16+ • Working age population qualified to at least NVQ Level 4 • No sport or activity (0 times 30 minutes per week) • Recommended Adult Activity (3 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 • Obesity levels in school children in year 6 	<ul style="list-style-type: none"> • Improved street and environmental cleanliness • % of households defined as overcrowded • Overall satisfaction • Economic Growth – job density • Economic Growth – income

Source: Host Borough Unit

Based on this analysis it is apparent that for 11 of the 18 indicators, for which data is currently collected, the gap with the rest of London is closing and that the host boroughs are on track to achieve convergence by 2020. For example:

- The proportion of 19 year olds achieving NVQ Level 2 threshold has increased from 73.6% to 83.5% and closed the gap with the rest of London from 4.4% to 2.4%;

- The proportion of children achieving a good level of development at age 5 has increased from 48.7% to 63.4% and closed the gap with the rest of London from 6.0% to 1.0%;
- The rate of violent crime has fallen from 28.9 per 1,000 population to 21.3 per 1,000 population and closed the gap with the rest of London from 6.1 to 3.1.

For a further five indicators the gap with the rest of London is closing but not significantly enough to date, for example the employment rate in the host boroughs has increased from 62.8 in 2009 to 64.1 in 2012 but the gap with London has only reduced from 5.5 to 4.5; and for one indicator the gap has reduced but this is actually due to worse performance in London (No sport or activity (0 times 30 mins per week)). There are five indicators that are new and only two where the gap has increased:

- The gap in terms of median earning for full time workers living in the area has increased from £30.70 in 2009 to £38.70 in 2012; and
- The gap in terms of obesity levels in school children in year 6 has increased from 2.2 percentage points in 2009 to 3.0 percentage points in 2012.

It is also worth noting that each of the themes uses one of the 23 indicators as its 'key measure', with two of the three currently on track so far. The key measure for:

- Supporting healthier lifestyles is 'life expectancy' for men and women, of which both are currently on track;
- Developing successful neighbourhoods is 'violent crime levels' which is on track; and
- Creating wealth and reducing poverty is the 'employment rate' which is currently *not* on track.

In all of this analysis it is important to note that there is still eight years to go in terms of the headline Convergence targets and that during this time East London will continue to experience a broad range of physical, social and economic transformation activities. However, the extent to which further progress is made on Convergence will in part rely on the continued commitment at all levels of government to this objective and the on-going coordination of activities aimed at driving socio-economic change in East London.

6.14 What has been the longer-term impact of the 2012 Games on catalysing private and public investment in East London (and wider Thames Gateway area), and how did the Games influence the form, scale and timing of key investment decisions?

As with a number of the other questions, it is not possible to assess the longer-term impact at this stage. However, based on the evidence available it is possible to provide some insight and to give a sense of both the scale of activity and the likely direction of travel.

It is apparent from a range of sources that since 2003 East London has seen a significant amount of private-sector led investment, with a significant amount of activity still in the pipeline. Through its work for the host boroughs, Oxford Economics²⁹⁵ identified 17 public and private-sector led developments (in addition to those directly related to the Games and their legacy) that will provide the key economic development inputs. Together the combined impact of these developments (coupled with the developments directly related to the Games such as iCity and the Park itself) would see the host boroughs gaining an additional 190,400 jobs and £36 billion GVA above baseline levels in East London by 2030.

However, in order to answer this research question, it is necessary to explore the extent to which these developments and this public and private sector investment are in any way attributable to, or been catalysed by the Games. This is a complicated assessment to make, not least because investment decisions are multi-faceted and based on a broad range of factors. It is an assessment that is also further complicated by:

²⁹⁵ Oxford Economics and Growth Boroughs, (2013) *Oxford Economics 2030 Forecast for London's Growth Boroughs – Summary*

- The global economic downturn that commenced in 2008 and the subsequent recession in the UK. For instance, a developer may have purchased land in East London prior to the award of the Games in 2005, but it is difficult to ever truly know whether, in the absence of the Games, they would have brought forward the development of that site in the same timescales or to the same scale;
- The fact that 'planning' for a site does not constitute a firm commitment to develop it, as there are a range of factors that could prevent a site from being brought forward for development including a lack of finance and failure to secure planning permission on one hand, to the desire for a developer to land bank on the other.

Where possible the meta-evaluation team has tried to unpick this complicated counterfactual for a number of the most significant developments in and around the Olympic Park through both an examination of the evidence available and consultations with a number of key stakeholders, including the relevant local authority and the developer.

The investment made by Westfield in Stratford City – a site adjoining the Olympic Park – is perhaps the most significant private-sector led project in East London. It is also one where the evidence of the impact of the Games is strongest and the wider regeneration effects best illustrated. The Economic Impact Assessment of the Westfield Stratford City Development²⁹⁶ clearly sets out the scale and nature of these effects on phase 1 of 'Zone 1' of this development. Zone 1 comprises two phases: Phase 1 included 1.9 million square feet of retail and leisure space – the "*largest urban shopping centre in Europe*" – and opened in September 2011. Phase 2 comprises a significant amount of commercial space, along with some leisure, and is expected to be fully completed by 2020.²⁹⁷

It is apparent through the economic impact of Westfield Stratford City, the LDA evaluation and consultations undertaken as part of the meta-evaluation with Westfield that Westfield intended to develop the shopping centre at Stratford City (Phase 1) prior to the formal launch of London's bid for the 2012 Games.²⁹⁸ However, what is also apparent through all three sources of evidence is that in reality the delivery of Phase 1 was "*made possible by the infrastructure investment underpinning the Olympic Games*"²⁹⁹ – investment that the Economic Impact study estimates to be in the order of £500-£600 million.³⁰⁰ It should be noted that in addition to this, the private sector investment from Westfield was around £1.43 billion for the retail elements of Phase 1 plus a further £180 million for the hotel and office elements in Phase 2.

In particular, the LDA evaluation notes two explicit ways in which the investment in the 2012 Games supported this development:³⁰¹

- The Compulsory Purchase Orders (CPOs) the LDA implemented as part of its acquisition process benefited Westfield Stratford City by also including land in the area which Westfield was seeking to develop. This enabled economies to be realised and also ensured that private sector investment (through Westfield) was levered in to cover some of the costs associated with the CPOs;
- The impact of the economic downturn on the Westfield Stratford City development was minimised "largely because the development was so closely linked to the delivery of the Olympic Village" and as such "it was protected by the Government under its commitments to the 2012 Games". This ensured that the necessary momentum remained while the required infrastructure was completed.

²⁹⁶ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

²⁹⁷ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

²⁹⁸ *Ibid*

²⁹⁹ *Ibid*

³⁰⁰ Volterra based this estimate on historical estimates of both infrastructure items required to deliver the site and Section 106. obligations across Zones 1 to 7 of the Stratford City outline planning permission. Research by the meta-evaluation team directly with Westfield suggests the public sector infrastructure investment (channelled through the ODA) may have been as low as £200 million.

³⁰¹ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

As a direct result of this Games-related investment, the Economic Impact study (in direct consultation with Westfield) estimate that it enabled Westfield to "*bring forward [the] development around 5-7 years earlier than would otherwise have occurred*". The study assumes this means that the economic impact³⁰² arising out of the development is being delivered 5 to 7 years earlier as a result of the 2012 Games. The Economic Impact study put the value on delivering these benefits earlier at between £1.1 billion and £1.6 billion to the London economy, if 5 years earlier; and between £1.5 billion and £2.2 billion if seven years earlier. By evaluating this impact against the relevant public sector spend of £0.6 billion on infrastructure underpinning the Games, the Economic Impact study concludes that it represents very or extremely good value for money (depending on which figure is used).³⁰³ However, this positive outcome does need to be viewed within a wider East London context, particularly the potential for increased competition for high streets and town centres across the area as a direct result of a successful Westfield Stratford City.

The view of consultees was that the Games was also likely to have had a catalytic impact on Lend Lease's investment in the further development of the Stratford City site – the International Quarter – which will provide 4 million sq ft of workspace, a new hotel, 52,000 sq ft of shops and restaurants and 350 new homes. Consultees were of the opinion that because this development was always part of the wider Stratford City site it will have benefited from the Games in a similar, but less direct way, to the Westfield development. In particular, the development of the Lend Lease site was thought to have been made "*easier*" as a result of the Games because it is part of a much wider development and transformation process. As such it was thought to have been insulated from any wider concerns that may have otherwise existed around the commercial viability of this type of mixed used development.

Moving beyond the immediate vicinity of the Park and the picture around the extent to which the Games have influenced wider public and private sector investment becomes more blurry. A good example of this is the Strand East project in Stratford being developed by Inter IKEA Group. This mixed use development on a 10.1 hectare site will provide up to 1,200 new homes (39% of which will be family housing), a 350 bed hotel, 600,000 sq ft of commercial space including flexible work and exhibition space for creative industries. The decision by Inter IKEA to invest in the site was taken in 2009 and the view of consultees was that while the Games were part of the thinking in terms of the investment decision it was the site itself with its heritage and waterfront that was seen as the real opportunity. As such, it is hard to separate out the influence of the Games.

For other opportunities, such as the regeneration of Canning Town centre, the expansion of the ExCeL Exhibition centre and the regeneration of Woolwich Town Centre, consultees were more certain that the Games had no influence. These were long standing projects that they felt would have been implemented in the absence of the Games and were not undertaken any sooner as a result of the Games. In fact consultees were of the opinion that the further you move away from Stratford, the less apparent the Olympic effect is.

An examination of the private sector developers currently active in and around the Park makes it clear that, whether influenced by the Games or not, the area is attracting investment from an international market:

- Lend Lease (the International Quarter) – Australia
- Inter IKEA (Stand East) – Sweden
- Westfield (Shopping Centre) – Australia
- Emirates (Cable car) – United Arab Emirates

³⁰² Volterra estimate that the construction of Phase 1 created the equivalent of 10,400-11,900 job years and generate earnings of between £370 million and £390 million. It also estimated that the operation of Phase 1 would create the equivalent of 10,000 permanent jobs – with a head count as high as 14,100 – through its retail, leisure and commercial operations, which could generate between £165 million and £215 million in annual earnings from September 2011 onwards.

³⁰³ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

- ExCeL Exhibition Centre – Abu Dhabi
- Qatari Diar/Delancy (Athletes Village) – Qatar/UK
- Siemens (Crystal sustainable technology centre) – German

Another interesting angle related to the private and public sector investment story, is the interest in the area from higher education institutions. The area is already home to the University of East London (UEL). But more recently Birkbeck, in a joint venture with UEL, will open a new campus in Stratford's cultural quarter in the autumn of 2013. It was a decision that was felt to not have been directly made because of the Games, but given the Games' influence on transforming Stratford (with the Park, transport improvements and Westfield in particular) and making it a first class location, the Games have clearly had a notable indirect influence.

In addition Loughborough University has also recently taken space in iCITY (see above), and again the influence of the Games appears to indirect rather than direct. Through consultation with Loughborough University it was apparent that the attraction of London as a campus location and particularly its proximity to blue chip companies and government, coupled with the desire to broaden the University's appeal to students were more of a direct influence on the decision to move to London than being located on the Olympic Park or associated with the Games. As an indirect influence, the Olympic Park and the iCITY location – which would not have existed in this part of London without the Games – was felt to provide a good fit with the University.

While interest from higher education institutions cannot be directly attributed to the Games, in the words of one consultee it can certainly be considered to have been "*inspired by the Games*" and the way in which the Games, particularly through the development of the Park and the investment in transport, have transformed this part of East London. Therefore, given the counterfactual position noted above and the additionality of the Games in transforming Stratford as a place, the indirect influence of the Games is obvious. Indeed it could be argued that this influence is actually a direct one. While the Games may not have been a direct factor in the decision making process of an individual higher education institution, using the Games as a catalyst to transform East London so that it attracted wider public and private sector investment was a key part of the original rationale for hosting the Games in this part of London.

6.15 To what extent have the 2012 Games and legacy investments enhanced the image of and satisfaction with East London as a place to live (and for whom), and how has this contributed to social and economic change in the area?

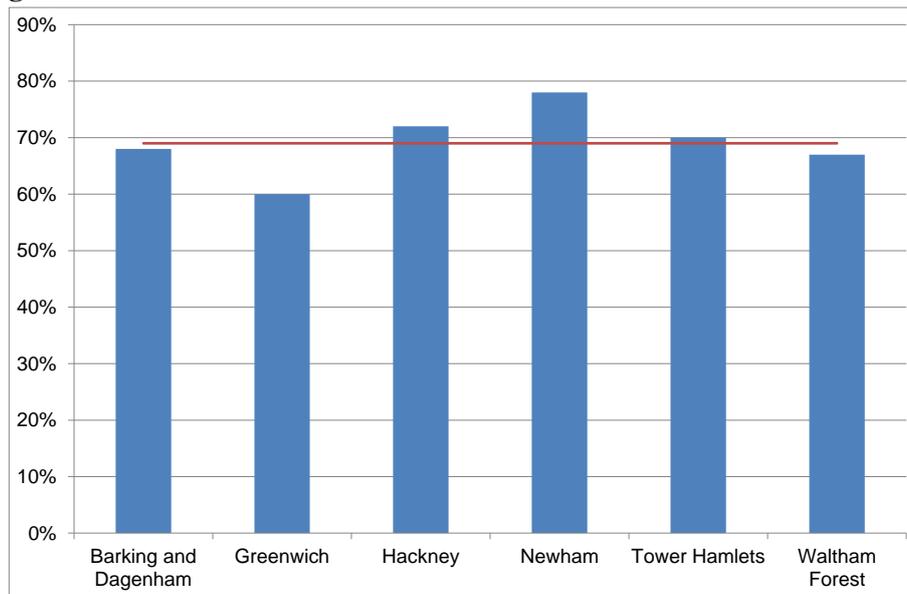
Given the investment in the area in relation to the Games and its legacy, an important question is the extent to which these changes have and are impacting on the image, perception and satisfaction of East London, both amongst local residents and Londoners generally but also more widely, particularly in the media.

(i) East London resident perceptions

An important source of evidence in answering this research question is the Host Boroughs Resident Survey. Respondents were asked, prior to the Games, whether they thought that the 2012 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 had, with 37% 'strongly agreeing'. This headline view was broadly reflected across the different age groups, genders and working status, although in terms of ethnicity, non-white respondents (75%) were notably more positive than 'white' respondents (66%). Given that this survey was undertaken before the Games had taken place, and following a period of disruption (due to Games preparation activities) with little realisation of the longer-term benefits of the Games, this can be seen as a positive finding (Figure 6-18).

Across the six host boroughs opinions varied more significantly with residents of Barking and Dagenham and Greenwich generally less positive than those in Newham (20% and 23% respectively, disagreed that the Games would be good for London compared to 11%).

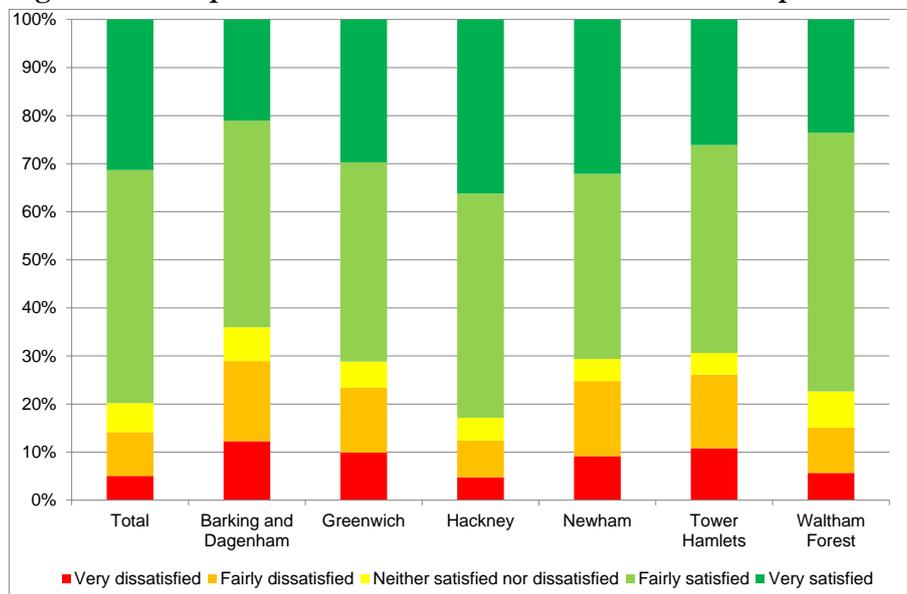
Figure 6-18: Proportion of respondents 'agreeing' that hosting the 2012 Games would be good for London as a whole



Source: Olympic and Paralympic Host Boroughs Resident Survey
 Note: Red line shows the total for all respondents

Over three-quarters (79%) of respondents to the survey were satisfied with their local area as a place to live, a third of whom (31%) were 'very satisfied'. Only 5% of respondents were 'very dissatisfied' with their local area as a place to live (Figure 6-19). This finding compares³⁰⁴ favourably with DCLG's 2008 Place Survey which found that across the host boroughs resident satisfaction with their area as a place to live was 65%, a finding that at the time was notably lower than the London average of 75%.³⁰⁵

Figure 6-19: Respondent satisfaction with their local area as a place to live



Source: Olympic and Paralympic Host Boroughs Resident Survey

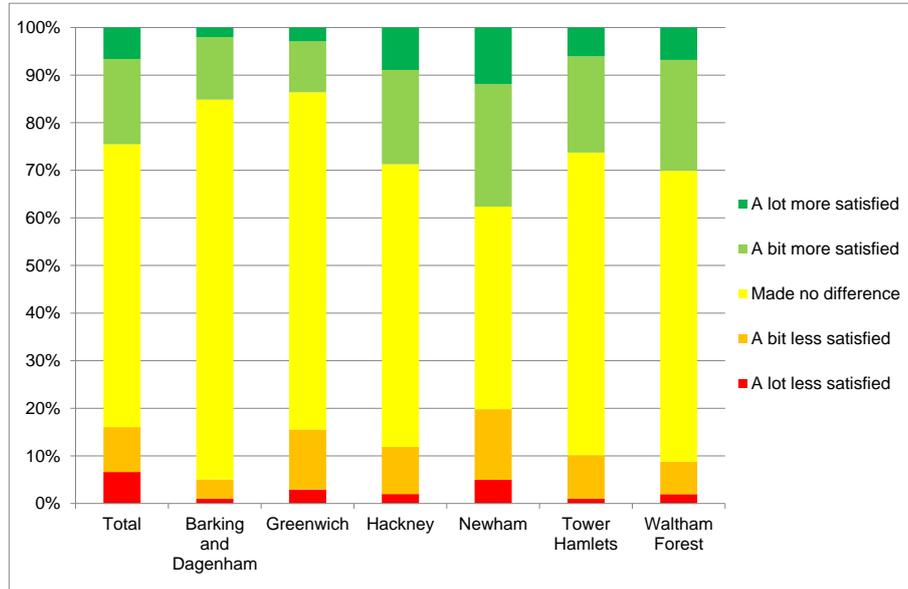
A quarter (26%) of the respondents felt that hosting the Games had made them more satisfied with their area as a place to live, 10% felt that it had made them less satisfied and the majority (63%) felt that it had made no difference. Respondents who lived in Newham were more

³⁰⁴ It should be noted that this is an imperfect comparison owing to the fact that the results are taken from different surveys which will have been undertaken using different methodologies

³⁰⁵ Department for Communities and Local Government (2008) *Place Survey*

positive than those in the other host boroughs with 39% stating that hosting the Games had made them more satisfied with their area as a place to live (Figure 6-20).

Figure 6-20: Extent to which hosting the Games has made respondents more satisfied with their area as a place to live

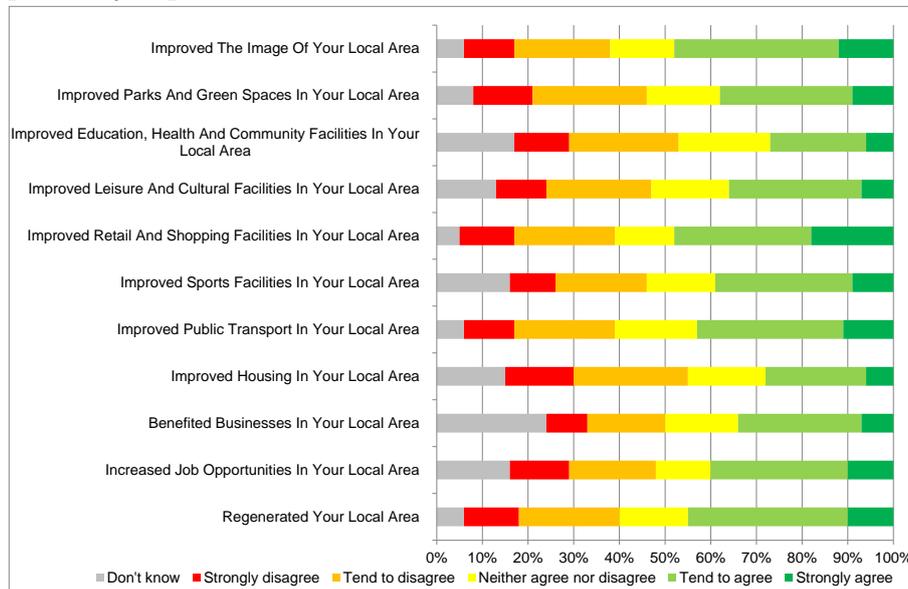


Source: Olympic and Paralympic Host Boroughs Resident Survey

Respondents were asked to comment on the extent to which the preparations for the 2012 Games have already impacted on local neighbourhoods, in terms of the positive impacts. Respondents were fairly evenly split, between those that 'agreed' that the Games had already had a positive impact and those that 'disagreed' (Figure 6-21), with no one position supported by more than half of the respondents. With this caveat noted, the three most significant impacts in the local area at this point in time (pre-Games) appear to be improvements to:

- Retail and shopping facilities (with 48% of respondents agreeing, most likely because of the opening of Westfield and the fact that it is a tangible benefit);
- The image of the local area (48%);
- Public transport (43%).

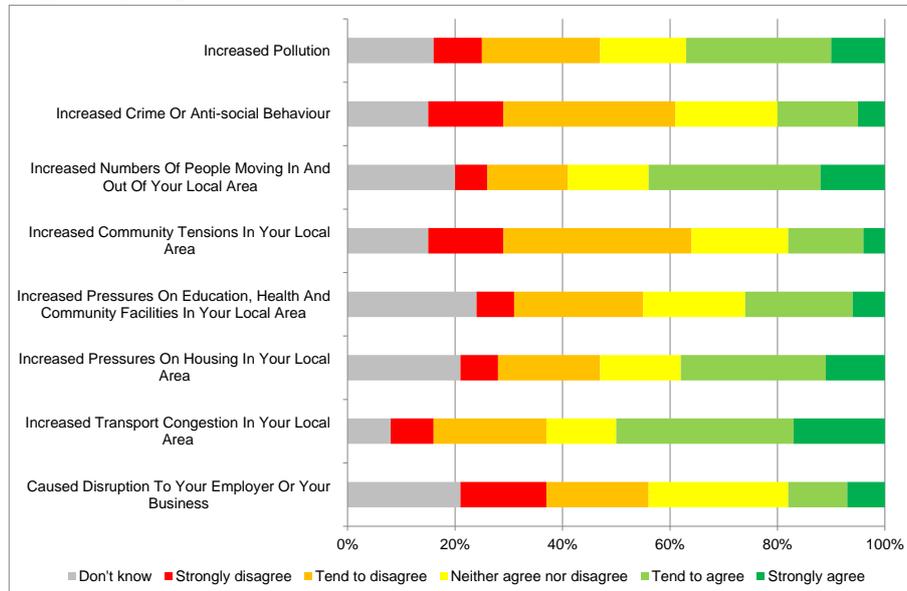
Figure 6-21: The extent to which the preparations for staging the 2012 Games have positively impacted the local area



Source: Olympic and Paralympic Host Boroughs Resident Survey

In terms of the negative impacts to date, respondent views were again mixed (Figure 6-22). Half of the respondents agreed that the preparations for staging the Games had increased transport congestion in the area (50%) and 44% felt that the Games had increased the numbers of people moving in and out of the area (a perception that is not supported by the questions about mobility which suggest that three-quarters of the respondents had lived in the area for more than five years).

Figure 6-22: The extent to which the preparations for staging the 2012 Games have negatively impacted the local area



Source: Olympic and Paralympic Host Boroughs Resident Survey

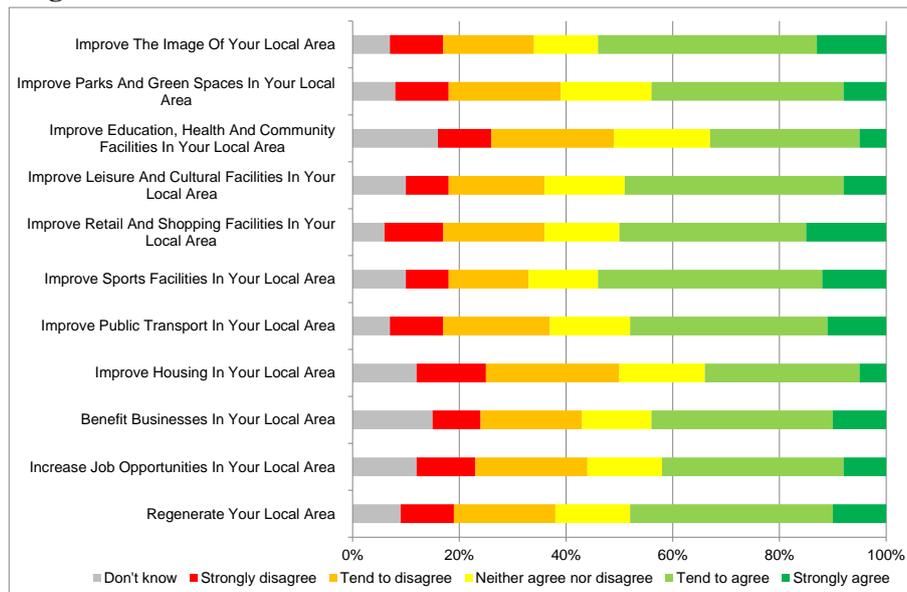
Thinking longer term, respondents were more positive (Figure 6-23). Over half of the respondents 'agreed' that the long-term impacts of the 2012 Games will improve:

- The image of the local area (54%);
- Sports facilities in the local area (54%); and
- Retail and shopping facilities in the local area (50%).

All of these suggest that respondents are aware of the potential future benefits arising from the transformation of the Olympic Park.

There were only two factors where more respondents disagreed than agreed and these were the extent to which the Games will improve housing in the local area (38% thought that it wouldn't compared to 34% who thought that it would) and the extent to which it will improve education, health and community facilities (where the same proportion of respondents at 33%, thought that it wouldn't as those who thought that it would).

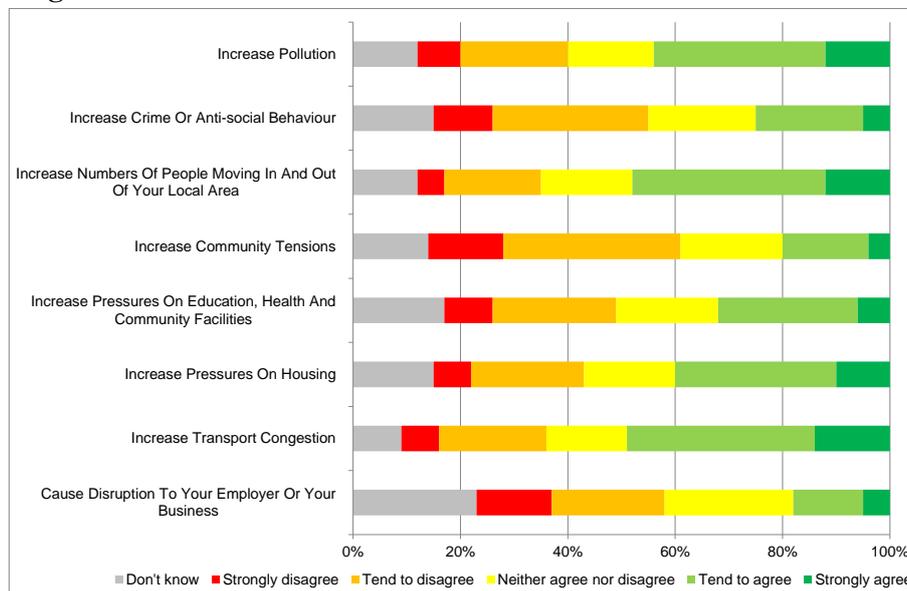
Figure 6-23: The extent to which the 2012 Games will positively impact – over the longer term – on the local area



Source: Olympic and Paralympic Host Boroughs Resident Survey

With regard to the negative factors, increased transport congestion (49%) (despite the implementation of significant improvements in local transport facilities) and increased numbers of people moving in and out of the area (48%) remained the two most common longer term concerns, with respondent views generally mixed across the remaining factors (Figure 6-24).

Figure 6-24: The extent to which the 2012 Games will negatively impact – over the longer term – on the local area



Source: Olympic and Paralympic Host Boroughs Resident Survey

The two focus groups undertaken as part of this meta-evaluation also provided some further valuable insight in to how the community now perceive East London and the extent to which they were satisfied with the area as a place to live.

It was apparent across both groups that the Games had given residents a greater sense of pride in their area. The view was that local people are no longer embarrassed to say they live in the area. It was a pride that was felt to have arisen both from the success of the Games but also because of how visually different the area looked. Participants also cited the fact that transport has improved significantly; that they feel safer; that there is more green space in the area; that

people aspire to live on the Park and want to stay in the area. Westfield was also cited as a real positive in terms of providing a place for young people to go, shop and spend time with friends.

Respondents did however note that while the Games have significantly improved the area around the Park further improvements need to be made across the whole of East London so that it can be 'brought up in line' with the Park improvements. Respondents also noted the negative effect that the Games had on local shops in Stratford as Games visitors were channelled straight from the transport links through to the Park and therefore there was little passing trade.

Two further negatives were noted by one of the groups in relation to housing. One was that a number of landlords had ended tenancy agreements prior to the Games in the hope that they would re-let with better rates due to the Games demand. The other was that there were felt to be a lot of transient construction workers who were now squatting in the area as they no longer had employment on the Park.

(ii) London residents' perceptions

Through the Olympic Monitoring Research undertaken by the GLA pre, during and at two points post Games³⁰⁶ it is clear – based on a representative sample of Londoners – that the regeneration of East London was the second most recognised benefit of the Olympic Games. 56% of respondents identified it as a benefit in the pre-Games survey in May 2012, 64% identified it as a benefit in the during-Games survey in August 2012, 56% identified it as a benefit in the post-Games survey in October 2012 and 59% identified it as a benefit in the post-Games survey in March 2013.

(iii) Media perception

As part of the meta-evaluation Lancaster University³⁰⁷ was commissioned to undertake a media analysis focused on answering a series of questions, one of which was: did the Games alter perceptions of East London as a place to live, work and invest? To do this, the study explored a very large collection of new reportage and general English: approximately 13 billion words of general English from 2008 to 2012; 93 million words of UK national newspaper reporting; and 35 million words of global press reporting.

Using specialised computer software and linguistically informed investigations of patterns the study was able to conclude that *"there is little doubt in the UK Press [that] the Games shifted discussion of East London away from what seemed to be an almost exclusively negative discussion focussed upon poverty and welfare dependence towards a more positive discussion focussed upon regeneration and investment"*.

More specifically, in seeking to unpick this effect the study found that in the UK press, the representation of East London in the first half of 2012 was split between reference to the City and the East End. The City was characterised *"as a place of big business"* and some of the negative connotations of that, while the East End was represented *"as being associated with welfare and economic problems"*. The result of which is that overall East London and particularly the East End is *"represented fairly negatively"*. However, in the latter half of 2012 East London is *"more positively represented being written about in term of regeneration and investment and less in terms of poverty and welfare dependence"*.

In terms of the Global Press in the first half of 2012, discussions of East London focused on the City and Canary Wharf in an even more pronounced way than in the UK press. In fact in the Global Press the study found that *"East London is seen as a place where one trades and invests through, rather than one trades and invests in"*. However, in the second half of 2012 there is again a change in reporting *"every bit as profound as that which occurred in the UK press"*, as the positive association of East London with the Games emerged as a *"notable focus for reporting"*. This leads

³⁰⁶ Greater London Authority (2013) *London 2012 Monitoring Online Survey of Londoners, 2012-2013*

³⁰⁷ Tony McEnergy, Amanda Potts and Richard Xiao (2013) *London 2012 Games Media Impact Study*

the study to conclude that *"overall, the Games appear to have made the world focus more on East London, rather than the City of London, and appear also to have highlighted investment with regard to the area"*.

Looking specifically at the individual host boroughs it is apparent that in the UK press they *"gain positive associations via their identification with East London"* and in the case of Newham in particular the *"more negatively loaded associations...relating to welfare fell away after the Games and a more positive set of associations became evident"*. In terms of the global press the *"host boroughs generally attract positive associations relating to regeneration and investment through the Games"*.

The study concludes by noting that: *"the Olympics and Paralympics have [positively] altered perceptions of East London as a place to live, work and invest in"*.

However, at this stage it is still too early to comment on the extent to which these improved perceptions both of residents and in the media have impacted on and contributed to socio-economic change in East London noted above.

7 Lessons Learnt

7.1 Introduction

Mega-events of the scale and complexity of an Olympic and Paralympic Games offer significant learning opportunities, not only for those involved in the preparation and staging of the event, but also for those planning and delivering future ones. By taking a moment to step back and consider the objectives, ultimate outputs and outcomes, both qualitative and quantitative, an interesting and insightful picture can develop to guide other host cities and countries to deliver successful events with their own long-lasting legacy.

The lessons learnt review of the London 2012 Games undertaken to inform the meta-evaluation is based on a series of stakeholder and strategic consultations, primary research and evaluation evidence used to answer the research questions.

The lessons are presented in the following sections by meta-evaluation theme. A clear set of topics can be distilled from the lessons, touching on organisational challenges and benefits, the need to maximise and coordinate resources, the benefits of partnership working and a coordinated approach, and the need for long-term planning balanced with flexibility.

Sport

7.2 What lessons can be learned by host cities and countries about how to maximise the sporting and physical activity benefits from staging mega-events?

Host cities and countries typically articulate a range of economic, social and environmental motivations for hosting mega-events such as the Games. In the case of mega-*sporting* events, hosts often point to ambitions to increase participation in sport and engagement in physical activity generally as primary motivations; however, evidence indicates this outcome is not always achieved. The evidence to date indicates that in the case of the UK, the Games have been successful in bringing about an increase in sport participation as a result of its Games.

The experiences of London and the UK in hosting the 2012 Games highlight a number of lessons resulting from the approaches taken to maximise the potential sporting and physical activity benefits of staging the Games, including partnership working, effective co-ordination of resources, common strategy and changes in attitudes and behaviours.

(i) Partnership working between relevant public, private and third sector organisations to help secure the sporting legacy

In terms of partnership working to help secure the sporting legacy the following lessons were identified:

- **The importance and value of working together to secure a sporting legacy around a common goal.** Sport England indicated that the Games resulted in a common goal for key sporting stakeholders focused on increasing sport participation facilitated by improved engagement by both Sport England and UK Sport with local authorities and National Governing Bodies (NGBs) and other stakeholders. Stakeholders indicated that improved partnership working, in addition to helping to facilitate the sporting legacy, also helped improve or establish relationships between organisations. By working together, organisations gained a better sense of the issues and challenges their partner agencies (and others) face. Working together and sharing their experiences, they were able to find more effective ways of partnering which responded to the parameters within which each organisation operates. As a result, a 'one team ethos' was created with a common set of

goals to guide partners. Overall, stakeholders noted the following successes pointing towards improved partnership working: improved transparency, better understanding of the different organisations and greater collaborative working.

- **Partnership working is harder to sustain with the return to "business as usual".** Stakeholders ultimately shared the view that the Games presented a huge responsibility, but a great opportunity. It was noted by some that in the absence of the catalysing influence of the Games, partnership working has become increasingly challenging. Concerns were raised about how to ensure the successful inroads made as a result of the Games as the mechanism for coalescing and focusing efforts could be capitalised on and sustained.
- **Real clarity around what individual organisations were responsible for,** with these organisations taking full responsibility for ensuring that a sporting legacy would remain. The key sporting organisations ultimately responsible for ensuring the sporting legacy are Sport England and UK Sport. Sport England is focused on the creation of a world-leading community sport system in England that will grow and sustain participation in grassroots sport and create opportunities for people to excel at their chosen sport. UK Sport has responsibility for elite success and attracting major sports events. Sport England and UK Sport in turn support NGBs, County Sport Partnerships, the Youth Sport Trust and local authorities who are responsible for delivery and implementation of the various sporting programmes.
- **The value of a range of partners.** For example, local authorities have responded to an increase in participation by increasing the number of coaches available, putting on additional sessions or increasing the capacity of existing sessions, investing in new facilities and supporting clubs. This provides valuable support to help sustain the increased participation facilitated by the various sporting stakeholders.
- **The value of partnerships between private and public sector organisations.** Although there is limited evidence on private sector initiatives, there are signs that coordinated efforts between the private sector and public and third sector partners are contributing to maximising the sporting and physical activity benefits from staging the Games. Sainsbury's, with support of Paralympics GB and the Youth Sport Trust, developed Active Kids for All Inclusive PE training. Sainsbury's is building on the momentum, aiming to create a lasting legacy for disabled people after London 2012 by committing to investing £1million over the next four years to support this initiative.

(ii) **The effective co-ordination of resources around a common strategy (including through capitalising on existing programmes, the use of the Olympics and a Paralympics brand and the inclusion of new initiatives in response to gaps)**

There are a range of resources associated with delivering the Games, many of which facilitate a sporting legacy. These include sporting organisations, people (e.g. volunteers), the various brands, television coverage and financial resources. In order to co-ordinate these resources effectively, the range of tools needs to be known, with investment targeted to maximise both the Games and legacy.

In terms of the co-ordination of resources around a common strategy, the following lessons were identified:

- **Planning for legacy early is crucial and it is a long-term objective.** Stakeholders indicated that planning for legacy early is critical in ensuring it is successful. This can be done by ensuring objectives are agreed and resources identified and allocated at the initial stages of a mega-event. In the case of London, legacy was integral to the Games from the start, with legacy programmes and investments made from when London won the right to host the Games.
- **The need for appropriate funding and strong delivery partners to meet objectives.** With the 2012 Games sporting legacy objectives clear from the start, it was possible to allocate significant funding towards participation, infrastructure and elite performance. The Games also aligned Sport England's and UK Sport's objectives (related to increasing

participation and ensuring elite performance). These organisations engaged and worked with a range of partners, including NGBs, local authorities, CSPs and other organisations to deliver the objectives.

- **The London Olympic and Paralympic brand is an underutilised resource due to restrictions on its use.** There was some stakeholder concern that the London 2012 Olympic and Paralympic brand was not as useful as it could have been due to the International Olympic Committee's (IOC) branding restrictions. The opportunity to more strongly link the Games to grass roots participation was diminished due to the inability to use the brand more widely, which itself was ultimately a great success and widely recognised. Stakeholders felt that more could have been made of the facilities and programmes put in place to increase participation if the Games branding could have been used in association with facilities which were not Games venues and programmes (e.g. facilities developed as part of Places People Play) to draw attention to these legacy facilities.

(iii) Encouraging attitudinal and behavioural and sustainable change

In order to maximise the sporting and physical activity benefits from staging the Games, a range of efforts were undertaken to encourage sustainable attitudinal and behavioural change, as real sustainable change is needed to ensure that sporting legacy benefits can be maximised.

In terms of encouraging attitudinal and behavioural and sustainable change to help secure the sporting legacy the following lessons were identified:

- **Attitudinal and behavioural changes can occur in a number of areas,** and it is important that these areas are identified, and efforts and resources targeted. One of the key attitudinal changes reported has been with respect to disabled people, primarily through the Games showcasing what disabled athletes can achieve. Stakeholders commented that the Paralympic Games has changed attitudes towards disability, with people taking more sophisticated views towards disability and disabled people. Volunteering was another area highlighted by stakeholders as demonstrating attitudinal changes with volunteering seen as aspirational. Volunteers have the potential to maximise sporting opportunities. For example, Sport Makers have indicated they plan to continue to volunteer in sport, creating opportunities for others to participate thus helping to maximise the sporting legacy.
- **On-going efforts are required to secure sustainable change.** The Games facilitated attitudinal and behavioural change but on-going effort is required to ensure that this translates into sustainable change. For example, sport participation has increased in recent years with the Games acting as a motivator for this increased participation, supported by a range of programmes and investment in infrastructure. The extent to which this is sustainable is not known and will only be revealed in time. On-going investment in participation programmes is however likely to be required to ensure that this increase is sustained.

Economy

7.3 What lessons can be learned by host cities and countries about how to maximise the economic legacy benefits from mega-events?

The London 2012 Games offer a variety of lessons around securing economic legacy benefits, ranging from overcoming geography, securing benefits across the business community and tackling complex economic challenges.

(i) Mechanisms for spreading and sustaining the benefits across the country, and amongst SMEs and minority-owned businesses

With regard to spreading and sustaining the benefits across the country, the following lessons were identified:

- **A website and electronic brokerage system can be a valuable mechanism for ensuring businesses can access opportunities related to the preparation and staging of events.** The main mechanism for spreading and sustaining the benefits of Games contracts across the UK was the CompeteFor electronic brokerage service. There was a general consensus amongst the key stakeholders that CompeteFor and associated regional support systems were largely successful in terms of engaging UK businesses in Games-related business opportunities with a total of 166,388 businesses registered with the service. While the majority of Games contracts were awarded to businesses in the London and South East regions, evidence indicated that businesses in all of the UK regions benefited from using the CompeteFor service to access information on Games-related opportunities. CompeteFor monitoring data indicates that 9% of these businesses were black and minority ethnic (BAME) owned/ led businesses which is in line with the proportion in the total population of UK businesses.
- **Ensuring the benefits of project contracts are shared throughout the supply chain can be secured through contractual mechanisms.** In the early years of the CompeteFor service (i.e. between 2007/08 and 2009/10), the Buyer Engagement Team (BET), which trained, supported and encouraged prospective buyers to post contract opportunities on CompeteFor, had limited success in penetrating Tier 1³⁰⁸ contractors of the Games supply chains. The profile of Games contracts and pressure to deliver on time initially discouraged potential buyers from using the system which would have ensured wider access to opportunities. A contractual flow-down clause requiring lead contractors to advertise sub-contracts through the CompeteFor system was not reinforced at an early stage by the Olympic Delivery Authority (ODA) for the major construction contracts. Through wider application of the flow-down clause, the London Organising Committee of the Olympic and Paralympic Games (LOCOG) was able to engage a much greater number of Tier 1 contractors to use of CompeteFor in this way.
- **The need to ensure that key players in the business community in all regions of the host country are engaged in the business opportunities from the outset.** Evidence gathered for the London 2012 Nations and Regions Group (NRG) indicated that the success of businesses in securing Games-related contracts in regions outside London was aided significantly by the early recognition of the need to put in place support structures and resources to help firms overcome informational barriers. This was demonstrated in the West Midlands region where a regional ‘Task Force for 2012’ was formed early on (in 2006), with membership from all of the key business groups in the region. All of the region’s key business groups bought into an ambitious 2012 business objective for the region. Over 70 seminars, workshops, and other London 2012 business briefings were held in the region to publicise the opportunities from the Games and support businesses in the bidding process. This appeared to help the West Midlands region to achieve one of the best success rates in terms of number of contracts won relative to the size of the business population.

(ii) Using the Games to help tackle worklessness and promote environmental sustainability and the public, private and third sector partnership working required in support of this

Worklessness and environmental sustainability are complex areas of legacy. The lessons learnt from the 2012 Games reflect the challenges of partnership working in support of ensuring maximum legacy benefits to address these issues.

³⁰⁸ The level of the main contractor

- **The contribution of a coordinated approach.** A coordinated approach by the public, private and third sectors is a key lesson with regard to helping workless people benefit from job opportunities created by the Games. The Greater London Authority's (GLA) Employment and Skills Brokerage was successful because it was exemplary in its work to coordinate the efforts of a range of agencies, action-orientated (leading to the timely commitment of time and resources), and partners were motivated and enthused by the opportunity of the Games “to ensure that [employment and skills brokerage] succeeded”. Specific success factors highlighted include: the coordinating role of the Host Borough Unit, an Accord type approach to working with private sector contractors in a seamless way, the use of an intranet to share information on vacancies and data sharing protocols and the establishment of a dedicated Job Centre Plus team in Stratford.
- **The benefits of establishing an independent authority at an early stage that can act as a ‘critical friend’ regarding sustainability.** This critical friend to the organisers can help ensure appropriate sustainability targets are established and then adhered to. The Commission for a Sustainable London 2012 (CSL) was an independent body which monitored and assured the sustainability of the 2012 Games. The vast majority of delivery body consultees felt that CSL added significant value to the sustainability of the London 2012 programme. In the early period of CSL, the focus was on ensuring that sustainability was embedded within the overall governance arrangements and strategy for London 2012. Although the impact of this ‘embedding’ activity is extremely difficult to quantify, particularly retrospectively, in helping to build understanding of sustainability and establishing a direction of travel, it is likely to have been significant.
- **The need to ensure that appropriate governance mechanisms for sustainability are established at the outset.** Evidence from CSL reviews suggests that the London 2012 Sustainability Group played a key role in ensuring that sustainability was embedded in the governance of the preparation and staging of the Games. The Group was co-chaired by the GLA's Executive Director of Environment and Development and the Department for Environment, Food and Rural Affairs (Defra) Director for Sustainable Development. It was attended by Heads of Sustainability for key stakeholders and contributors from significant wider stakeholders including key Government departments. There was a clear consensus amongst stakeholders that the London 2012 Sustainability Group provided appropriate and clear leadership over all aspects of sustainability.
- **The benefits of developing a clear strategy and action plan for the dissemination of sustainability good practice supported by designated resources and clear ownership.** There is clear evidence that the ODA's approach to the construction of the Olympic Park set new benchmarks for sustainability practices in the context of large-scale construction and infrastructure projects. The ODA and LOCOG both produced a comprehensive suite of learning legacy material providing detailed accounts of key elements of sustainability good practice. However, despite the intellectual capital generated by the ODA's learning legacy materials on construction and the potential to take advantage of the unique opportunity that the profile of the Games brought to promote and showcase good practice, stakeholders believed that an opportunity may have been missed in maximising learning and sharing of information. Stakeholders were of the view that the Government or other industry bodies could have perhaps played a stronger role in the dissemination of learning and that this would have been helped if roles were clearly defined from the outset and a long-term action plan was developed that supported information sharing in the post-Games period.

Community Engagement

7.4 What lessons can be learned by host cities and countries about how to maximise the Community Engagement legacy benefits (including cultural, educational and civic benefits) from mega-events?

The community engagement legacy theme placed a focus on bringing the Games to communities up and down the country, to ensure that the social benefits were shared beyond

East London, and increasing access to opportunities for groups which are generally under-represented or face barriers to participation (e.g. disabled people). London's efforts to maximise the community engagement legacy benefits provides lessons on branding, coordination and communication at the national level, strengthening community infrastructure for delivery and approaches to sustaining benefits.

(i) Developing a powerful brand identity for the host city and country

The Olympic and Paralympic Games themselves are unique and high profile events with a strong brand identity. For example, the Olympic rings are widely recognised throughout the world. However, efforts to establish an Olympic brand unique to London and the UK offers some important lessons.

- **An Olympic brand unique to the host(s) can be far reaching in use.** Work was undertaken to develop and promote a unique identity for the London 2012 Games, centred on a recognisable logo which was then reflected in the logos developed for Inspire Mark, Games Maker (Box 7-1) and the Cultural Olympiad, resulting in it becoming widely used and recognised across the country. The Inspire Mark logo was felt by many to have given projects greater profile, suggesting that schemes like it which link to the Games brand and reach out to the local level can be a valuable as a way of sharing the profile of the Games more widely and provide a banner under which to promote and encourage civic engagement in the host city and country.

Box 7-1:

The Games Maker volunteer programme had a strong brand intrinsically linked to London 2012, and by association with London and the rest of the UK.

The efforts which went into designing the programme, including the branding, coordinated uniforms and high quality of training received by volunteers all contributed to the creation of a strong identity for Games Makers, supported by the high media profile and recognition of volunteer efforts. The programme is widely regarded to have been a huge success and provides a model which can be deployed at other major events in the UK and overseas.

Promotion of volunteering was a key strand of the community engagement legacy, given the link between volunteering behaviour and positive community cohesion outcomes. The success of the Games Maker programme is felt to have impacted positively on the image of volunteering, although it is not yet clear if this will translate into an impact on participation in volunteering going forward. This suggests a need to ensure that the right tools are in place to support local organisations to use the interest generated by the Games as an opportunity to recruit new volunteers.

- **Reinforcing the brand can happen in a variety of ways.** The communications work undertaken by LOCOG and the various nationwide publicity and marketing campaigns by broadcasters, sponsors and other partners helped to reinforce and emphasise London's role as host city, building interest amongst the entire UK population and creating a sense of anticipation and excitement about the Games being staged in this country. The Olympic Games Opening Ceremony was a celebration of Britain's history and culture, helping to foster a sense of national pride and also reinforce the status of the UK as the host nation. The ceremony was met with a positive response and offers a lesson in how the Games provide an opportunity to raise the profile of the nation beyond the host city. The Games were widely portrayed in the media as a great success and this is believed to have impacted on the perceptions of the public and decision-makers as to the strong capability of London and the UK more widely as a venue for major events. The strong performance of Team GB and Paralympics GB also contributed to creating enthusiasm, along with a sense of pride in the UK's achievements, and also added to the development of the host nation brand.
- Creation of a strong brand is an important step in building the profile of the Games and establishing a unique identity for the host city. It is also important in terms of creating a sense of anticipation and encouraging civic participation prior to the event which is

beneficial to the profile of the host city and nation as a whole. It is recognised that large-scale publicity campaigns are largely in the hands of commercial sponsors or supporters of the event, although the strength of the campaigns associated with London 2012 may help to inspire campaigns for future major events.

(ii) Securing national co-ordination and communication

Plans for a community engagement legacy, as set out by successive governments, can be divided into a range of sub-themes, each containing a range of different activities/ interventions which were planned and delivered by various organisations.

- **Bodies responsible for co-ordination require a clear remit and accountabilities.** Securing co-ordination and communication to deliver community engagement benefits is a considerable task, requiring clarity and ownership. This lesson from the London Games is one gained from a perceived lost opportunity to plan its social legacy. During planning for the Games, a social legacy board was convened to discuss and plan the overarching social legacy of the 2012 Games³⁰⁹; however, the status of this group was not clear and there is no evidence of it taking a proactive approach to developing such a legacy.
- **Co-ordination is most successful when all stakeholders are involved and integrated into delivery.** An example of a successful approach to co-ordination from the 2012 Games was the Cultural Olympiad. Though the initiative started in 2008, key stakeholders formed a Cultural Olympiad Board in 2010 to oversee management of the whole programme. This was considered to be a unique partnership/collaboration of funders and major cultural institutions. The board appointed a director who led the development of the London 2012 Festival. The Cultural Olympiad Board became a sub-committee of the LOCOG Board and this helped to put culture more firmly on the agenda within LOCOG and provided focus and direction. These steps were felt to have strongly contributed to the successful delivery of the programme with resulting benefits for community engagement and participation across the country.
- **A lack of integration can result in missed opportunities, both in delivery and in legacy.** There were numerous volunteering programmes set up to support delivery of the Games, most notably the Games Maker programme but also host city programmes (which sought to recruit volunteers in the other cities which were home to Games venues). There appeared to be no systematic coordination across these programmes and some felt that this was a missed opportunity to create a unified and integrated approach, with potential for economies of scale to be realised.
- **Post-Games communications need to be planned for in advance to ensure a sustainable legacy.** Communication regarding legacy activity post-Games and future plans (for example, the activity planned by Join In for 2013) is also important and steps need to be taken to ensure this happens in a timely fashion. Some stakeholders perceived that there hadn't been enough communication after the Games, particularly regarding contact with Games Makers, and there was concern from some quarters that a 'window of opportunity' was being missed.

(iii) Strengthening (national and local) delivery infrastructure, including in communities and schools

In order to maximise community legacy benefits of mega-events, efforts must reach from the national, to the regional and to the local levels. The lessons around strengthening delivery infrastructure at all three levels touch on co-ordination, making the most of existing infrastructure and the need for long-term planning.

³⁰⁹ As originally set out by the previous Government; however, the incoming Coalition Government redefined this as the community engagement theme.

- **Having a sub-national structure can be helpful in securing engagement with and benefits for other parts of the country.** Delivery of legacy benefits is a complex and challenging undertaking. A sub-national structure can help to ensure efforts are coordinated and communicated in a consistent manner across varying geographies. For the 2012 Games, the Nations and Regions Group (NRG) played a key coordination and communication role across the country which was critical to meeting the objective of ensuring communities across the UK were engaged with the Games.
- **Educational infrastructure can be a useful mechanism for engaging children and young people.** Get Set provided resources which were readily accessible by schools across the UK. Following the Games, it was announced that the British Olympic Association (BOA) and British Paralympic Association (BPA) were going to continue the programme. This means resources will continue to be available and there will be a means of ongoing contact and communication with participating schools, although given the strong focus of the Get Set website and resources which were produced by LOCOG on the themes of the Olympic and Paralympic Games and associated values, some of the material may need to be refocused in order to ensure it remains relevant and sustains interest post London 2012.
- **Maximising the opportunity to strengthen volunteering infrastructure requires an integrated and long-term plan.** Major events are a valuable means of promoting volunteering, thereby increasing interest in volunteering within the general population; however, it is important to consider how best to draw on, and build the capacity of, the existing volunteering infrastructure when designing new volunteer programmes. Prior to the Games, funding was provided for the Inspiration and Legacy project which aimed to develop volunteering infrastructure, including development of the Do It website (which helps potential volunteers to search for available opportunities) and engagement with the sector to encourage an increased supply of good quality volunteering opportunities. This project ended in 2011, yet stakeholders feel there is a continued need to support the volunteering sector, particularly with regards to how the sector can capitalise on the increased interest in and profile of volunteering which occurred as a result of the Games.
- **Opportunities for sustaining successful engagement can be lost in the post-event transition.** London's Games Makers were an enthusiastic group of volunteers; however, there was some concern from stakeholders about a gap in communication with Games Makers about ongoing volunteering opportunities while the future of the contact database was determined. While the legacy vision was for the Games to provide a platform for encouraging volunteering behaviour going forward, the lack of clarity regarding ownership and handover of participant volunteers' details to other organisations after the Games precluded a smooth transition from Games-time volunteering arrangements to those post-Games.

(iv) Sustaining involvement and cohesion benefits (including amongst disabled people)

The 2012 Games are considered to have been a great success in involving and engaging communities up and down the UK. It is felt that the unique status of the Games as a global event of significant scale is part of the reason for this level of engagement; however, it is not just this special status that has resulted in lessons which can inform how future host cities seek to sustain community engagement post-Games.

- **The possibility of a limited window of opportunity to secure sustainable benefits.** It is anticipated by some that the "feel good factor" created by the Games may provide only a short period within which to ensure sustainable engagement at a significant level. The one year anniversary of the Games is seen as an opportunity to re-ignite some of the memories to continue to build on the success of the Games. An expanded programme for the Join In initiative is timed to coincide with the one year anniversary of the opening of the Olympic Games with the aim of achieving heightened engagement.
- **Games-time volunteering success does not necessarily translate into long-term increases in participation.** A key issue raised by stakeholders is the extent to which it will be possible to encourage Games-time volunteers to take up volunteering roles in their local

community. The unique and high profile nature of the Games meant that the associated volunteer roles were very different to those which might be available locally. There is concern that the increase in interest in volunteering will focus on opportunities provided by major events rather than community organisations and will not translate into a long-term increase in participation. One possible route to addressing this would be to consider how to best support the voluntary sector to integrate Games-time volunteers into more local activity.

- **Successful delivery at Games-time can raise expectations for post-Games delivery of community activities and benefits.** Opportunities for everyone to engage in cultural, sporting and other activities during the Games, provided in part through additional resources being made available, can raise expectations for what is delivered after the Games. Project and programme sponsors therefore need to define an exit strategy that is informed by anticipated public expectations and/ or consider ways of meeting those expectations once the Games are over and resources possibly re-allocated. For example, the Cultural Olympiad secured extensive engagement and was considered to have been successful as a way to help people throughout the country to feel part of the Games. Given the more modest resources which are likely to be available for cultural activity going forward, stakeholders felt that the public sector organisations involved in developing the cultural programme should have come together to consider ways of meeting public expectations going forward. For example, by negotiating ongoing relationships with private sector sponsors/ funders for an ongoing programme of cultural activity after the Games.
- **Sharing good practice is key to maximising benefits.** In order to maximise the inclusion and diversity benefits and lessons resulting from the Games, and in particular the efforts to widen access to volunteering and cultural opportunities for disabled people, there is a need to ensure that good practice is identified and disseminated so that others can learn from the approach taken and continue to develop this. For example, the Games Maker programme worked to increase access for disabled people by consulting with relevant stakeholders (e.g. disability groups) in designing and planning the programme, considering accessibility requirements and maximising opportunities for engagement by using relevant marketing channels.

East London

7.5 What lessons can be learned by host cities and countries in terms of how to maximise the regeneration benefits from mega-events?

The commitments made in London's bid for the 2012 Games established regeneration in East London as one of the central pillars of the Games' legacy. The experience of delivering physical, social and economic change in East London through the Games offers important lessons and guidance to other host cities and countries seeking to maximise the regeneration benefits possible from mega-events. London's experience provides guidance touching on a variety of areas, including ways of organising and coordinating, venue design and construction, community involvement and extending regeneration benefits beyond the area of focus.

(i) Partnership working and coordination across a diverse range of stakeholders and interests

In terms partnership working and coordination the following lessons were identified:

- **The importance of cross party political commitment to the Games**, and in particular the need to for the Games to deliver regeneration benefits within East London. It was noted by a number of stakeholders that Ken Livingstone, the Mayor of London at both the time the decision was made to bid and when London was awarded the right to host the Games, was a principle advocate of the Games because of the important catalytic role they could play in both regenerating part of East London as well as accommodating growth within the capital's borders. This advocacy and commitment to using the Games to drive forward and achieve London's wider objectives remained despite a change in Mayor in 2008 with the

election of Boris Johnson. In parallel, commitment to the Games at the national level did not waver following a change in Government in 2010.

- This consistent, long-term political leadership was thought by stakeholders to have prevented potentially unnecessary distractions and precluded the Games being used for political purposes. A number of stakeholders highlighted the quality of the hand-overs between politicians which were driven by a common desire to deliver a successful Games. For Government, this enabled new ministers to be fully aware of the status of Games preparations from the moment they assumed office and prevented the need to use the limited time available to familiarise themselves with the issues at hand.
- **The value of aligning national, regional and local government priorities.** Stakeholders noted this alignment was supported by a shared understanding of a common agenda and resulted in close partnership working between different agencies that would not normally work together and a willingness to work across normal (i.e. *"business as usual"*) boundaries in a cohesive way. In addition, the value of having a Mayor as an *"intermediate tier"* between national and local government was also noted by a number of stakeholders as particularly valuable for London because it enabled national and local priorities in relation to the Games to be balanced.
 - The joint working of the host boroughs was viewed by stakeholders as a successful example of sub-regional cooperation. From the outset of the bidding process, the host boroughs formed a unique Joint Planning Authorities Team (JPAT) to manage and agree planning applications in relation to the Olympic Park site. The boroughs coordinated to offer joint services in relevant areas such as regulation and building control. They also agreed a common legacy agenda around Convergence.
- **Real clarity around what individual organisations were responsible for.** It was this clarity which stakeholders noted ensured clear accountability. However, it also presented a two-fold challenge:
 - Individual organisations needed to ensure they maintained a balanced approach, taking into consideration the strategic issues and concerns of the wider area and partners, while also responding to the most relevant local concerns related to the wider strategic objectives; and
 - At the same time, they had to strike the right balance between working as one and working separately to focus on and ensure that organisational specific needs and opportunities resulting from the Games were maximised.

Again, stakeholders pointed to the host boroughs as a model of how this worked effectively in practice, as the boroughs not only signed up to and shared responsibility for a common regeneration agenda, they also individually focused on particular priorities that were most pertinent to their area. For example, Newham prioritised ensuring the employment opportunities for local residents resulting from the Games were maximised, while Greenwich sought to realise the tourism legacy for the borough and revitalising its town centres.

(ii) Planning and delivering sustainable venues and communities

With regard to maximising the regeneration benefits from mega-events by planning and delivering sustainable venues and communities, the following lessons can be learnt:

- **The value of one site and a clarity of purpose for that site.** Levering investment in East London as a direct result of the Games in order to drive regeneration and realign the growth of East London with the rest of London was a shared agenda for legacy activities in this area. As noted above, the regeneration objectives for the Games existed from the bid stage and shaped various planning and delivery decisions. As a result, planning and delivery were continually informed by the dual need to deliver the Games for one month in the summer of 2012 but also to deliver venues of value and provide a place for communities over the longer term.

- **The need to invest in quality project management and delivery processes.** The recruitment of high calibre leadership and capable teams open to working together in a flexible way ensured delivery was undertaken to the highest standard and supported by the necessary tools and processes appropriate to the scale of the task. A number of stakeholders noted that one of the critical success factors in relation to the delivery of the Games was that experts were recruited to oversee the implementation of different stages of the Games (i.e. preparation, delivery, legacy). Importantly, in many cases, these individuals were members of organisations which reviewed, restructured, up-scaled their teams, and in some instances created altogether new ones, to deliver different phases of the project at different times. In the words of one stakeholder there was "*continual reinvention of organisations to reflect what the project demanded*".
- **The importance of a building permanent venues to a high quality while also maximising the value of temporary venues.** It was acknowledged early on in the process of planning for the Games that some venues would be useful for communities after the event and others would not be. As a result, those venues which would be used in legacy were identified early on and steps taken to ensure they were built to a high standard – often exemplifying the latest and best techniques and standards – to provide solid foundations on which the legacy work could build. However, for those venues where it was deemed that legacy uses were limited or that community benefits were marginal, temporary structures were used. This ensured that the potential for 'white elephants' was removed, avoiding communities and local authorities being saddled with the responsibility of managing an unsustainable asset.
- **The importance of planning and preparation and the need for a clear legacy vision at the outset.** Ideally those accountable for the longer term legacy should be involved in this process from as early a point as possible. Where this worked well for the 2012 Games, it enabled design decisions to be influenced so that the venues and the Park could be designed in a way that maximises the benefits for the longer term. While legacy planning was ingrained in the Games from an early stage, a number of consultees did note that the delay in creating a body responsible for championing legacy did mean that for some venues (such as the Stadium and Press and Broadcast Centre), the legacy uses could not be as fully thought through and planned as early as many would have been liked.
- **The need to plan ahead but also to remain flexible and to be able to change plans.** The most striking example of the need for flexibility was in the delivery model for the Games themselves and the need for that model to adapt to the wider economic context. The model was originally designed (when the bid was won) at a time of economic growth and prosperity and therefore included assumptions about both what would be possible and how the delivery could be financed appropriate to that context. However, much of the activity was delivered at a time of recession which raised distinct delivery considerations, such as the need to identify different financing options than were originally anticipated.
- **The practicality of delivering the Games as the key driver.** The need to first and foremost complete preparations and deliver the Games meant that legacy was not and nor could always be the only focus and driver of decisions. The stadium was often cited by stakeholders as the primary example of this challenge, as it would not have been feasible to have done a deal with a football club in time for the stadium to be built and ready for the Games. Therefore, the decision was taken to build the stadium without an end user, even if it meant resources (i.e. time and money) were not put to best use.

(iii) The involvement and advancement of local communities (and different groups within the community)

In terms of the involvement and advancement of local communities in order to maximise the regeneration benefits from mega-events, the lessons include:

- **The challenges of engaging the community in shaping the Olympic Park (for Games-time) early on.** Stakeholders identified two reasons why this challenge existed. The first was that the Olympic Park was a difficult space "*to get to grips with*", largely because of its fragmented nature and inaccessibility. The second was because Games-time

requirements and the need to deliver the Games limited the extent to which local communities could influence the Park's design. It should be noted, however, that levels of engagement with the community were notably improved for the legacy master plans.

- **The importance of strong relationships between those responsible for delivering the Games and the third sector.** Good relationships were thought to have helped support the engagement of local people in both the planning process and in the delivery of activities locally. For example, the View Tube was a social enterprise and community venue set up prior to the Games on land adjacent to the Olympic Park to provide a viewing gallery, education and arts facilities and a café. Pre-Games it was a significant attraction and focal point for the local communities, so much so that it is being maintained in legacy.
- **The value of a system of measurement to enable progress and the advancement of the local community to be assessed year on year.** The creation of the Convergence indicators not only helped to articulate the shared vision for the Games across the host boroughs (as noted above), the indicators also provide a process by which progress can be measured post-Games and therefore helped to ensure that the focus remains on legacy over the medium to longer term.

(iv) Harnessing and diffusing social, economic and organisational benefits beyond the site and local area

The lessons learnt around harnessing social, economic and organisation benefits beyond the site and immediate local area in order to maximise the regeneration benefits from mega-events include:

- **The importance of fitting and aligning the Games with wider plans for regeneration and development.** This was particularly true for the London Plan which identified the need to accommodate growth within London's borders, sought to focus development on brownfield land, identified the need for new investment in transport and set out the objective to bring Stratford forward as a new metropolitan centre. As a result, stakeholders were of the opinion that London had an existing narrative around East London, the implementation of which the Games helped accelerate. One stakeholder noted *"mega events are most likely to be helpful if you already have a strategy and timescale for change"*.
- **The significant amount of work required to realise the regeneration benefits.** A notable number of stakeholders cited the amount of work and resource that went into ensuring that local unemployed residents had the necessary skills to access the employment opportunities resulting from the Games. It was acknowledged that the benefit of the Games was not just the number of jobs it provided but also – and perhaps more significantly – the nature of the jobs (e.g. retail and customer service) which made it easier to ensure that local residents had the necessary skills for the available positions. The Games also provided a valuable hook to raise local people's aspirations and to inspire them to explore employment opportunities. This meant that even if Games-time roles were not secured, the beneficiaries of the employment, skills and training programmes increased their likelihood of finding employment in the future and once the Games had finished.
- **The importance of identifying and targeting benefits that best fit with wider objectives and aspirations of the community.** In noting the link between identifying and prioritising benefits that will best fit, a number of stakeholders highlighted how the individual host boroughs targeted different benefits. As noted above, the Borough of Newham's focus was on employment benefits, while that of Greenwich was on catalysing its tourism offer.

(v) To what extent have these lessons been disseminated across the UK and internationally?

At the time of writing it was not possible to assess the extent to which these lessons have been disseminated across the UK and internationally.

8 Headline and Cross-Cutting Research Questions

8.1 Introduction

This section seeks to draw together the findings discussed in the preceding chapters by way of conclusion. It begins by providing answers to the four headline research questions (one for each theme), before looking in turn at six cross cutting questions (exploring areas that cut across the individual themes) and three concluding questions.

Headline research questions

8.2 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?

The Government has made a commitment to "*harnessing the United Kingdom's passion for sport to increase school-based and grass roots participation in competitive sport – and to encourage the whole population to be more physically active*".³¹⁰ This has resulted in sport legacy objectives focused on increasing sport and physical activity participation, providing the infrastructure (facilities and people) to support and sustain increased participation and to develop and sustain a world class high performance/ elite system.

Evidence indicates that the Games have resulted in a sporting legacy, with legacy participation programmes creating hundreds of thousands of sport participation opportunities for people of all ages and investment in infrastructure creating a foundation to increase and support increased participation. The Games have also acted as a motivator for people to do more sport. Investment in elite sport has created a sustainable high performance system, with performance at London 2012 exceeding expectations.

Impacts of the Games on sport is discussed under the following three categories:

- Mass participation;
- Competitive school sport; and
- Elite sport.

(i) Mass participation

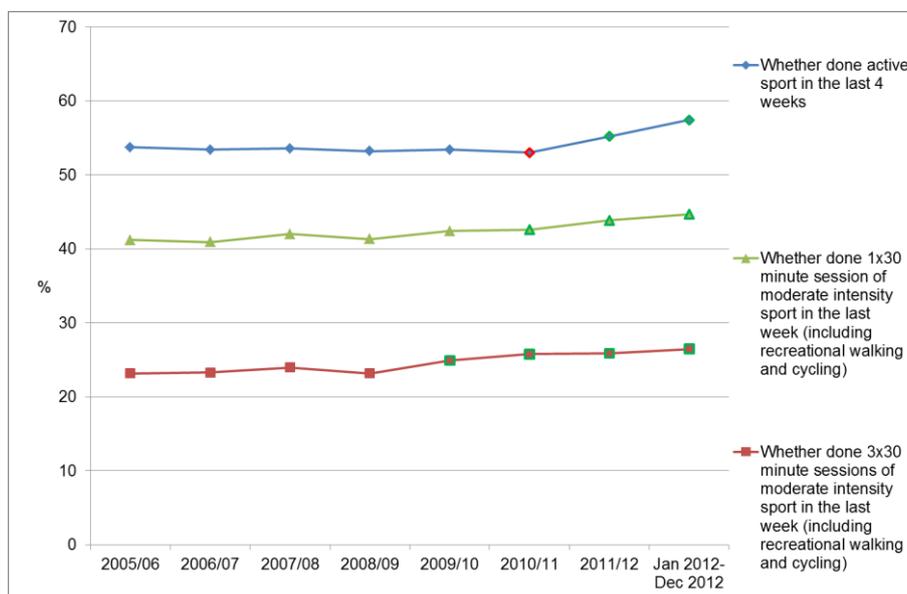
Increases in mass sports participation have been recorded for all demographic groups, including the specific target groups of women, disabled people and black and minority ethnic groups. Both Taking Part and Active People indicate that participation has increased since 2005/6:

- Taking Part data indicates that the proportion of adults participating in at least one 30 minute session of moderate intensity sport (including recreational walking and cycling) in the last week has increased by 3.5 percentage points in 2012 since 2005/6, equivalent to 1.5 million more participants (Figure 8-1); and

³¹⁰ Hansard, Written Ministerial Statement by The Secretary of State for Culture, Olympics, Media and Sport on the Olympic and Paralympic Games Legacy, 20th December 2010

- Active People recorded an increase in the proportion of adults doing at least 1x30 minute session of moderate intensity sport³¹¹ in the last week of 1.8 percentage points from October 2005-October 2006 to October 2011-October 2012.

Figure 8-1: Frequency of adult participation in sport in England, 2005/06-January to December 2012



Source: *Taking Part*

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

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

Evidence indicates that the Games have contributed to this increase in sports participation in a number of ways.

There has been significant investment in participation programmes and infrastructure, both facilities and soft infrastructure, to facilitate and sustain an increase in participation.

The legacy participation programmes of Gold Challenge, Sportivate, Inspire, Change 4 Life Sports Clubs, Premier League 4 Sport, Walk 4 Life and Free Swimming have created hundreds of thousands of participation opportunities, with signs thus far indicating that participation may be sustainable. Furthermore, through the funding and focus provided by the Whole Sport Plans, National Governing Bodies (NGBs) have provided participation opportunities and infrastructure to capture and build on the interest generated by the Games.

When investments in the Olympic venues and Places People Play infrastructure strands (Iconic Facilities, Inspired Facilities and Protecting Playing Fields) are realised, sport participation opportunities for millions of people will be facilitated. In addition, the impact of investment in infrastructure on participation was noted by respondents to the PGTC Survey³¹² who reported an increase in participation at venues which hosted PGTCs.

The Games have been found to have acted as a motivator for participation.³¹³ Data for the 2012 calendar year show that 15.3% of adults are either motivated to do more sport or more interested in sport because of the UK hosting the Games, namely:

³¹¹ This excludes recreational walking and cycling and is thus lower than the Taking Part measure.

³¹² Department for Culture, Media & Sport (2013) *Pre-Games Training Camp Survey* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base Annex C*)

³¹³ Question: Has the UK hosting the 2012 Olympics motivated you to do more sport or recreational physical activity?

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

Econometric analysis³¹⁴ using monthly Taking Part survey data explored the extent to which the Games could be responsible for increases in participation and showed strong evidence that Games motivation led to participation, as expected. However, there was also some evidence of a reinforcing effect where participation would in turn lead to greater motivation. Given the significant increase in motivation around the Games, this further points to the Games having positively impacted participation in sport and physical activity in a substantial way.

Given the significant investment in legacy participation programmes and infrastructure, including both facilities and people, and with the Games acting as a motivator for increased sport and physical activity participation, we can conclude that the Games has contributed to the observed increased levels of sport participation.

(ii) Competitive school sport

Competitive school sport participation levels are high, with the latest Taking Part survey data on competitive sport³¹⁵ showing that from October 2011 to September 2012, 81.6% of 5 to 15 year old children reported they had done some form of competitive sport in the last 12 months (both inside and outside of school).

School Games is the key competitive school sport legacy programme and although the impacts of this on participation are yet to be determined, an interim evaluation³¹⁶ of the first year of the School Games indicates "*a successful first year of delivery, with significant enhancements to connectivity between levels and improvements to county events reported throughout the course of the year*". In addition, the evaluation reported a greater number of opportunities encompassing a wide range of sports.

In March 2013 the Government announced a £150 million a year investment for the next two years in school sport and PE to primary schools. This funding, which is in addition to School Games, will be ring fenced, and will be allocated directly to primary schools across England with the schools to determine the most appropriate use of this funding for school sport and PE related activities. It will be allocated through a lump sum for each school and a per-pupil top-up mechanism – a typical primary school with 250 pupils will receive around £9,250 each year. This funding is as a result of the Games, with investment in school sport seen as a critical sporting legacy.

School Games is establishing a system through which additional and better quality competitive school sport opportunities can be created to support already high levels of participation. Given that School Games runs until 2015, and with the further investment in primary school sports provision, young people will continue to be provided with competitive school sport opportunities and impacts as a result of the Games will continue to be realised beyond 2012.

(iii) Elite Sport

The key measure of elite sport achievement is medal success and with a successful performance at the 2012 Games it can be concluded that the Games were a significant catalyst for achievement in elite sport:

- UK Sport set medal targets of between 40 and 70 medals for the 2012 Olympic Games and 95 to 145 for the Paralympic Games. Performance at both considerably exceeded the

³¹⁴ Dr. Paul Downward, Dr. Peter Dawson and Professor Terrence Mills (2013) *The Impact of the Olympic Games on Sport Participation, Motivation, Health and Well-Being* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base*)

³¹⁵ Data is split into data into 'in school' and 'out of school' activities for both 5 to 10 year olds and for 11 to 15 year olds.

³¹⁶ Sport Industry Research, Centre Sheffield Hallam University (August 2012) *School Games, Executive Summary, Year 1*

minimum target. Outcomes were towards the mid to upper target range, with 65 medals won in the Olympic events and 120 in the Paralympic events.

- UK Sport also set itself a target of finishing in fourth place in the Olympic medal table and second in the Paralympic table. Team GB exceeded this target finishing third, with 20 of the 28 Olympic sports achieving or exceeding their targets. Although Paralympics GB finished third, one place below the target of second, there has been significant movement of the top ten countries (notably China, Russia and Ukraine) and thus maintaining a top three place in the Paralympic table is viewed by stakeholders as a successful outcome.

The various policy elements which impact on the elite sport system in Great Britain, although in place prior to the 2003 baseline, were all enhanced in important ways in the years immediately prior to 2012. This was facilitated by the extra financial resources provided, most noticeably additional exchequer funding of £200m in 2006, which was a direct result of winning the right to host the Games. This allowed investment in a range of programmes and initiatives to support elite sport performance including:

- Talent identification and development;
- Athletic and post-athletic career support;
- Elite coach and leadership development;
- International competition; and
- Scientific research.

Britain's improved position on the Olympics medal table and continued good performance in the Paralympics can be reasonably attributed to the actions undertaken as a product of the enhanced funding and focus from hosting the Games.

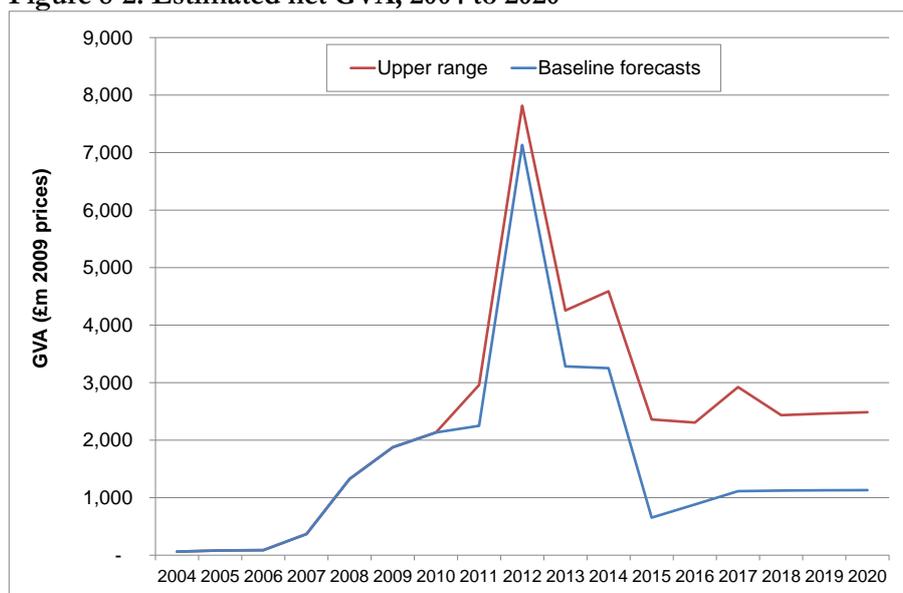
With similar levels of funding allocated to the end of the Rio funding cycle (2013 to 2017), Great Britain should be in a position to resource and refine elite sporting initiatives, including for example talent identification and coaching, in the ambitious aspiration to improve on its London medal performance. Performance in Rio in 2016 will however be important in determining the extent to which the impact on elite sport has been sustained.

8.3 What have been the economic impacts of the Games, particularly in terms of employment and gross value added (GVA)?

The Games and related economic legacy initiatives have provided a significant counter to the effects of the economic downturn and will contribute to longer term economic growth. The following sub-sections consider evidence related to the measurable impacts of the Games, the various types of economic impacts that have been generated to date and the potential longer-term impacts.

(i) Overall measurable impacts

Bespoke economic modelling utilising an input-output based approach suggests that the impacts which can already be clearly identified at this early stage will in total generate between £28 billion and £41 billion in GVA and between 618,000 and 893,000 years of employment by 2020. These estimates take account of the spread of impacts down the supply chain and the induced effects on consumers' expenditure of the associated boost to employees' personal incomes. The figures up to the end of 2012 have already been realised and have a high degree of confidence. There is always inherent uncertainty around future impacts and as such a range of potential impacts is presented to reflect the extent to which they may materialise, could displace other activity, or might have happened in the absence of the Games. This overall assessment is based on estimates of the impact from Games-related spending, tourism, public and private sector investments in East London and some initial estimates of the effects on trade and inward investment. The impacts include getting an estimated 62,000 to 76,000 people off worklessness in London on a permanent or temporary basis.

Figure 8-2: Estimated net GVA, 2004 to 2020

Source: Oxford Economics (2013) *London 2012 Olympic and Paralympic Games – Economic Modelling* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex A*)

(ii) Impacts of Games-related spending

Underpinning these impacts is the boost to demand from the £8.9 billion Public Sector Funding Package and the additional £2 billion of privately financed spending by the London Organising Committee of the Olympic and Paralympic Games (LOCOG)

The model estimates that in the period between 2004 and 2014 this spend resulted in nearly £12.5 billion of GVA (£2009 prices) and approximately 291,000 job years of employment in the UK. The construction of the Olympic Park in particular provided a major stimulus to the construction sector at a time when it had been hard hit by the recession. The Administrative and Support sector also derived substantial benefits but all sectors derived some benefit, with manufacturing seeing significant supply chain impacts.

The economic benefits of this stimulus have also been experienced by all regions and nations, in part because of initiatives such as CompeteFor which were specifically established to open up the opportunities to bid for Games contracts to the widest possible range of businesses.

There is further potential for the delivery of Games contracts to create a legacy of enhanced capacity and expertise for UK businesses. A series of surveys which examined the impact of Games contracts on UK businesses provided qualitative indications of some of the other longer-term benefits that may emerge. The surveys identified some positive impacts on innovation and skills as well as reputational benefits that can be built on in the longer-term. The evidence also points towards some early successes for the construction sector in terms of using Games experience to secure further work. The enhanced capacity and expertise of UK businesses associated with the delivery of Games contracts can continue to provide benefits to the UK economy over the next few years.

A common issue identified by stakeholders was the IOC marketing restriction which was in place to ensure businesses working on the Games did not promote themselves in a way that undermined the rights of the official London 2012 and Olympic sponsors. However, there is limited evidence on the extent to which the International Olympic Committee's (IOC) marketing clause has constrained UK businesses in building on their Games role and stakeholder views are mixed on whether the advertising clause has hindered businesses. In response to these concerns the British Olympic Association (BOA) has since negotiated a limited licence arrangement with the IOC which allows for a particular form of words to be

used in advertising the role in the Games and as of May 2013, 644 companies had been approved for a license to use the scheme.³¹⁷

(iii) Impacts on the visitor economy

The 2012 Games provided an opportunity to stimulate overseas and domestic tourism not only in 2012 through visits to the sports and cultural events but particularly over the longer term, by using the Games to showcase London and the UK. Drawing on a range of evidence sources it is estimated that the net impact of the Games on the tourism industry in the UK in 2012 was £890 million, or £598 million if spending on Games tickets is excluded. Despite numbers of overseas visitors actually falling in the Summer of 2012 compared to the previous year, higher spending by those attending the Games compared to those who would normally have come during this period will have generated positive net impacts on GVA.

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

The Games also had a substantial impact on the domestic tourism market. It is estimated that the additional contribution to the visitor economy (excluding ticket sales) was £184 million from domestic overnight visitors and £179 million from domestic day visitors. However, it is not possible to establish how far this expenditure was additional to the UK economy and how far it was diverted from other categories of spend.

The 2012 Games also provided an opportunity to secure longer-term increases in visitor numbers by using the Games and the media coverage around it to showcase London and the UK as leisure tourism destinations. Initial results on the impact of the Games on perceptions are encouraging. Research undertaken by Visit Britain shows the 2012 Games had a positive effect on the UK's nation brand. Between the Pre Games and Post Games surveys Britain moved up one place in the Nations Brand Index to be ranked fourth out of 50 major countries around the world. As nation brands are very stable and no dramatic changes were expected, even a small change can be regarded as a positive effect.

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

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

(iv) Trade and investment

A key component of the economic legacy of the Games comes from trade and inward investment that has been secured because of the Games and the related promotional activity. The Government adopted a target of securing £11 billion of benefits by 2016, using events such as the British Business Embassy and overseas campaigns such as GREAT, and £10 billion of this has already been delivered: £2.5 billion of inward investment; £5.9 billion in additional sales for UK companies have been generated as a result of Games-related export promotion

³¹⁷ British Olympic Association

activities; and contracts totalling £1.5 billion have been won through the Government's Games-related High Value Opportunities programme.

Drawing on a range of evidence sources it can be concluded that there is considerable potential for the Games to impact on inward investment in the longer-term. Case studies of inward investment projects completed for the meta-evaluation provide illustrative evidence on how the Games and the events around them have helped to influence inward investment projects. The case studies also show how the Games contributed to enhanced perceptions of the UK as a place to invest and helped to instil confidence in the companies regarding the future prospects for their UK operations.

There is also evaluation evidence to suggest that Foreign and Commonwealth Office (FCO) diplomacy campaigns used the Games effectively to enhance the reputation of UK businesses abroad, which should help UK businesses in accessing new export markets in the future. Case studies provide illustrative evidence on how UKTI has used the Games and the events around it to help UK businesses access new export markets.

(v) Other ongoing and longer-term impacts

The evaluation evidence has identified a number of other ways in which the Games can generate a substantial on-going economic legacy. These include: using the Games to give people access to employment and/or training; wider efficiency benefits from Games-related initiatives; and through industry taking-up lessons on resource efficiency from good practice approaches adopted in the preparation and staging of the Games.

The Games represented a one-off opportunity to provide workless people with a pathway to sustainable employment. Evaluation evidence estimates lower and upper bound gross figures of 61,749 and 76,050 previously workless Londoners securing Games related employment. It is not clear how far these people would have found work anyway. However there are potentially significant longer-term impacts from effectively reengaging previously workless people within the labour force. Further positive effects on employability and earnings can be expected from the development of workforce skills which took place.

The evidence has illustrated the possible wider efficiency benefits from Games-related initiatives, including the impacts of the CompeteFor legacy programme on capacity and expertise, changes in working practices by London businesses brought about by the Games, as well as the improvements to London's transport system.

Overall the evidence indicates that both the Olympic Delivery Authority (ODA) and the London Organising Committee of the Olympic and Paralympic Games (LOCOG) performed strongly in relation to delivering a sustainable Games. The ODA and LOCOG have both produced a comprehensive suite of learning legacy material that provides a detailed account of the key elements of sustainability good practice. The evidence highlights the potential competitiveness and resource efficiency benefits which can be secured from the diffusion of this good practice. Case studies and qualitative evidence demonstrate that significant progress has been made in sharing lessons from the Games particularly within the construction and events industries.

8.4 What have been the social impacts of the Games, particularly in terms of volunteering, the cultural sector and community engagement?

The Games and related activity was used as a means to generate social benefits for communities across the UK with the intention that this would inspire more active, successful and cohesive communities. The following sub-sections consider the evidence related to the different behaviours which the Games has attempted to influence in order to achieve positive social impacts.

(i) Volunteering and community engagement

Encouraging and enabling people to play a more active part in society were key objectives of activity under the community engagement and participation legacy theme. The Games provided an increase in the number of opportunities for volunteering and other forms of social action

across the UK. This was met with an enthusiastic response from the general public and has encouraged the formation of social capital and also created a range of benefits for individual participants and their communities.

The Games played a direct role in motivating a high level of activity and events across the country which provided opportunities for communities to come together to celebrate the Games and/ or take part in related activity such as sport, games, arts and culture.

The significant number of volunteering opportunities related to Games attracted a high level of media coverage and public interest and stakeholders believe that this has helped to raise the profile and change the image of volunteering in a positive way, including challenging traditional stereotypes of the type of people who volunteer and the roles they undertake. Research suggests the Games-time volunteering roles appealed to both new and existing volunteers and the uniqueness of the Games itself was the primary motivating factor for many of those who took part; however, the high level of satisfaction gained by volunteers from their experience and the fact that the majority plan to either increase or maintain their pre-Games volunteering levels suggests that there should be some social legacy for communities.

Surveys of those who participated in Games-related activity recorded benefits to both individual volunteers, participants and their communities, and an increased motivation to get involved in community activity and/or volunteering. The positive influence of the Games specifically on volunteering is also reflected in national data which shows a small increase in participation in volunteering during the year of the Games and that the Games had a role in motivating further activity. However, further research will need to be undertaken to assess the extent to which these positive intentions to volunteer or get actively involved in the community in other ways are turned into reality.

It is clear that the Games have created an increased interest and momentum for volunteering and community involvement. Going forward, it will be important to build on this effect to ensure that the enthusiasm is not lost, including implementing plans to provide ongoing opportunities for Games-time volunteers at future events but also encouraging them to take up volunteering roles in their local communities. The Join In initiative has a role to play by encouraging people to get involved in local groups and there are plans for a programme of activity throughout summer 2013 in order to build on the achievements of the initial Join In weekend in August 2012.

(ii) Participation in culture

Engaging and inspiring the next generation of performers and audiences for the arts and culture was a key legacy objective to be met by providing an opportunity for everyone in the UK to celebrate London 2012 and, in doing so, leave a lasting legacy for culture and the arts across the UK. Providing opportunities for people to get involved in local activity is expected to encourage more active communities and by encouraging involvement and bringing people together the cultural programme has contributed positively on community cohesion.

The Cultural Olympiad provided an extensive and diverse programme of cultural activity, the ambition and scale of which reflected the significant resources which were made available to the programme, including contributions from both the public and private sectors, as well as lottery funding.

Activities took place in all parts of the UK and provided a means for people across the country to engage with and celebrate the excitement surrounding the Games. In total, the Cultural Olympiad generated over 43 million public engagements.³¹⁸ There is some evidence that organisations have been able to use Cultural Olympiad activity to attract new audiences, including those from under-represented groups, although this has clearly happened alongside the engagement of those who already had a high level of interest and involvement in culture.

³¹⁸ Note that this does not include Open Weekend or Inspire Mark. The estimate relates to the total number of engagements, which may include multiple engagements by specific individuals. It was not possible to estimate the number of unique individuals who engaged in some way.

Evidence from several sources has identified a range of benefits to participants and their communities, including practical and life skills development for individuals and recognition of wider benefits such as bringing communities together, helping to create a sense of place and feelings of pride at local and national levels.

Evidence from a number of sources suggests that the Cultural Olympiad is expected to have a positive effect in terms of inspiring people to take part in more cultural activity; however, as with volunteering, further research will be required to demonstrate whether these intentions are followed through and whether any impact on participation is sustained.

(iii) Engaging children and young people

At the bid stage, plans were set out for the Games and its values to be used as a means to inspire a generation to get involved with the Games, learn and develop, and achieve more, including by enhancing the opportunities available to children and young people, and promoting social inclusion.

The Games provided an opportunity to engage with many children and young people in all parts of the country. Get Set focused on the theme of the Olympic and Paralympic Values and provided a flexible programme of resources which could be applied to a range of subject areas. Take-up was high and teachers reported a range of positive outcomes in terms of both personal development and educational aspects. For some young people more intensive interventions were possible through programmes such as Young Leaders and Opportunity Inspired by 2012 which focused on encouraging progression to employment or education for those from disadvantaged backgrounds. More generally, there is evidence from research commissioned by the Legacy Trust UK that the Games provided an inspirational and motivational effect, although it is too early to tell whether this will translate into improved economic and social outcomes for young people later in life.

Following the Games it was announced that a partnership of the BOA and BPA would take Get Set forward to ensure that it continues to be available to schools across the UK. A new website providing a range of resources focused on the Olympic and Paralympic Values will help to ensure that this material continues to be available, and provides a continued legacy for children and young people.

Students at universities and colleges were engaged in significant numbers, for example by volunteering to support various aspects of the Games, including torch relays, ceremonies, test events, training camps and Games Makers. The institutions themselves also benefited from the creation of new partnerships, research opportunities and a chance to build their profile and reputation.

(iv) Encouraging sustainable living

The Games also provided an opportunity to inspire people to live more sustainably, for example by reducing their carbon footprint, being more energy efficient, making more sustainable travel choices and increasing the amount of waste recycled. By encouraging people to make a positive contribution to sustainable development, this type of activity will contribute to better local environments leading to improved resident satisfaction with local neighbourhoods which, in turn, contributes to the achievement of more active, successful and cohesive communities.

Significant effort was made to ensure that London 2012 was the greenest Games ever, including attempts to influence travel choices during Games-time and visible promotion of recycling at venues. The Active Travel programme was found to have been successful at influencing the behaviour of travellers during the Games and of visitors to venues; however, post-Games surveys show only a small number sustained change in travel behaviour with the majority of travel patterns having returned to normal. Where change had been sustained this was typically due to the alternative having been found to be preferable in some way to what had been done previously. Although the impact on regular journeys appears to have been limited, surveys also suggest that as a result of the experience of the Games some people (ranging from around one-quarter to one-third depending on the sample) report that they either intend to or

have been walking and cycling more which suggests some positive impact in terms of people being more aware and/or more open to the option of walking and cycling for some or part of their journeys as a result of the Games.

The Department for the Environment, Food and Rural Affairs (Defra) funded four projects aimed at encouraging people to live more sustainably by adopting behaviours related to energy and water efficiency, recycling and reuse, environmental volunteering and travel. These projects were successful in securing engagement and raising awareness of sustainability amongst their target audience. Evidence of behavioural change varied by project but there was some evidence to suggest that the work had motivated an increase in volunteering and encouraged some increase in recycling/ reuse, energy efficiency and water saving behaviours, although low survey response rates limited the extent to which this change could be robustly analysed.

However, it appears that projects found it more challenging to make a direct link between the Games and sustainability for individuals/ households than was the case for the other behaviours considered in this section (e.g. volunteering to support delivery of the Games and related activity). For example, the Games was found not to have been a significant motivating factor for those who engaged with the Defra funded projects and as a result the impact of the Games as a mechanism to inspire sustainable living appears to have been limited, although this should not detract from the achievements of these interventions which were able to find other ways to encourage engagement with this important topic.

In addition to these interventions, it is considered that more could have been done to promote the other, less visible sustainability features of the venues in order to encourage more interest and enthusiasm from the public on sustainability and maximise the opportunity to inspire wider behavioural change.

(v) Influencing attitudes towards disability

The Games provided an opportunity to influence attitudes towards and perceptions of disabled people in a number of ways, including encouraging comprehensive media coverage of the Paralympic Games, promoting inclusion and equality to ensure that Games-related opportunities were made available to all and improving understanding of disability amongst children and young people, in order to create a more equal and cohesive society.

Generally, the evidence shows some improvement in attitudes towards disability in recent years, with a number of measures on the British Social Attitudes Survey improving over the period 2005 to 2012.

Qualitative evidence in the build up to the Games showed a high expectation that the Paralympics coverage would positively influence attitudes towards disabled people. Evidence generally suggests an extremely positive effect on public attitudes towards disabled people during Games time. This was in part due to the highly praised Channel 4 coverage and the broad level of interest in the Paralympic coverage leading to a much greater level of coverage of disabled people during that time. Media content analysis shows that use of negatively worded descriptions of disabled people has been decreasing over time and use of positive/preferred terms increasing, and that during Games time there was a peak in the level of coverage of disabled people which used positive and empowering terminology.

The legacy of any longer term effect on public attitudes will require further tracking. Data from the British Social Attitudes Survey in 2012 showed that people's perception about the prejudice faced by disabled people in Britain varied, and the fluctuations do not indicate a pattern either of increasing or decreasing prejudice, but variance from wave to wave. However, over 40% of respondents indicated that they would have a more positive view of disabled people as a result of the Paralympic Games, although the majority felt that their view would remain the same (57%).

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

The full legacy impacts on the regeneration of East London will not fully emerge for a number of years. However, what is already apparent is that the planning and preparation for the Games, coupled with the early transformational activities post-Games, have already made a significant contribution to the physical transformation of East London.

Alongside the physical transformation that has been catalysed by the Games, the other most significant impact of the Games in terms of the regeneration of East London is the role that they have played in facilitating socio-economic change in East London through the provision of new economic opportunities and the creation of the new community infrastructure.

(i) Physical transformation

While plans for the redevelopment of Stratford existed prior to winning the right to host the Games in 2005, and the regeneration of East London was already very much part of London's wider plans for economic growth, based on the evidence available it can be concluded that the Games played an important catalytic role in driving forward the transformation of the Olympic Park site and its wider area of influence. The result of this is that without the Games the largely derelict, polluted and inaccessible site on which the Olympic Park was created would have remained for the foreseeable future.

This transformation began with a comprehensive programme of land acquisition, remediation and development that was first lead by the LDA and then, more significantly, by the ODA. This programme of activity quite literally laid the foundations for the creation of the Olympic Park for both Games-time as well as the longer term legacy. This process included the:

- Remediation and clean-up of 2.5 sq km of brownfield land;
- Demolition of more than 200 buildings;
- Undergrounding of 52 power pylons;
- Creation of a new utilities network to provide power, water and sanitation to the site;
- Creation of 100 hectares of greenspace;
- Planting of 4,000 semi-mature trees;
- Creation of the Athletes Village (which in legacy will be transformed into 2,818 homes);
- Creation of permanent sporting venues in East London including the Olympic Stadium, the Aquatics Centre, the Velodrome and associated cycle tracks, the Handball Arena, hockey pitches and tennis courts;
- Creation of 80,000 sq m of business space through the International Broadcast Centre/Main Press Centre (IBC/MPC); and
- Building more than 30 bridges and connections across the Olympic Park.

For some aspects of this physical change such as the creation of the permanent sporting venues, the transformation effect and benefits they will bring are wholly attributable to the Games, whereas for others the Games served as a significant catalyst to regeneration in East London. The evidence suggests that the additionality of the Games was particularly apparent in the role they played in creating both:

- A *"more comprehensive and joined up site"*³¹⁹, as it would have been unviable for the private sector to have brought forward a site of a similar scale which would have been subject to multiple ownerships; as well as

³¹⁹ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

- A more integrated timetable for regeneration. The Games ensured that there was both a firm and immovable deadline for delivery, while also 'protecting' the public and private sector investment in regeneration activities in this part of East London from spending cuts that affected a number of other major regeneration projects across the UK³²⁰.

Following the Games, and with the transfer of responsibility for the transformation of the Olympic Park from the ODA to the London Legacy Development Corporation (LLDC), work continues. The Park is in the process of being transformed from Games-time use to its legacy use as "*one of London's most dynamic urban districts*"³²¹. The transformation of these venues and the Olympic Park itself are currently well underway with some of the key legacy outputs beginning to become apparent from as early as mid- to late-2013.

The first of these will be the conversion of the Athletes' Village into 2,818 apartments and town houses – 1,379 of which will be social housing (managed by Triathlon Homes) with the remaining 1,439 private homes (managed by Qatari Diar/Delancey (QDD)), with the majority being private rental. This will be quickly followed by the conversion of the athlete's health centre into a community health centre and the conversion of Olympic Park Operations Centre into a new academy (Chobham Academy). Together, this activity will see the creation of 'East Village' and the first new community in the park.

The LLDC has also made significant progress since it took ownership of the Park following the end of the Games³²²:

- The transformation works have now commenced and are currently on schedule;
- All permanent venues now have permanent operators with the announcement of West Ham United FC as the operator of the Stadium;
- Planning consent was granted in September 2012 for the Legacy Communities Scheme which will see the creation 7,000 new homes, two primary schools, a secondary school, nine nurseries, three health centres, and a number of multi-purpose community, leisure and cultural spaces; and
- The North Park is scheduled to re-open on 29 July 2013 following a series of concerts and events and the South Park in Spring 2014.

The catalytic role of the Games is also apparent in the transformation of public transport in East London. The expected increase in passenger demand resulting from the Games coupled with the additional funding from the ODA to unlock planned investments meant that the Games were the primary driver in a number of TfL's plans being brought forward. This included a project to double the capacity of Stratford Station, upgrades to the Dockland Light Railway and upgrades to the North London Line. The permanent nature of these enhancements mean that they "*form a vital part of the wider Games Legacy*" as they significantly improve "*transport capacity and reliability*" across East London, and will do so "*for many years to come*"³²³.

The same is also true for the wider transformation of the public realm across East London with the Games again playing an important acceleration role (both in terms of timing and scale) of activity that was part of larger and longer-term development plans. The result of this was that the host boroughs implemented a joint programme of public realm capital schemes, valued at £190 million and comprising 71 projects, which were structured around 10 priority packages. This work included improvement to Hackney Wick and Fish Island, Greenwich Riverside and Town Centre and Stratford Town Centre. These improvements have made a positive contribution to the transformation of East London as a place beyond the Olympic Park.

³²⁰ PwC and SQW (2011) *2012 Games Legacy Impact Evaluation Study: Appendix A Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

³²¹ London Legacy Development Corporation (2013) *Three Year Business Plan 2013/14 – 2015/16*

³²² *Ibid*

³²³ Transport for London (2013) *Travel in London Report 5*

In addition, the evidence available also suggests that East London has experienced a number of wider regeneration benefits and effects. However, these do appear to currently be limited to Stratford and the immediate vicinity of the Olympic Park. The most notable impact to date has been the role that the Games played in bringing forward the Westfield development at Stratford City – and all the employment and economic benefits associated with it – by between five and seven years³²⁴. Stakeholders were also of the opinion that the Games was likely to have had a similar catalytic impact on Lend Lease's investment in the further development of the Stratford City site – the International Quarter. However, moving beyond the immediate vicinity of the Park and to Stratford the picture does become more blurry although it would appear that the impact of the Games is again catalytic, not least in the context of driving investment in development in a time of economic downturn.

In terms of other wider regeneration benefits, as yet there has been no immediate, notable impact on either commercial or residential land values in East London, although it may be that much of the impact on land values is still to be realised and the view of a number of consultees was that the re-opening of the Park may play an important role in driving this change.

(ii) Socio-economic impact

Given its scale and the nature of activities involved, the Games provided a real opportunity for East London to tackle the high levels of worklessness (particularly long term unemployment) and benefit dependency. In this, a key objective was to use the 2012 Games in East London as a hook to raise local people's aspirations by encouraging them to take advantage of both new and existing job opportunities, and by motivating young people through expanding local career options.

Drawing on a number of strong sources of evidence, it is clear that the preparation for and the staging of the 2012 Games did create a large number of job opportunities for local residents, for example:

- The demolition and build of the Olympic Park and Athletes' Village created in excess of 9,700 jobs for host borough residents³²⁵; and
- 1,951 host borough residents were employed by LOCOG as part of its Games-time workforce (55% of whom were previously unemployed) and 21,000 host borough residents were part of the Games-time contractor workforce in roles such as catering, retail and security³²⁶.

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

In terms of the creation of new community infrastructure, the transformation activities on the Olympic Park that the Games will deliver include:

- New homes, a significant proportion of which will be affordable (35% of the homes the LLDC will develop and 48% of the converted Athletes' Village);
- New leisure facilities including the Olympic sports venues themselves and the Olympic Park itself (which will offer 102 hectares of open space);

³²⁴ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

³²⁵ Olympic Delivery Authority data

³²⁶ London Organising Committee of the Olympic and Paralympic Games Employment & Skill and Games Time Recruitment Briefing Note

- New education facilities including two primary schools, one secondary school and nine nurseries. Alongside this, the University of East London and Birkbeck are opening a new campus in Stratford's cultural quarter in the autumn of 2013 and Loughborough University will open a campus in the converted broadcast centre (iCITY); and
- New health facilities including three health centres.

However, given that much of this infrastructure is being delivered over a longer timescale with some elements not being fully realised until 2030, it is not possible to comment on their impact, i.e. on the extent to which they have contributed to changing the socio-economic profile of the area. In the interim, the Host Boroughs Resident Survey does provide some insight into the extent to which the Games have already contributed to transforming the community in East London. Through this survey, it appears that regeneration of the area was important for a notable proportion of those who had moved into the borough within the last year which suggests that as the regeneration effects of the Games have become more visible they are yielding a bigger influence on mobility. Perceptions of East London are also changing with both the resident survey and the resident focus groups pointing to higher levels of satisfaction with the area as a place to live. In addition, media analysis suggests that perceptions of East London are moving away from an image of welfare, poverty and economic problems and towards one that is more focused on regeneration and investment.

However, ensuring that the new communities moving into the Park effectively integrate with the existing communities is a notable challenge that requires pro-active management. A 'them and us' culture is a significant risk. In order to prevent this from happening there is a need to breakdown a number of pre-conceived perceptions about who the Park is for; to ensure that there are both physical and social connections – not least that the edges of the Park are blurred and the communities of East London knitted together; and to ensure that the desire to integrate local communities translates across everything that happens on the Park from pricing to events to the layout of the housing.

That said, genuine socio-economic change in East London is a much longer term process and while good progress is being made on Convergence with the gap closing on 11 of the 18 indicators currently measured. It is not currently possible to assess how much this progress has been influenced and driven by the Games, particularly as the Games is only one part of a much wider regeneration story in East London. What is clear is that the Games did provide the impetus necessary to ensure that the six host boroughs approached regeneration and the potential for long-term sustainable socio-economic change in a more cohesive and collective way.

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

Cross-cutting

8.6 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; and

- The second is from the perspective of equality, inclusion and diversity and the extent to which the Games have benefited particular groups.

(i) Spatial benefits

In terms of the spatial distribution, it is apparent through the evidence available that the Games have benefited, to some degree, every nation and region. However, the distribution of these benefits has varied as a result of two factors. The first is the proximity to London and the second is the way in which different nations and regions embraced different parts of the Games experience. For example, the North West was very proactive in the work it did around sports participation, whereas the West Midlands were more proactive in its engagement with the Cultural Olympiad.

In headline terms every nation and region has enjoyed some economic benefit as a result of the Games (Figure 8-3). As could be expected, London enjoys the largest labour market benefit with nearly 138,720 gross job years of employment and £4,070 of GVA (at 2009 prices). The neighbouring regions of the South East and East of England also enjoyed significant benefits. Northern Ireland (perhaps given its geographical location and relative size) has the least estimated gross jobs impact but still has around 12,000 job years of employment.

Figure 8-3: Baseline Olympic related net benefits by region, 2004 to 2020

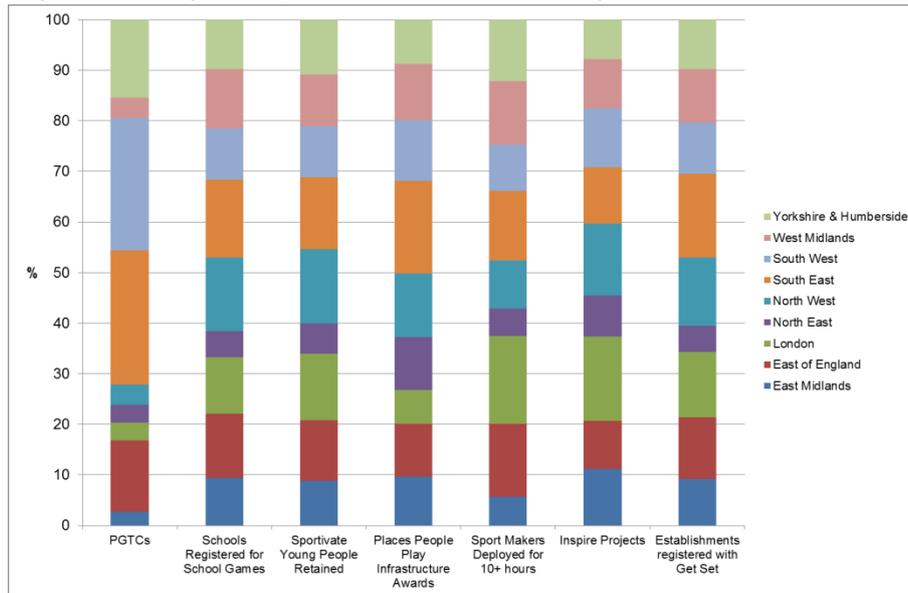
	Total output (£m, 2009 prices)	Total GVA (£m, 2009 prices)	Total job years of employment	Total earnings (£m, 2009 prices)
London	£19,140	£9,430	138,720	£4,070
South East	£7,970	£3,920	92,260	£2,040
East of England	£5,220	£2,540	61,000	£1,260
West Midlands	£4,660	£2,140	57,720	£1,080
Scotland	£4,540	£2,290	51,160	£1,500
North West	£3,730	£1,770	49,690	£910
Yorkshire and the Humber	£3,090	£1,410	38,630	£760
East Midlands	£3,090	£1,410	37,990	£740
South West	£2,910	£1,390	41,370	£750
North East	£1,280	£640	16,650	£330
Wales	£1,270	£570	20,310	£350
Northern Ireland	£790	£380	12,270	£210
Total	£57,700	£27,900	617,780	£13,980

Source: Oxford Economics (2013) London 2012 Olympic and Paralympic Games – Economic Modelling (see Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base Annex A)

The nations and regions have also benefited from the local delivery of a number of activities and legacy programmes related to the 2012 Games. These include for example Sport England's Places People Play projects, School Games, Sport Makers, Get Set, Inspire, the Pre-Games Training Camps, the Cultural Olympiad, CompeteFor and the Olympic Torch Relay. Across all of the nations and regions, these activities have provided a range of opportunities for people to engage with the Games, participate in sport, physical activity and culture, as well as providing significant investment in sporting facilities throughout the UK.

The School Games had over 16,000 schools registered by the end of 2012 from across England and there were a final estimated 266 PGTC agreements in place across the UK, 226 of which were in England. 115,404 young people were retained by Sportivate with 17,174 Sport Makers deployed for 10 hours or more across England and 1,294 awards to venues through Places People Play (Figure 8-4).

Figure 8-4: Regional split of benefits across England

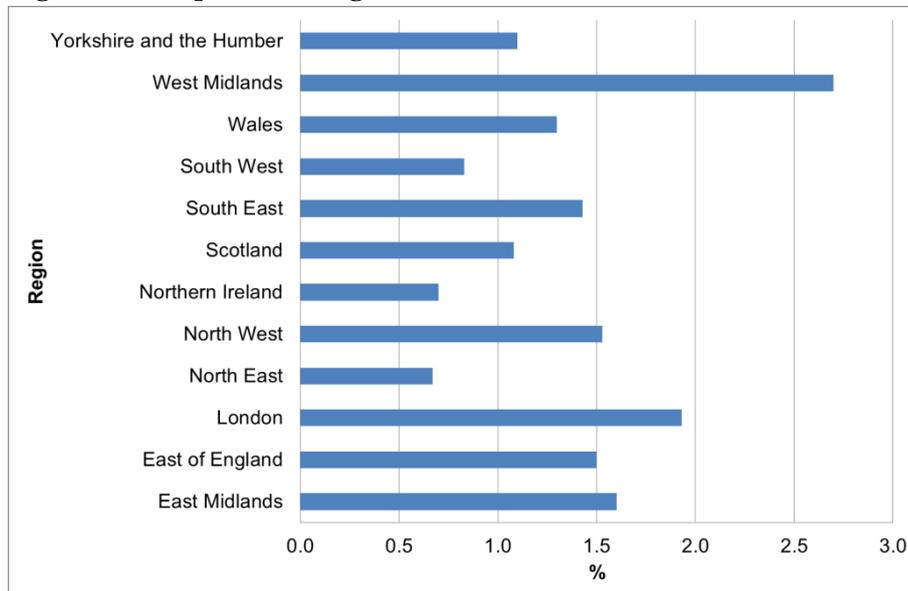


Source: Sport England, London 2012 Olympic Games and Paralympic Games Inspire Programme legacy survey: United Kingdom, Meta-Evaluation of the Impacts and Legacy of the London 2012 Games and Paralympic Games Sport Evidence Base

The Cultural Olympiad Evaluation³²⁷ also noted that activity took place in all parts of the UK and provided a means for people across the country to engage with and celebrate the excitement surrounding the Games. In total, the Cultural Olympiad generated over 43 million public engagement experiences, of which the vast majority were free opportunities.

The CompeteFor Evaluation found that there was good geographical spread of contract awards amongst businesses that are registered on CompeteFor (Figure 8-5).

Figure 8-5: Proportion of registered businesses awarded contracts



Source: CompeteFor Contract Management Team (Transport for London)

The Olympic Torch Relay provided a focal point for communities across the UK to come together as the flame was carried through more than 1,000 cities, towns and villages with an estimated 15 million people coming out to see it.

³²⁷ Dr Beatriz Garcia (April 2013) London 2012 Cultural Olympiad Evaluation

Within London, and particularly East London, communities have already experienced a significant number of benefits ranging from transport improvements (such as the doubling of capacity of Stratford station), to improvements of the public realm to the development of Westfield Stratford City. In addition, there is the development of the Olympic Park and its subsequent transformation, which will create:

- New leisure facilities including sports venues and the Park itself;
- New education facilities including two primary schools, one secondary school, nine nurseries and at least two higher education institutions;
- New health facilities including three health centres; and
- New community facilities.

Alongside this, East London residents have also benefited from a significant number of employment opportunities. For example, at least 30,000 host borough residents were employed directly as a result of the Games, either in the construction of the Olympic Park and the Athletes' Village or in Games-time roles.

(ii) Target groups

Turning now to look at the extent to which the Games have impacted on different target groups it is possible to identify evidence of impact on a number of different groups.

It should be noted that disabled people were an important target group; however, the extent to which they have benefited from the Games is not discussed here as this group is the subject of a separate cross-cutting question (see section 8.7).

Young people

It is apparent through the evidence available that the Games acted as a motivator for participation amongst young people. Taking Part found that over one third of 5 to 10 year olds and over half of 11 to 15 years olds had been encouraged to take part in sport 'a lot' or 'a little' between October 2011 and September 2012 as a result of the UK hosting the Olympic and Paralympic Games.

The Games have also acted as a motivator for participation of 16 to 24 year olds with 25.2% indicating that the UK winning the bid to host the Games has motivated them to do more sport and physical activity. This is statistically significantly higher than the national average of 16.0% and the highest for all age categories.

As a result of Inspire, the frequency of participation of children increased, with 12.2% more participants doing sport several times a week after the programme (as compared with before the programme).³²⁸ Children also demonstrated higher positive impacts than the population as a whole with:

- 70% planning to take part in sport and physical activity in the future;
- 72% intending to 'have a go' at other/new sports & physical activities; and
- 60% planning to join a club/programme to take part in sport & physical activity.

Sportivate provides opportunities for teenagers and young adults (aged 14 to 25) to receive six to eight weeks of coaching in the sport of their choice at a local venue, guiding them into regular participation within their community when the six to eight weeks has ended. Monitoring data indicates that to 5 October 2012:

- 140,555 young people were engaged (i.e. participating in a 6-8 week course);

³²⁸ Knight, Kavanagh and Page (February 2013) *London 2012 Olympic Games and Paralympic Games Inspire programme legacy survey*

- 115,404 young people (82% of those engaged) completing at least all but one session (retained) – 83% of the total target for years 1 and 2; and
- 820,894 attendances in total.

Evaluations^{329,330} of the first 18-months (April 2011 to October 2012) of activity indicate retention and sustainability are high with 82% of those engaged being retained and 72% of those engaged being sustained.

For children, the effect of these opportunities and the motivation provided by the Games can be seen on participation levels, with the latest Taking Part data showing sport participation in the last week rose for both those aged 5 to 10 (to 76.0%) and 11 to 15 (to 94.4%) compared to 2011/12.

Women

The Taking Part survey indicated that since 2010/11 women's participation in sport has increased after several years of flat growth, with the highest levels of participation recorded in the period between January and December 2012 period. Participation for women increased significantly by 3.1% in 2012 compared to 2005/6. The Games also acted as a motivator for participation with 15% of women indicating that the UK winning the bid to host the Games has motivated them to do more sport and physical activity. Whilst both these increases are lower than for men they still demonstrate good progress and the influence of the Games. Furthermore, following the good performance of Team GB's female athletes during the Games, raising the profile of women's sport has become a priority for the Department for Culture, Media & Sport, with: additional investment to boost female participation allocated; a programme of work to identify and encourage talented women to apply for Board positions in sport developed; and closer alignment with the media to raise the profile of women's sport.

Women have also benefited from the opportunity to work in construction, a typically male dominated industry, on both the Olympic Park and the Athletes' Village. Over 1,000 women worked on the demolition and build of the Olympic Park, making up 4% of the total workforce, with a further 448 working on the construction of the Athletes' Village, 2.7% of the total workforce. However, while these numbers are encouraging, particularly compared to the UK construction benchmark of 1.2% women, it should be noted that the proportion of women employed was significantly below the ODA benchmark of 11% women. In terms of LOCOG's Games-time workforce, 46% (3,818) of the Games-time workforce and 41% (41,000) of the Games-time contractor workforce were female.

Black and Minority Ethnic Groups

The Taking Part survey data shows that since 2010/11, participation in sport of black or minority ethnic (BME) groups has increased after several years of flat growth, with the highest levels of participation recorded in the period between January and December 2012. Participation for BME groups increased statistically significantly by 5.0% in 2012 from 2005/6. The significant participation opportunities provided by the Games and the motivational effect of the Games have been key to facilitating this increase.

Taking Part survey data also found that BME groups showed the highest levels of engagement and enthusiasm for the Games. BME groups were more than twice as likely as the adult population to be motivated by the Games to do more sport, almost three times as likely to be motivated by the Games to do more cultural activity and three and a half times more likely to be motivated by the Games to volunteer. This demonstrates the significant impact of the Games on these groups.

BME groups benefited significantly from the direct employment opportunities created as a result of the Games. 15% of those employed as part of the demolition and build of the Olympic Park and 13% of those employed as part of the construction of the Athletes' Village were from BME groups. Both of these were significantly above the UK construction industry

³²⁹ Sport Structures (no date) *Sportivate Programme Evaluation, Annual report April 2011 – March 2012*

³³⁰ Sport Structures (no date) *Sportivate Programme Evaluation, Six Month Report April 2012 – October 2012 (Year 2)*

benchmark of 3% and, in the case of the Olympic Park, above the ODA benchmark of 15% (with the Athletes' Village just marginally below target). Forty per cent (3,320) of LOCOG's Games-time workforce were from BME groups and 50% (50,000) of the Games-time contractor workforce were.

8.7 How far have the Games changed attitudes to disability, and increased the participation of disabled people in sport, the economy, volunteering and culture?

The Games provided an unprecedented opportunity to promote positive messages about disabled people. Creating opportunities for disabled people to participate in sport, cultural festivals and volunteering and to access supply contracts and employment created by the Games were also key ambitions of the legacy strategy. This section reviews evidence from across the meta-evaluation relating to the extent to which the opportunity to change attitudes has been acted upon, as well as how far the Games has changed attitudes to disability and increased opportunities for participation by disabled people in a range of spheres.

(i) Attitudes to disability

There was optimism and expectation that the Channel 4 and wider coverage of the Paralympic Games would positively influence attitudes towards disabled people. The scale of the opportunity is illustrated with reference to viewing figures. Channel 4's Paralympic coverage reached an unprecedented share of the viewing audience, achieving record viewing figures. Almost 40 million people – more than two thirds of the UK population – viewed the Paralympic Games on TV.³³¹ During Games-time there was also significant wider media coverage which sought to capitalise on the opportunity to influence attitudes. For example, the Office for Disability Issues (ODI) worked with Channel 4 and other Olympic sponsors with an emphasis on awareness and attitude change and the Minister for Disabled People also raised awareness about disability through extensive media coverage. ODI worked with the British Paralympic Association to produce a media guide for sports journalists to encourage reporting on the Paralympics for which demand was very high and during Games-time, disability organisations and charities also undertook communications activity to capitalise on the opportunity provided by the Games.

There is a range of evidence which explores this potential contribution of the Games to improve public attitudes towards disabled people. Notably, a module of questions specifically around the 2012 Games in the British Social Attitudes Survey (BSAS) confirmed the role the Paralympic Games could play in reducing prejudice and views of disabled people. Just under a quarter of respondents felt that the Paralympic Games would reduce prejudice 'a lot', and almost 40% felt it would reduce prejudice 'a little'. In over half of all cases respondents stated that their view of disabled people would remain the same after the Paralympic Games; however, over 40% stated that they would have a more positive view. The fieldwork for the 2012 BSAS was undertaken throughout 2012 and the proportion of people who felt that the Paralympic Games would reduce prejudice a lot increased significantly amongst those surveyed after the Games compared to those interviewed before or during the event.

Other public attitude surveys commissioned before, during or shortly after the Paralympic Games showed similar levels of optimism about the effect the Games would have on attitudes towards disabled people. This includes a survey by Scope which found that 62% of disabled people and their families believed the Paralympic Games could improve attitudes towards disabled people and a Government Office for Disability Issues public survey which revealed that 8 in 10 (81%) of British adults felt that the London 2012 Paralympic Games had a positive impact on the way disabled people are viewed by the public.

The meta-evaluation has also examined evidence of the changing attitudes towards disabled people reflected in the print media. Analysis of media content in the period from 2008 up until the end of the Games showed a significant improvement in the way disability was reflected in

³³¹ Channel 4 (2012) *The London 2012 Paralympic Games. Brought to you by Channel 4*. Based on three minute reach of TV coverage over duration of the Paralympic Games.

the press.³³² Overall, the study found that in the UK press between 2008 to 2012, there has been increased use of preferred (or more accepted) terms for referring to disabled people (e.g. person with a disability, disabled, wheelchair user), while the use of less acceptable terms for referring to such people (e.g. handicapped, confined to a wheelchair), was in sharp decline. Specifically, media coverage in 2012 contained a peak in the number of times disability was mentioned in the press using acceptable terms and a notable drop in dispreferred terms. This indicates a major positive shift in the discourse surrounding disability in the year of the Paralympic Games.

The context for this assessment is that public attitudes towards disabled people had been improving between 2005 and 2009³³³ so the desired effect over time is a further increase in the long-term trend. From 2005 to 2009³³⁴, a smaller proportion of people said that they thought of disabled people as 'getting in the way' (7% compared with 9% in 2005) or with some 'discomfort and awkwardness' (17% compared with 22% in 2005). People were also more likely to think of disabled people as the same as everybody else (85% in 2009 compared with 77% in 2005). The questions were repeated in 2012 through a further wave, and overall results show that attitudes had levelled off, which based on the findings of the research mentioned above, could point towards a mitigating influence of the Games. Future monitoring will be needed to draw conclusions regarding any change in attitudes towards disabled people and any association with the Games.

(ii) Sports participation

Supporting an increase in disabled people's participation in sport was a key legacy objective. While opportunities to participate are crucial, providing the supporting infrastructure in the form of accessible facilities and softer infrastructure, like coaching and sport volunteering are equally important. These aspects are considered in turn.

Evidence of progress can only be discerned at the level of individual initiatives. Accessibility was an important focus for the ODA, LOCOG and LLDC when designing and constructing the venues to ensure that disabled people are able to use the facilities within the Olympic Park. Stakeholders commended the Olympic Park venues for being accessible for disabled athletes and supporters and the expectation that the venues are expected to be fully accessible in legacy use. There is also some evidence that investment by Pre-Games Training Camps (PGTCs) has supported accessible opportunities, as a survey of PGTCs revealed a positive impact on sports participation by disabled people. Fifty three per cent of respondents indicated a positive impact. In addition, 45% indicated that the PGTC had a positive impact on the awareness of disability.³³⁵

Another Games-related investment in facilities is the £124m investment³³⁶ on the Places People Play programmes – Inspired Facilities, Iconic Facilities and Protecting Playing Fields all have objectives relating to participation for disabled people.

Many of the legacy programmes have provided direct funding for sporting opportunities for disabled people. For example, nearly 12% of the athletes taking part in the level 4 School Games competition in 2012 were disabled. Inclusive Sport invested over £10 million to create opportunities for disabled people. As these Inclusive Sport awards have only recently been made, the impact of this funding is unknown at this stage. However is likely to create additional opportunities to boost sports participation for disabled people.

³³² Tony McEnery, Amanda Potts and Richard Xiao (2013) *London 2012 Games Media Impact Study*. The study covered approximately 13 billion words of general English from 2008 and 2012, 93 million words of UK National Newspaper reporting and 35 million words. of Global Press reporting.

³³³ Office for Disability Issues (2010) *Public Perceptions of Disabled People: Evidence from the British Social Attitudes Survey 2009*. Based on specific modules on attitudes towards disabled people asked in 2005 and 2009 in British Social Attitudes Survey.

³³⁴ British Social Attitudes Survey

³³⁵ See *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base*

³³⁶ Including indicative budget expenditure for 2013/2014

Overall trends in sports participation by disabled people are positive, although evidence is not sufficiently strong to make any direct link between the influence of the Games and overall trends. After a fall in participation in 2009/10 to 23.9% down from 25.1% in 2005/6, those with a long-standing illness or disability have seen a steady rise in participation since 2010/11, with participation peaking in the January to December 2012 period at 29.3%, a significant increase since 2005/06.

It seems likely that the Games have made a contribution to sports participation in 2012 based on survey evidence. Taking Part survey data indicates that the Games acts as a motivator for sport participation with 13% of those with a limiting disability indicating that the Games have motivated them to do more sport.

(iii) Economic participation

There are two main dimensions relating to the effect of the Games on increasing participation of disabled people in the economy: the visitor economy and employment opportunities associated with the Games.

Around 11% of all overnight domestic trips in England between January and June 2009 were made by groups of visitors including at least one person with special access needs.³³⁷ Key stakeholders (government, LOCOG, sector bodies and tourism/leisure sector private companies) came together via the 'Accessible Tourism Stakeholder Forum' to maximise opportunities for disabled people to participate as visitors to the Games and achieve a lasting legacy for accessible tourism.

The key areas of Games-related activity linked to improving accessibility for disabled tourists encompassed customer service training, improvements to the availability of accessible hotel rooms, a disabled customer website sharing information on accessible tourist facilities (run by Inclusive London) and improvements to the public realm (notably on London's Southbank). Overall, stakeholder evidence confirms that these investments would not have happened otherwise and it is apparent through the limited evidence available that the Games was a catalyst for stakeholder engagement across the accessible tourism stakeholders in London. Several developments, including the public realm improvements on the Southbank and the Inclusive London website, remain available for disabled tourists as part of the legacy. However, a lack of hard data and limited evaluation in this area limits the extent to which effects and impacts of this activity can be identified and quantified.

Both ODA and LOCOG sought to meet high standards in inclusion and equality in their workforce and contractor workforce. LOCOG met their target with around 4% of their employment opportunities being taken up by disabled people. The equivalent figure for the ODA was 1% with the difference likely to reflect the types of jobs created.

(iv) Volunteering and cultural participation

Encouraging and enabling people to play a more active part in society were key objectives for the legacy of the Games. Programmes and initiatives were aimed at increasing opportunities for volunteering and other forms of social action in order to encourage the formation of social capital and create a range of benefits for individual participants and their communities. The Games provided a range of opportunities for disabled people to participate in volunteering. Data specifically related to participation by disabled people is limited. LOCOG data shows that 4% of their volunteer workforce had a disability, which is within LOCOG's target range.

It is clear that the importance of the Games as a one off opportunity encouraged volunteering and efforts to sustain this interest (e.g. through Join In) will play a strong role in cementing any increased interest and demand. Participation in volunteering by those with a long-standing illness or disability has increased since 2010/11³³⁸. During 2012, it exceeded the level recorded by those who had no long-standing illness or disability for the first time since the survey began in 2005/06, increasing by over three percentage points in 2012 compared to 2011/12 (from

³³⁷ UKTS, Visit England data for 2009, a question on accessibility was added in 2009 for one calendar year only

³³⁸ Source: Taking Part

22% to 25%). The data for 2012 mirrors the expectations of stakeholders of a small increase in participation in 2012, rather than a major shift, and it is not yet clear whether this will be sustained in future years. It should be noted that one limitation of the Taking Part survey is that it captures data on the presence or absence of volunteering amongst respondents in the last 12 month period, but does not collect further data on the frequency of participation so is unable to highlight changes in the amount of volunteering being undertaken by disabled people. This data only covers England and no equivalent data is available for other nations.

One of the aims of the Cultural Olympiad was to showcase the work of deaf and disabled artists and to bring this work to a wider audience. This aspect of the programme is regarded by stakeholders to have been extremely successful, resulting in additional commissions for the artists involved and an enhanced profile for their work. Evaluations of the Cultural Olympiad and Legacy Trust UK also provide evidence of these achievements.

For example, the Unlimited programme was intended to play a major role in challenging perceptions of disability by showcasing the world class talents of the UK disability arts movement, and also expanding even further the opportunities for direct engagement with arts and culture for disabled people. Accentuate, the Legacy Trust UK programme for the South East of England, also promoted the skills and talents of disabled people and worked with organisations in the region to improve access for disabled people. Across the Cultural Olympiad as a whole an estimated 806 of the participating artists were deaf or disabled.

An audience survey undertaken at eight London 2012 Festival projects found that 8.2% of respondents reported that they had a disability and/ or long-term health condition and that, in addition, 5.3% of respondents reported that they had someone in their party with a disability and/ or long-term health condition. Although this cannot be seen as representative of the audience for the Cultural Olympiad as a whole it does suggest that those with a disability attended a range of different types of activities, although it is not known to what extent these respondents would already typically participate in cultural activity. The majority (77%) of respondents rated accessibility for those with disabilities or access issues as seven out of 10 or higher.

Across all Legacy Trust UK programmes, it is estimated that over 75,000 participants were disabled, accounting for 5.5% of all participants; however, for many programmes the percentage of disabled participants was lower (1 or 2%). The evaluation of Legacy Trust UK³³⁹ concludes that where there was a focus on disability this work has been successful in delivering lasting change for disabled people, as well as increasing understanding and awareness of disability issues for non-disabled people. However, counter to this, it appears that unless a specific focus is given to disabled participants or artists, barriers are such that participation remains low.

The Taking Part survey showed that the proportion of disabled people or those with a long-standing illness who engage with the arts is significantly lower than for those who do not have a long-standing illness or disability. However, data showed an increase in engagement by those reporting a long-standing illness or disability in recent years, leading to a narrowing of the participation gap.

An evaluation of the 'Summer Like No Other' programme, which formed part of the London 2012 Festival, revealed that the programme had been designed and delivered in an accessible way that enabled deaf and disabled people to take part.³⁴⁰ The evaluation concluded that effective marketing of events to deaf and disabled customers was essential, along with access to parking, clear signage and proper access routes. Part of the programme involved disability awareness training to 60 people within London's cultural organisations and it was hoped this would leave a legacy.

³³⁹ Janice Needham, et al (2013) *Legacy Trust UK: Evaluation Report*. This evaluation compiled evidence from programme level evaluations subject to the caveat that where no evidence on a particular outcome was present in the programme level evaluation this did not necessarily indicate that the programme did not have an impact in that area as it could instead mean that this aspect was not covered by the evaluation.

³⁴⁰ Attitude is Everything (2013) *Summer Like No Other Access Evaluation*

Overall, the evidence confirms that considerable effort was made to support participation by disabled people. There seems to be a high degree of confidence amongst stakeholders that this will achieve the stated legacy objectives and that the momentum achieved through the Games around sports participation and volunteering in particular could be sustained through continued efforts to promote opportunities.

8.8 How far have the Games contributed to sustainable development, in particular through demonstration effects and the encouragement of behavioural change?

The scale of the Olympic Park development created significant potential for learning and good practice in the area of sustainability. The planning, design, construction, procurement and staging of an undertaking such as the Games all had the potential to contribute to the creation of sustainability learning that could benefit wider industry and government practices.

The London 2012 Sustainability Plan set out how LOCOG and the ODA would contribute to a range of sustainable development objectives for the Games. These included objectives relating to carbon emissions, efficient water use, waste reduction and sourcing of materials. There was also potential for the Games to inspire individual people to live more sustainably by encouraging them to reduce their carbon footprint and be more energy efficient by making more sustainable travel choices and increasing the amount of waste recycled, helping to contribute to achieving Government targets for reducing carbon emissions. It was anticipated that the profile of the 2012 Games, both domestically and internationally, would be helpful in generating interest in the dissemination of good practice across industry. There was also an expectation that the profile of the Games and the publicity around it would help to inspire people to change their behaviour.

(i) Construction and infrastructure

The profile of the Olympic Park project provided significant potential for learning on sustainability. The available evidence reveals a range of examples of large-scale infrastructure projects and strategic infrastructure authorities taking on board the key features of the ODA's strategy and procurement approach on sustainability. These include Crossrail, High Speed 2, and key transport agencies, such as Network Rail and the Highways Agency. The Olympic Park project also helped to inspire a step change in performance in diverting waste from landfill. For example, most Transport for London (TfL) projects, Crossrail and other large-scale building projects now regularly specify 90- 95% diversion from landfill. The Velodrome is recognised as by far the 'greenest' building on the site and stakeholders believe the design approach, particularly the cable net roof and extensive use of sustainable timber, has significant potential to inspire more sustainable solutions in comparable developments.

(ii) Events management

There is clear evidence that lessons from the Games are being taken up in the events industry. A range of case studies on the use of the Resource Management Plan (RMP) tool for waste management developed for London 2012 demonstrate wide take-up of learning across the events industry. There was also a consensus amongst stakeholders and case study evidence to suggest that the Games has helped to deliver a cultural change within the events industry around waste segregation and the use of multiple bins to collect different materials.

LOCOG's Sustainability Management System (SMS) is widely regarded as a key innovative aspect of LOCOG's approach to sustainability. LOCOG's system was independently certified to the new British Standard BS 8901:2009 – 'specification for a sustainability management system for events' – which was upgraded to an international standard (ISO 20121) in June 2012. There is clear evidence that the BSI standard was developed as a direct consequence of London winning the bid and that it has major potential to improve the sustainability approaches of businesses in the events industry. Although no specific data on take-up of the BS and ISO sustainable management standards is available, stakeholder views and case study evidence suggest that BS8901/ ISO20121 has been widely adopted by event venues and venue contractors.

(iii) Dissemination of good practice

As early as 2008, the Commission for A Sustainable London 2012 (CSL) recommended that a learning legacy be established to enable London 2012 to make a difference to the sustainability agenda. The ODA and LOCOG have both produced a comprehensive suite of learning legacy material that provides a detailed account of the key elements of sustainability good practice. The UK Green Building Council (UK-GBC) were chosen to support the ODA's Learning Legacy programme on the topic of construction sustainability and played a key role in the dissemination of good practice in this area. UK-GBC's London 2012 Sustainability Lessons Learned series held in 2012 consisted of two streams of events running in tandem. All of the courses were well attended and feedback from delegates was generally positive in terms of the potential impact of the workshops on their work and future developments. Stakeholders were also generally positive in their assessment of the UK-GBC series.

Despite the intellectual capital generated by the ODA's learning legacy materials on construction, stakeholders believe that an opportunity may have been missed in terms of the using the pull of the Games to maximise learning and sharing of information. Stakeholders were of the view that the Government could have perhaps played a stronger role in dissemination, taking advantage of the unique opportunity that the profile of the Games brought to promote and showcase good practice. Looking forward, the Department for Environment, Food and Rural Affairs (Defra) is to publish a Sustainable Procurement Guide for Construction Projects based on the learning from the Games.

(iv) Behavioural change

In the run-up to the Games, Transport for London (TfL) delivered a comprehensive awareness campaign of the potential transport impact on businesses and commuters that additional users during the Games might bring. This provided a significant opportunity to challenge travel behaviour and encourage the use of greener modes. TfL strongly encouraged and provided practical advice on walking and cycling routes for people moving around London during the Games. Monitoring of travel behaviour during the Games revealed increases in the number of cyclists and pedestrians in both Central and East London, which is likely to reflect a combination of an increase in the number of people needing to travel (e.g. tourists) and some shift towards walking and cycling amongst regular travellers. Overall during the Olympics, the vast majority of the London travelling population made some form of change to their normal travel patterns (just 23% continued to travel as normal throughout).

The Games were used effectively as an opportunity to demonstrate the potential to implement a recycling system for litter. The use of colour-coded bins for segregation of different waste streams at the Olympic Park during the Games conveyed a strong message regarding the practicalities of recycling waste at public venues. Monitoring was undertaken to ensure that the system was being used properly to avoid contamination and ensure that communication and labelling was clear both front and back of house. A number of stakeholders suggested that more could have been done in and around the Olympic Park to communicate sustainability messages. For example, details of the sustainability features which had been designed into the venues and the communication tools which had been put in place (such as the 'Walk in the Park' self-guided trail that could be downloaded by visitors through the London Games 2012 Spectator App) could have been publicised more effectively.

It is clear that significant effort was made to ensure that London 2012 was the greenest Games ever and this extended to attempts to influence travel choices during Games-time and visibly promote recycling at venues. The CSL post-Games review and stakeholder evidence indicates that both of these measures were successful at influencing behaviour of travellers during the Games and of visitors to venues; however, the longer-term effect on behaviour or sustainable development has not been evaluated.

8.9 In what ways have the 2012 Games and associated activity contributed to well-being?

As part of its work on 'measuring what matters' the Office for National Statistics is looking at developing a series of measures to help in "*understanding the nation's well-being*".³⁴¹ This work has identified the following 10 themes which influence well-being:

- Economy;
- Individual well-being;
- Our relationships;
- Where we live;
- Health;
- Natural environment;
- Personal finance;
- What we do;
- Governance; and
- Education and skills.

Below each of the 10 themes ONS has identified 38 measurable indicators. These indicators cover a very broad range of measures, from the number of hectares of protected areas in the UK, to the inflation rate, to the percentage who rated their happiness yesterday as medium/high. Therefore, seeking to measure and understand well-being is a complex task. It is one that is made harder when the need to consider the causality of the Games is taken into account.

As a result, in seeking to answer this research question the focus has been on a small number of measures where there is evidence that the Games is likely to have had a positive impact on well-being. For some, ONS measures of well-being are used, for others which are not an appropriate degree of causality is assumed. These include:

- Individual well-being – happiness linked to the Games and sport participation;
- Where we live – those agreeing that they belonged to their neighbourhood, as well as wider satisfaction with their area as a place to live;
- Health – sport participation and the associated benefits to health; and
- What we do – the benefits of both employment and volunteering.

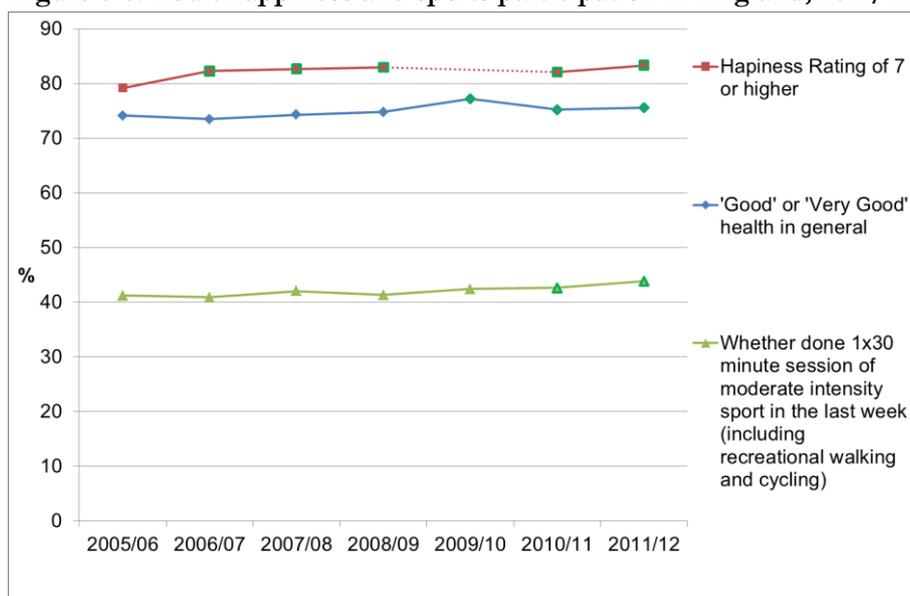
The remainder of this section looks at each of these in turn.

(i) Individual Well-Being

Happiness is one of four measures of individual well-being, and it is apparent from the available evidence that there is a correlation between happiness and sport participation, with higher levels of sport participation linked to increased happiness, although the evidence of causality in this relationship is less clear.

Figure 8-6 suggests that those who do sport (1 x 30mins moderate intensity sport per week (including recreational walking and cycling) are happier than those that do not. In general as one moves towards the 'extremely happy' end of the scale, the percentage of people who are doing sport increases. Moreover, on average, for those who rate their happiness as 7 or above (with the rating going from 1-10 with extremely unhappy at 1 and extremely happy at 10), 46.0% are doing sport. However, for those who rate their happiness in the bottom 4 categories (1-4), 32.7% are doing sport.

³⁴¹ See <http://www.ons.gov.uk/ons/guide-method/user-guidance/well-being/index.html>. Accessed 2 May 2013.

Figure 8-6: Adult happiness and sports participation in England, 2011/12

Source: *Taking Part*

Both *Taking Part* and *Active People* indicate that participation has increased since 2005/6:

- *Taking Part* data indicates that the proportion of adults participating in at least one 30 minute session of moderate intensity sport (including recreational walking and cycling) in the last week has increased by 3.5 percentage points in 2012 since 2005/6, equivalent to 1.5 million more participants; and
- *Active People* recorded an increase in the proportion of adults doing at least 1x30 minute session of moderate intensity sport³⁴² in the last week of 1.8 percentage points from October 2005-October 2006 to October 2011-October 2012.

Econometric research³⁴³ on *Taking Part* survey data indicates that overall there had been a longer term increase in both health and happiness, with health rising in the post-Beijing period and happiness in 2012. Given the wide range of influences on both happiness and health, it is difficult to distinguish an Olympic effect, however evidence of the impact of sports participation on the health and wellbeing of individuals is clear. Thus as the Games have impacted on participation (see section 3), it follows that it should in turn have impacted on health and well-being.

Furthermore, although there was no significant Olympic 2012 affect overall, the longstanding illness and disability subgroup show significant impacts on health and happiness during the Games, and the 16-25 subgroup show significant impacts on happiness. However the smaller sample sizes suggest these results should be treated with caution.

This conclusion is further supported by UK Sport's Sporting Preferences Survey. This survey found that respondents' perceptions of the impact of the 2012 Games on well-being related social benefits were significantly higher post-Games:

- Improve people's psychological well-being, net agree – 58% pre-Games, 72% post-Games; and
- Improve social problems, net agree – 35% pre-Games, 51% post-Games.

³⁴² This excludes recreational walking and cycling and is thus lower than the *Taking Part* measure.

³⁴³ Dr. Paul Downward, Dr. Peter Dawson and Professor Terrence Mills (2013) *The Impact of the Olympic Games on Sport Participation, Motivation, Health and Well-Being* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Sport Evidence Base*)

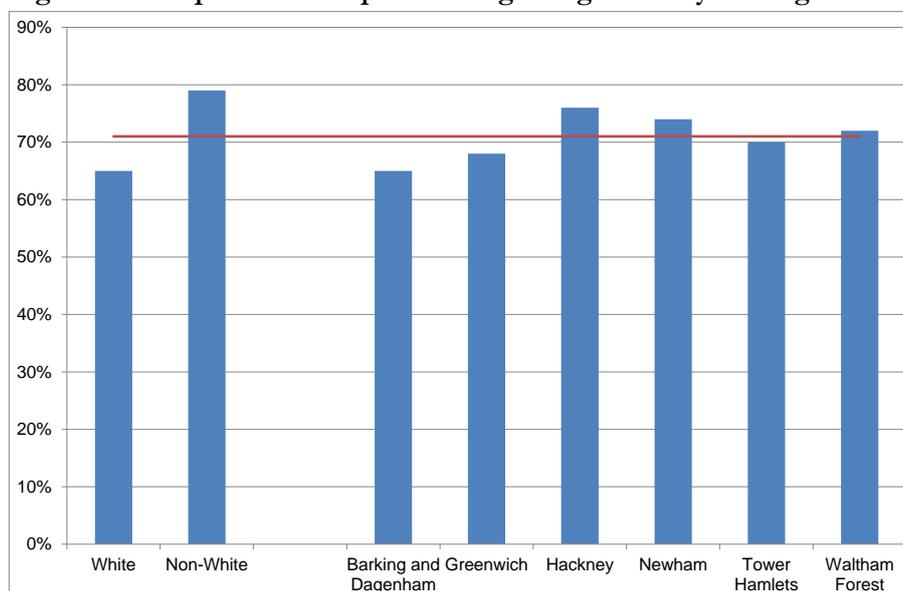
In addition, Taking Part survey data indicated that those intending to engage with the 2012 Games, were significantly happier than those who did not plan to follow the Games (who had an average happiness score of 7.5). This compares to:

- An average happiness score of 8.1 for those "actively following" the Games;
- An average happiness score of 7.9 for those "attending events"; and
- An average happiness score of 8.3 for those "Volunteering for a Games time role".

(ii) Where we live

There are four measures of well-being under the theme 'where we live'. One of these measures relates to the proportion of people who agree that they feel they belong to their neighbourhood. As part of the Olympic and Paralympic Host Borough Survey, residents were asked whether they felt that they 'belonged' to their local area. Seventy-one per cent said that they did; a finding that was more true for non-white (79%) respondents than white respondents (65%), and across the six host boroughs the figures ranged from 76% in Hackney to 65% in Barking and Dagenham (Figure 8-7).

Figure 8-7: Proportion of respondents agreeing that they 'belong' to the local area

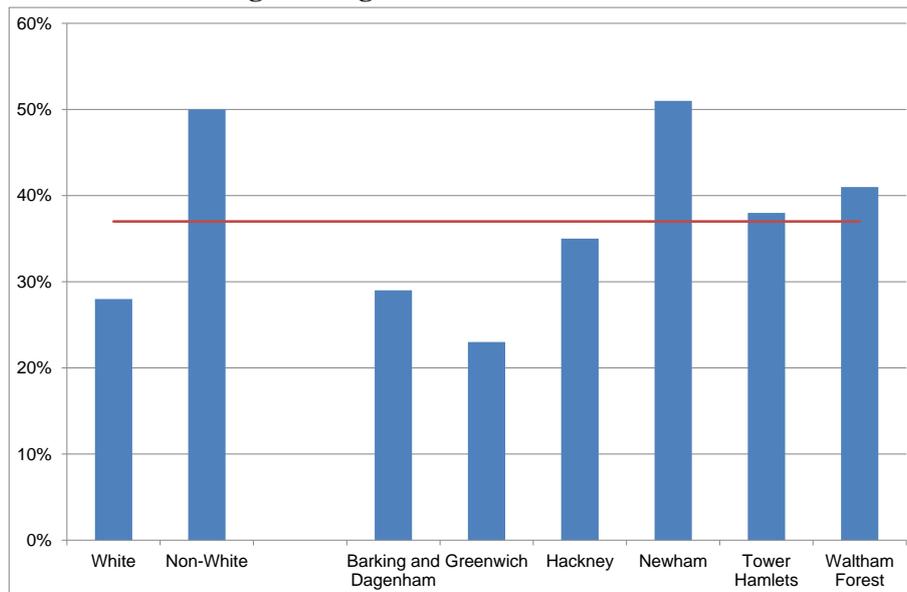


Source: Olympic and Paralympic Host Boroughs Resident Survey

Note: Red line shows the total for all respondents

Although it is not possible to know the extent to which the Games has influenced feelings of belonging (as the question was not asked of respondents), it is apparent through other relevant proxy measures the Games has positively influenced resident perceptions of the area in which they live. Eighty-one per cent of respondents agreed that their local area was a place where people from different backgrounds 'get on well together', a view that was supported by both the white (79%) and non-white (83%) respondents alike. However, more significantly in terms of this research question, over a third (37%) of respondents agreed that the Games made people from different backgrounds in their local area get on better, while the same proportion disagreed. Again, there is a disparity of views across the host boroughs with respondents living in Newham more likely to agree (51%) and less likely to disagree (27%), as opposed to respondents living in Barking and Dagenham who were less likely to agree (29%) and more likely to disagree (49%) (Figure 8-8).

Figure 8-8: Proportion of respondents agreeing that the 2012 Games has made people from different backgrounds get on better

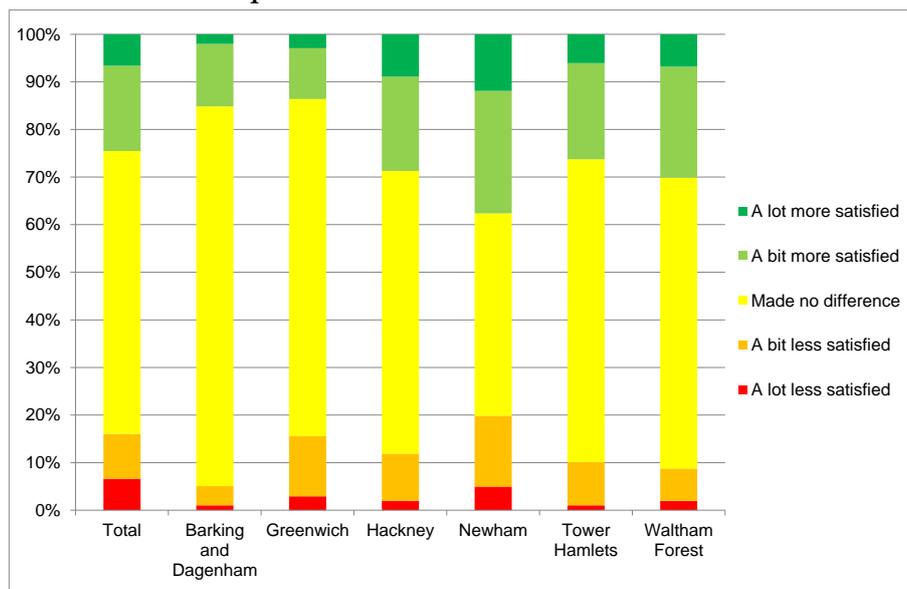


Source: Olympic and Paralympic Host Boroughs Resident Survey

Note: Red line shows the total for all respondents

A similar pattern is apparent in terms of overall satisfaction with their area as a place to live. Over three-quarters (79%) of respondents to the survey were satisfied with their local area as a place to live, a third of whom (31%) were 'very satisfied'. Only 5% of respondents were 'very dissatisfied' with their local area as a place to live. A quarter (26%) of respondents felt that hosting the Games had made them more satisfied with their area as a place to live, 10% felt that it had made them less satisfied and the majority (63%) felt that it had made no difference. Respondents who lived in Newham were more positive than those in the other host boroughs with 39% stating that hosting the Games had made them more satisfied with their area as a place to live (Figure 8-9).

Figure 8-9: Extent to which hosting the Games has made respondents more satisfied with their area as a place to live



Source: Olympic and Paralympic Host Boroughs Resident Survey

Through the evidence available it is apparent that the Games may have impacted on well-being by improving the places where people live in East London.

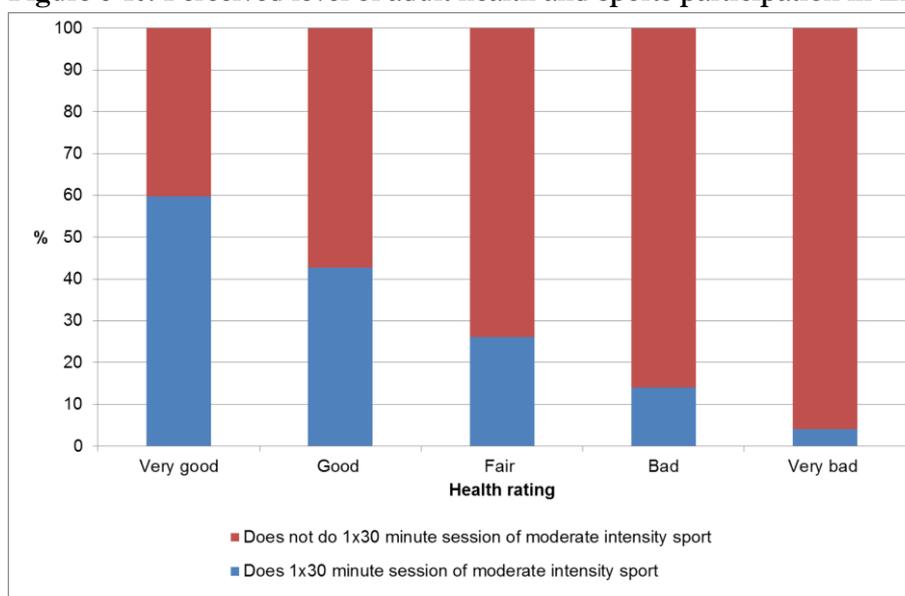
Therefore, while evidence of causality is not available and trend data is limited there is some evidence to indicate that the Games has positively impacted on people's perception of where they live and that in turn this will be a positive driver of well-being.

(iii) Health

One of the four health well-being measures relates to the number of people who were satisfied with their health. The meta-evaluation has not collected any information specifically relating to health satisfaction, but drawing on evidence from the Taking Part survey, Inspire and UK Sport's Sporting Preferences it is apparent that the 2012 Games has positively contributed to health through increased sports participation.

In the case of subjective health, of those who state their health to be very good, 59.8% reported doing sport (1 x 30mins per week). Similarly, of those who state their health to be very bad, 95.9% reported not doing any sport (Figure 8-10).

Figure 8-10: Perceived level of adult health and sports participation in England, 2011/12



Source: Taking Part

According to UK Sport's Sporting Preferences survey, respondents' perceptions of the impact of the 2012 Games on well-being related social benefits were significantly higher post-Games: 68% of people pre-Games and 83% post-Games indicated that the Games improved people's health and fitness. In addition, in a survey of the Inspire programme, organiser perceptions were that 73% of the projects impacted on the health and fitness of participants. A survey of Inspire participants revealed that 55% indicated that the Inspire programme made them feel healthier.

Positive health benefits at the individual level from participation in sport and physical activity are evidenced widely in academic literature, 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 here, it is also true that improved health enables increased sport participation.

(iv) What we do

In terms of 'what we do', it is possible to identify evidence in the meta-evaluation that would suggest that the Games is impacting positively on two of the five measures of well-being: unemployment and the numbers volunteering.

Reducing unemployment

Based on the evidence available it is apparent that both the preparation and staging of the Games have provided a significant number of job opportunities for those that were previously unemployed. The GLA Olympic Jobs Evaluation drew together evidence to assess the number

of workless London residents securing Games-related employment (expressed in gross terms so not accounting for deadweight, substitution or displacement) and estimated that 62,000 to 76,000 had found temporary or permanent employment as a result of the Games.

While not necessarily impacting on national or regional unemployment rates, these jobs will have had a positive impact on the well-being of those individuals who were previously unemployed and found work as a direct result of the Games.

Volunteering

The Games and related activities have prompted a significant increase in the supply of volunteering opportunities, particularly during Games-time. A number of volunteering programmes were created to support the running of the Games, most notably Games Makers which offered places for 70,000 volunteers with a further 8,000 volunteering places created by the Team London Ambassadors programme. Thousands more opportunities were created by regional and local volunteering schemes (e.g. Pre-Games Training Camps and the Torch Relays).

The Games appear to have inspired a full cross-section of the population to volunteer, as indicated by the demographic data for the Games Maker programme which shows a broad range of people (in terms of age, ethnicity and place of residence) were recruited to take part. However, the programme was most popular with younger and older age groups (which is consistent with the pattern of volunteering in the general population and reflects the increased leisure time generally available to students and the retired population). Games Makers were recruited from across the UK, with London (34%) and the South East (21%) together, perhaps unsurprisingly, accounting for over half of participants. A survey of Games Makers highlighted that the key motivating factors for volunteers related to the Games itself, that the opportunities provided the chance to be part of a once in a lifetime event like the Games³⁴⁴. The research also suggested that the majority of Games Makers were existing volunteers, although 20% of respondents had not volunteered before which shows that the Games had an inspiring effect on a significant number of people. Furthermore, almost half of respondents reported that they intended to increase their level of volunteering after the Games.

Given their link to the Games, these opportunities were largely temporary in nature. However, there is evidence that some schemes, notably Team London Ambassadors, are continuing to provide opportunities going forward by considering how volunteers can be mobilised at other venues and events. For example, since the Games, the Greater London Authority has undertaken pilot activity to provide visitor welcome services in key locations (e.g. St Pancras International) and support to other events (e.g. New Year's Eve celebrations), giving volunteers opportunities to further use and enhance the skills they developed in their Games-time volunteering roles.

Therefore, based on this evidence it would suggest that the Games have had, and will continue to have, a positive influence on the number of people volunteering, which in turn it can be reasonably concluded will positively impact upon well-being.

8.10 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 provided a unique opportunity to enhance the international profile and reputation of the UK, London and East London. Given the global interest in the Games and the billions of people watching them on television and the internet, there was potential to secure longer-term promotional impacts by using the Games and the media coverage to showcase London and the UK as attractive tourism destinations. The Games also provided a platform for the UK to showcase its capabilities, particularly UK businesses involved in the delivery of facilities and infrastructure in the Olympic Park but also in the delivery of mega-events. It also gave investment promotion agencies an important opportunity to promote London and the UK as investment locations. A range of research sources help to shed light on impacts in these areas.

³⁴⁴ Tracy J Dickson and Angela M Benson (2013) *London 2012 Games Makers: Towards Redefining Legacy*

(i) Perceptions

The influence of the Games on the profile and reputation of the UK was tested through a media perceptions study carried out in 2013³⁴⁵. The research showed that in a number of countries (including China) the Games switched discussion about the UK in the print media away from a negative discussion focussing upon a faltering economy and difficult military engagements overseas to a more positive discussion of positive economic activity, the Games and tourism.

The Nations Brand Index (NBI) is a measure of the international image of countries, or the 'power of the brand', based on a number of criteria across six dimensions: exports, governance, culture and heritage, people, tourism and investment/immigration. Research commissioned by VisitBritain indicated that the 2012 Games had a positive effect on the UK's nation brand in 2012. Between the annual NBI survey, which was conducted just before the Games began, and a special post-Games survey, the UK moved up one place to be ranked fourth out of 50 major countries around the world. Given that nation brands are very stable and no dramatic changes are generally expected between surveys, VisitBritain concluded that this change can be linked to the Games. Britain was ranked higher for culture (especially for sport) than it had been pre Games, and there were also improvements for welcome and natural scenic beauty, indicating that Games coverage had influenced perceptions of Britain and the British people more widely. The ranking for the UK as a tourism destination remained unchanged.

The influence of the Games on the reputation of London and East London was also tested through the media research.³⁴⁶ The study found the Games helped present London as a city which is transforming itself in a wholly positive way. It showed that in English speaking countries, the positive associations resulting from London hosting the Games were strengthened by a link being formed between the Games and the Diamond Jubilee and associated events. The study also presented evidence that the Games helped to alter international media perceptions of East London as a place to live, work and invest. The analysis concluded that the international media switched discussions away from negative aspects such as poverty and welfare dependency in the early part of 2012 to more positive accounts later in the year which placed greater emphasis on regeneration and investment opportunities in the area.

There is also some evidence of a positive influence on the perception of London amongst international tourists, derived from a survey of overseas visitors to the Games.³⁴⁷ Around three-quarters of overseas visitors who responded to the survey were left with a positive impression of London. The respondents were also asked if their experience of visiting the Games had made it more or less likely to want to visit London for a leisure trip in the future. Positively, 56% of overseas visitors said that the trip had made it 'much more likely' that they would want to visit London again in the future.

(ii) Marketing

The GREAT marketing campaign, which was inspired by the Games, has wider longer-term aims to increase the likelihood of people visiting the UK. An evaluation of the campaign showed that perceptions of Britain's strengths (heritage and culture) have improved in general and likelihood to visit in the longer term has grown for those who recalled the advertising (an index change of 120% in those likely to visit in the next three years comparing the pre-wave to post-wave responses). The evaluation concluded that the timing of the campaign and its association with the Games appears to have boosted the campaign's impacts. Less than half the amount spent in the pre-Games phase (Feb 2012-July 2012) of the campaign was spent in the post-Games phase (Sept 2012-March 2013) but as the evaluation reported levels of recall continued to grow, as did intention to visit, and positive perceptions have seen a step change. The evaluation noted that these were maintained over a relatively long period (over a year), when a dip may have been expected.

³⁴⁵ Tony McEnery, Amanda Potts and Richard Xiao (2013) *London 2012 Games Media Impact Study*

³⁴⁶ Tony McEnery, Amanda Potts and Richard Xiao (2013) *London 2012 Games Media Impact Study*

³⁴⁷ Ecorys (2013) *London 2012 Olympic and Paralympic Games – Visitor Survey Report* (see *Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games Economy Evidence Base*)

(iii) Soft power

The Games also offered an opportunity to increase the UK's soft power and ability to influence overseas and the Foreign and Commonwealth Office delivered a public diplomacy campaign across their network. A key objective of the activity was to bolster the UK economy, increase commercial opportunities for British business in target countries, and secure high value inward investment. To achieve these goals several types of activity were supported, including: events, films, documentaries, articles, interviews, and digital media. The evaluation of the campaign reports that posts worked with UKTI partners to target the right audiences and networks; promoted the expertise of British companies through screenings of the FCO documentaries (Going for Green and Game Changer); and sponsored media visits to the Olympic Park and companies involved in the build, as well as projecting the sustainability agenda through participation in local climate change and sustainability conferences and seminars. The evaluation assesses that messages about UK capability in delivering major infrastructure projects reached an audience of 120 million through the sponsored media visits and a further 597 million through screenings of 'Going for Green'. Journalists who attended the media visits almost unanimously agreed that as a result they now had a more positive opinion about the UK, seeing it as modern and innovative and providing leadership in sustainability, urban regeneration and green technology.

(iv) Investment

Stakeholders and businesses expressed opinion that the Games will generate higher numbers of inward investment enquiries and project successes both in London and across the UK, as well as increasing the potential for longer-term benefits by enhancing international business leader perceptions of London and the UK.

(v) Hosting sporting events

There is some evidence that London's successful bid to host the London 2012 Games had a positive impact on the UK's reputation for hosting major events. The number of major international sporting events taking place in the UK between 2013 and 2019 provides a strong indication that the UK's reputation abroad for hosting major sporting events has already been enhanced by the London 2012 Games. Between 2003 and 2012, 138 were held. The UK Sport's major events programme for the period 2013 to 2019, Gold Event Series, already has 70 events scheduled. Interviews with National Governing Bodies undertaken for the meta-evaluation indicate that the permanent venues have been a key factor in securing events up to 2017 including the European Hockey Championships at the Lee Valley Hockey Centre in 2015, and IAAF World Athletics Championships and World Paralympic Athletics Championships in 2017.

Study conclusions

8.11 How far have the investments in legacy initiatives represented value for money?

It was agreed at the outset that the focus of this element of the meta-evaluation would be on the value for money (vfm) of the legacy programmes. Any assessment of the full vfm of the Public Sector Funding Package will not be possible for many years and will need to be considered in any future evaluation work.

It is useful to consider the benefits of the Games – which would need to be compared with their total costs as part of the eventual vfm assessment – as being made up of a combination of:

1. The immediate 'consumption' benefits to those, in conventional appraisal terms, UK residents who watched or participated in some way in Games events. The expenditure of residents on ticketed events (some £544 million)³⁴⁸ provides a minimum estimate of these benefits. However, this excludes, of course, particular benefits both to those who

³⁴⁸ 82.5% of ticket sales based on London Organising Committee of the Olympic and Paralympic Games data.

- attended non-ticketed events, including the Torch Relay, and benefits to those who experienced the Games in other ways, especially through television;
2. Further psychological benefit, such as enhanced national pride, to the wider population which have not flowed directly from their personal experience of Games events and are not therefore encompassed within the immediate consumption benefits;
 3. Possible indirect benefits to people who may have been induced to make lifestyle changes such as increased participation in sport or volunteering as a result of the Games;
 4. Wider 'external' or public benefits associated in particular with the economic impacts of the Games or with the behavioural changes they may have induced. For example, possible savings in NHS expenditure if there is a longer term shift towards more active lifestyles.

Isolating and valuing effects 2, 3 and 4 will be far from straightforward but the key reason for deferring the vfm assessment is that there is only limited evidence on the scale of these effects at this stage and, more important, no evidence on how far those impacts which are observable at this stage are likely to be sustained.

The impact on GVA (the output of all domestically produced goods and services) is conventionally taken to be the key measure of the wider economic benefits of regeneration initiatives.³⁴⁹ However, a straightforward comparison between the public expenditure costs of the Games and the £28 billion to £41 billion GVA impact estimated by the economic modelling is somewhat misleading because a significant amount of the impact derives from the 'demand side' impacts of the public expenditure involved and comparable impacts could most likely have been achieved through similar levels of expenditure on other public programmes. One way to deal with this in the eventual vfm evaluation would be to exclude this aspect and to focus on the 'value added' to the time path of GVA excluding this element – in effect identifying the ongoing 'supply side' effects of the Games and the impacts from the stimulation of private investment/ expenditure.

(i) The legacy programmes

The assessment here is constrained by fact that the available evidence is limited and patchy: many of the legacy programmes have not in the event been subject to evaluation and, even where they have, vfm has often not been considered in any systematic and consistent way.

(ii) Sport

Little useful can be said about these programmes at this stage:

- The available evaluations of participation programmes such as Sportivate, Inspire, Free Swimming, Legacy Trust, Change 4 Life and Premier League 4 Sport do not include any quantitative assessment of vfm aspects which would require consideration of their possible longer term benefits. Investment is also still being undertaken in the key Sportivate and School Games programmes; and
- Evaluation of infrastructure will follow the publication of this report. In some cases, such as Inspired Facilities, Iconic Facilities and Protecting Playing Fields, the programmes are ongoing. The Olympic Park venues have yet to reopen in their new form, although high levels of usage are projected.

(iii) Economy

Evidence is available in relation to four areas which points to a positive picture:

³⁴⁹ It is arguably a very imperfect measure since it takes no account on one hand of the wider costs of additional economic activity (such as the opportunity costs in terms of time of any increase in employment or higher capital/depreciation, commuting, childcare or external costs such as pollution) or of its wider benefits (such as the psychological benefits of work).

- A key component of the economic legacy of the Games comes from trade and inward investment that has been secured because of the Games and the related promotional activity. The Government adopted a target of securing £11 billion of benefits by 2016, using events such as the British Business Embassy and overseas campaigns such as GREAT, and £10 billion of this has already been delivered: £2.5 billion of inward investment; £5.9 billion in additional sales for UK companies have been generated as a result of Games-related export promotion activities; and contracts totalling £1.5 billion have been won through the Government's Games-related High Value Opportunities programme;
- The CompeteFor Final Evaluation argues that a cost-benefit assessment of the initiative is not appropriate, presumably because its focus has been on opening up opportunities, essentially an equity objective, rather than generating net economic impacts. Nevertheless, it identifies potential GVA benefits of £72 million over the period to 2017 compared with expenditure so far of just £14 million³⁵⁰;
- Evaluation evidence but not a formal vfm assessment is available for the programmes to capitalise on the opportunities created by the Games or to counter their 'crowding out' type effects. As indicated in other parts of the report, these point to very encouraging impacts in terms of generating visitor spend (with a conversion rate in the range 1: 3 to 1:8 between expenditure on the first phase of one programme and the resulting visitor spend) and securing high levels of positive publicity and increasing potential future propensities to visit;
- The GLA Olympic Jobs Evaluation report identifies a ratio of benefits to costs of 1.65. Although it expresses some concern about the level of deadweight support for employment placements which would have occurred anyway, it concludes that the interventions were, "successful in terms of cost-effectiveness and efficiency when compared with benchmarks from similar labour market interventions".³⁵¹

(iv) Community Engagement

There has been limited assessment of the vfm of any of these programmes under this theme. Information on the costs of most of the activities has not been made public and it is not clear that good data is potentially available on aspects such as the number of hours contributed by volunteers which would be needed for a proper assessment. In relation to the operation of Legacy Trust, research commissioned by the Big Lottery Fund provides external validation that the Trust's model was effective. This research found that the costs of Legacy Trust UK were relatively low (in 2010/11 costs amounted to less than 5% of expenditure) and investment income had been used to increase programme expenditure suggesting considerable value for money for this Trust.

(v) Regeneration of East London

Only three of the available evaluations make direct reference to vfm:

- The Six Host Borough Project, one of the initiatives covered by the evaluation of the GLA labour market interventions evaluation summarised above, was found to be "good value" with a ratio of benefits to costs of 1.57;
- The evaluation of the LDA's investment in land acquisition and site preparation for the Olympic Park identifies the more than trebling of the average costs per hectare of the work as an issue for the eventual vfm of the Games and its legacy but argues that it is too early to make any robust and comprehensive assessment of these aspects³⁵²; and
- The economic impact study of the Westfield development argues that the effects of the Games in bringing forward the Westfield retail development by 5 to 7 years was worth

³⁵⁰ Evaluation Partnership (2013) *National Impact Evaluation of CompeteFor*. Final Report to Transport for London and Department for Business, Innovation and Skills

³⁵¹ SQW (2013) *Olympic Jobs Evaluation*. Final Report to the Greater London Authority. This does not take into account possible displacement of benefits from outside London.

³⁵² PwC and SQW (2011) *2012 Games Legacy Impact Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery*. Final Report to the London Development Agency.

between £1.1 billion and £2.2 billion to the London economy compared with the public expenditure involved of £0.6 billion, representing very or extremely good vfm depending on the precise figure used.³⁵³

(vi) Conclusions

It is too early to make any realistic judgements about the overall vfm of the public expenditure involved in hosting the Games. Some limited evidence is available in relation to the associated legacy initiatives, especially in relation to the Economic and East London themes. This is mostly positive though it would be unsafe to draw general conclusions from this.

8.12 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)?

At the time of writing, nearly one year on from the Games, there is generally limited evidence as to the extent to which many of the positive results and benefits from the Games have been sustained. Invariably this is simply because it is too early to tell. This is true for sports participation, volunteering, the perceptions of disability, and the extent to which previously unemployed people have continued in employment. The extent to which the Games have impacted in these ways will need to be assessed over the longer term.

However, based on the evaluation evidence available coupled with a large number of in-depth consultations with key stakeholders from across a range of public sector organisations it is apparent that the Games have helped to drive strategic change. This is particularly true for public sector organisations but there is also evidence of benefit for the private sector. These consequential or strategic benefits can be broadly categorised into three types:

- Coordination benefits – as organisations have developed new ways of working together as a result of the Games;
- Communication benefits – as organisations have developed better ways of communicating as a result of the Games; and
- Enhanced delivery capacity – as organisations have developed new skills, approaches and strategies as a result of the Games.

The remainder of this answer looks at each of these in turn and provides examples of the different benefits that have emerged. Although it should be noted that some of the benefits actually cut across all three types.

(i) Coordination benefits

From as early as the bid stage, the Games provided the primary driving force behind the coming together of the host boroughs to think collectively and sign up to the same legacy objectives. It was a joint working that not only provided a common and coherent strategic direction in terms of the Games legacy but it also resulted in the provision of a number of joint services including planning, building control and regulation. This joint working relationship was widely regarded by stakeholders to have proved extremely effective. With perhaps the best evidence of such being the on-going commitment to build on the level of trust, knowledge and good will created through the Games and to continue working together post-Games under the guise of the "Growth Boroughs". It is a coordinated approach that will ensure a strategic focus on the Convergence agenda is maintained while also thinking collectively about how best to deliver economic growth in this part of London. In a similar vein – albeit on a smaller scale – the work of the Nations and Regions Group also helped to establish regional networks of organisations that will continue to reap benefits for the respective regions post-Games.

A number of stakeholders also highlight the coordinating role played by the GREAT campaign and related promotion efforts and the effect that these have had on government's approach to international marketing outside of the Games. Stakeholders especially noted the value of the GREAT toolkit in bringing tourism and inward investment activities together. In addition, the

³⁵³ Volterra (2011) *Westfield Stratford City: The Inheritance before the Games*

GREAT campaign played a role in encouraging VisitBritain to work more collaboratively with other Government departments and agencies including the FCO, UKTI and British Council, on wider tactical approaches.

Coordination benefits were also prominent across the range of organisations and agencies responsible for the coordination of skills and employment initiatives. These include the linking in and joint working with other major construction projects as well as an enhanced focus on using sport, the arts and culture as a hook to raise aspiration and engage people – especially young people – in the labour market. Specifically, it was noted that the partnership structures established for LEST 2012 in London are likely to continue which will further improve the coordination and achievement of the longer terms skills and employment legacy.

Stakeholders also highlighted the role that the Games had played in catalysing improved partnership working across the many different organisations involved in sport from grass roots through to elite. In particular, stakeholders pointed to improved coordination between Sport England and local authorities in activities aimed at increasing participation.

(ii) Communication benefits

In terms of communication benefits, a number of stakeholders pointed to the fact that as a result of the Games there was now a large number of people from across government, its related agencies as well as the private and third sectors who now know each other and have experience of working together. It was an experience that many felt was not to be under-valued and an experience that stakeholders felt would continue to reap benefits over the longer term both as part of 'business as usual' (particularly in terms of a number of the benefits noted above) as well as for future major projects. The challenge, however, is to recreate – as far as possible – the spirit of joint endeavour that existed for the Games, for activities and projects on a much smaller scale.

(iii) Enhanced delivery capacity

Through the stakeholder consultations it was apparent that the 2012 Games had enhanced the delivery capacity of a number of different organisations in a range of different ways. This included:

- One government department noted that they had become "*more outcome focused*" and "*less frightened of complicated projects*" as a result of a strong programme and project management ethos that had been created as a result of the Games;
- Closer working between the public and private sector to understand their skills needs and to better match people to jobs;
- The reputational benefits for business that worked on Games contracts;
- Elevating the strategic importance of tourism and driving a new growth strategy for inbound tourism to Britain from 2012 to 2020, as "*tourism is now considered an important export industry across Government*";
- Maintaining flexible working practices that were introduced during the Games in order to increase productivity;
- The setting of new sustainability benchmarks for large-scale infrastructure projects (with Crossrail and High Speed 2 having already taken on key features of the ODA's strategy and procurement approach on sustainability) and across the events industry (in particular approaches to waste resource planning and sustainability management systems);
- The requirement for NGBs to deliver activities targeted at increasing sport participation – driven through contractual requirements with Sport England; and
- The use of approaches and toolkits developed in relation to the Games for on-going activity (for example the FCO's use of centralised strategic campaigns that can be adapted locally to best fit the local context).

8.13 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?

The previous section looked in considerable detail at the different lessons that have been learned about how to maximise the benefits to the host country and city from the staging of mega-events through the lens of each of the four themes. The purpose of this research question therefore is to synthesise the individual lessons from each of the four themes in order to identify in summary form the headline lessons that can be learned in relation to organisational operation and delivery. These are as follows:

- **The important of a clear legacy vision at the outset.** This early stage planning was seen as critical to ensuring that benefits were maximised as it enabled objectives to be agreed, and resources and responsibilities identified and allocated. Ideally those accountable for the longer term legacy should be involved in this process from as early a point as possible. While legacy planning was ingrained in the Games from an early stage, a number of consultees did note that the delay in creating a body responsible for championing legacy did mean that some opportunities were missed.
- **A clear remit and accountability structures for the organisations and partnerships responsible for delivering the Games.** Organisations were clear on what they were responsible for delivering and implementing. This meant that groups of organisations responsible for similar priorities and objectives were able to come together and to develop their own processes, structures and protocols for working together. All of this was underpinned by clear accountability structures. However, it should be noted, that this was not without challenge as individual organisations sought to strike the right balance between working as one towards a common goal and ensuring that the organisational specific needs and opportunities resulting from the Games were maximised.
- **The engagement and participation of key stakeholders from the outset.** This included organisations from across the public, private and third sectors as well as across national, regional and local structures. The focus was on engaging and joining up those stakeholders that needed to work together whether they had done before or not – working across normal organisational boundaries. It also meant that existing programmes and activities could be capitalised on and maximised.
- **The provision of adequate funding to support the objectives.** This includes both ensuring that funding is targeted and directed towards the key objectives as well as investing in high quality project management and delivery processes. The 2012 Games was characterised by the recruitment of high calibre leadership, with a desire to get the right person for the job whether that was from the public or the private sector. Importantly, in many cases, these individuals were members of organisations which reviewed, restructured, up-scaled their teams, and in some instances created altogether new ones, to deliver different phases of the project at different times. In the words of one stakeholder there was *"continual reinvention of organisations to reflect what the project demanded"*.
- **The need to remain flexible and to be able to change plans.** The most striking example of the need for flexibility was in the delivery model for the Games themselves and the need for that model to adapt to the wider economic context. But flexibility was also required because delivery was not a sequential process, but rather key activities and components needed to be planned and delivered in parallel.
- **The challenge of sustaining momentum and focus once the event is finished.** The absence of both the inspirational effect and the clear deadline of the Games does make partnership working more challenging as organisations and individuals naturally return to business as usual and their own organisation specific priorities. However, if delivery is to continue and the raised expectations of beneficiaries met then there is a need to ensure that joint endeavour continues beyond the immediate lifetime of the Games.
- **The value of sub-national structures.** There was clearly a shared understanding of a common agenda between national, regional and local agencies. It was a shared

understanding that was supported through a range of different sub-national structures from the Mayor of London to the nations and regions groups to other more localised structures. These structures were particularly valuable in ensuring that the benefits of the Games were distributed across the UK, but also in ensuring that local and regional efforts were coordinated and that key messages were communicated consistently.

Annex A: List of Research Questions

Harnessing the UK's passion for sport

Participation

- 3.2 To what extent and in what ways have the 2012 Games contributed to increased participation in sport and physical activity amongst adults, including disabled adults in the UK (before and during the Games)?
- 3.3 To what extent and in what ways have the 2012 Games contributed to increased participation in sport and physical activity amongst young people, including young disabled people in the UK (before and during the Games)?
- 3.4 To what extent has the goal been met of increasing the involvement of young people in competitive school sport?
- 3.5 How far have accessible opportunities for disabled people to participate in sport and physical activity been maximised, through supporting equality of access to Games-related participation programmes?
- 3.6 To what extent has the 2012 Games established the foundations for, and led to sustainable changes in participation in sport and physical activity?
- 3.7 To what extent has participation in sport and physical activity as a result of the 2012 Games resulted in wider social and economic benefits (in particular health and well-being benefits)?

Infrastructure

- 3.8 To what extent have the 2012 Games been used as an opportunity to secure the sporting infrastructure (personnel, investment and facilities) required to sustain a world class, high performance system, and support increased participation and elite sport across the UK?
- 3.9 How far have accessible opportunities for disabled people to participate in sport and physical activity been maximised (and specific barriers to participation been reduced) through Games-related investments in infrastructure?
- 3.10 To what extent and how have 2012 Games-related venues, facilities and personnel been embedded within local communities across the UK, and contributed to wider social and economic strategies and programmes?

Elite

- 3.11 To what extent and in what ways has hosting the 2012 Games been a catalyst for achievement in elite sport in the UK (including through identifying and nurturing talent)?
- 3.12 To what extent has there been an increase in young, talented disabled athletes being identified and nurtured (from school to elite competition level), as a consequence of the 2012 Games?
- 3.13 To what extent have elite UK sporting achievements (as a consequence of the 2012 Games and legacy investments) impacted on national pride and well-being?

International

- 3.14 To what extent has sport been used to achieve international development goals through the 2012 Games, specifically by providing more young people in developing countries with the opportunity to participate in high quality sport through International Inspiration?
- 3.15 How far has the UK been able to increase its influence on the role of sport in other countries, and on global sporting decisions, because of the 2012 Games or its legacy interventions?
- 3.16 To what extent have the 2012 Games enhanced the reputation of the UK abroad for hosting major sporting events (and made it easier for the UK to win and host future major events)?

Exploiting opportunities for economic growth

Economic modelling

- 4.2 What has been the economic impact of contracts relating to the preparation and staging of the 2012 Games, in terms of employment and GVA?

- 4.3 To what extent and in what ways have support interventions enabled UK businesses (across a range of sectors and including small and medium-sized enterprises and minority-owned businesses) to compete for and secure London 2012 supply contracts?
- 4.4 How has the delivery of 2012 Games-related contracts impacted on the long-term productivity and competitiveness of UK companies?

Promoting the UK as a place to invest

- 4.5 To what extent have the Games encouraged foreign-owned businesses to invest in the UK (and create associated GVA and employment) through influencing their perceptions of the UK as a place to invest, either through specific programmes or through the exposure the Games have provided?
- 4.6 To what extent have 2012 Games-related contracts helped to generate foreign direct investment (and associated GVA and employment) by encouraging foreign-owned companies to move their operations to and maintain their presence in the UK?

Export and trade promotion

- 4.7 To what extent has hosting the 2012 Games enabled UK businesses to move into new export markets (including through export promotion in host and other nations, in support of development goals, and through the development of 'soft networks'), and what were the GVA and employment benefits?

Tourism

- 4.8 To what extent have 2012 Games-related marketing campaigns inspired more people from overseas to visit the UK (thereby increasing visitor spend and creating new jobs)?
- 4.9 To what extent and in what ways has the staging of the 2012 Games impacted on perceptions of the UK as a place to visit?
- 4.10 What was the total impact of the 2012 Games on visitor numbers and spend (both domestic and overseas) across the UK?
- 4.11 What has been the impact of 2012 Games-related cultural events on visitor numbers and spend (both domestic and overseas)?

Employability and skills development

- 4.12 How many workless people were helped into sustainable employment as a result of preparing for and staging the 2012 Games and the conversion of legacy venues across the UK, and how?
- 4.13 How many people have developed new skills (and moved into sustainable employment) as a result of 2012 Games-related skills initiatives across the UK, and how?
- 4.14 To what extent have the 2012 Games been used to improve standards and access to employment opportunities amongst disabled people, including through volunteering, skills development and through changing employer perceptions?

Disability

- 4.15 To what extent have the 2012 Games been used as a vehicle to increase standards and access to business opportunities amongst disabled people?
- 4.16 To what extent have the 2012 Games resulted in increased standards and accessibility for disabled tourists visiting the UK (and associated levels of satisfaction and disabled visitors)?
- 4.17 To what extent have disabled people benefited from more accessible transport services and improved mobility, as a result of the 2012 Games?

Sustainability

- 4.18 To what extent was sustainability integrated into the planning, design and governance of the Games, and what were the practical benefits of this?
- 4.19 To what extent were the Olympic venues and Village designed and constructed in the most sustainable way, and what were the benefits of this?

- 4.20 To what extent did the Games involve sustainable procurement practices, and what were the benefits of this?
- 4.21 To what extent did the staging of the Games embody principles of sustainability, and what were the benefits of this?
- 4.22 To what extent did this influence and benefit the wider construction sector, public and private sector procurement, and the staging of events more generally?

Promoting community engagement & participation

Volunteering and social action

- 5.2 To what extent and how have the 2012 Games resulted in more active, cohesive and successful communities, including through inspiring more organisations to offer volunteering opportunities and building the capacity of the sector?
- 5.3 To what extent and how have the 2012 Games resulted in more active, cohesive and successful communities, including through inspiring more people (and especially young people and disabled people) to volunteer their time, and tackling the barriers to participation?
- 5.4 To what extent and how have the 2012 Games resulted in more active, cohesive and successful communities, including through inspiring people to set up their own 2012 Games-related activities, which engage people across the UK in the Games?
- 5.5 To what extent have any impacts been sustained, supporting the development of the Big Society?
- 5.6 To what extent have the 2012 Games resulted in more active, cohesive and successful communities through inspiring more people (and especially young people) to take part in cultural activities, and how?

Participation in culture

- 5.7 To what extent have the 2012 Games resulted in improved access to and participation in cultural activity amongst disabled people?
- 5.8 To what extent has Cultural Olympiad activity resulted in wider economic benefits, including through skills development, enterprise support and attracting visitors to London and the UK?
- 5.9 To what extent have any impacts been sustained (including through raising cultural investment and the profile of the arts, building sustainable partnerships, and inspiring future artists and audiences)?

Engaging children and young people

- 5.10 To what extent, and in what ways, have the 2012 Games positively affected the aspirations and pride of children and young people, including through educational activity to promote Olympic and Paralympic values?
- 5.11 What indications are there that relevant legacy interventions improved social and economic life opportunities for participating children and young people, and particularly hard-to-reach participants, and how was this achieved?
- 5.12 To what extent and in what ways did the Games inspire people to live more sustainably, and what were the benefits of this?

Engaging children and young people

- 5.13 To what extent have the 2012 Games increased levels of awareness and understanding of disability amongst young people and the general public (including through influencing media coverage and education legacy work at home and abroad)?
- 5.14 To what extent have the 2012 Games increased positive perceptions of and pride in the talents of disabled people (amongst both disabled and non-disabled people), through the work of UK broadcasters and through supporting and celebrating sporting, cultural and community achievements across the UK?

Driving the regeneration of East London

Transforming place

- 6.2 What have been the key lessons from the preparation of the site for the Olympic Park and Village?
- 6.3 How and to what extent has the rate and range of development activity and long-term management of the Olympic Park (and its venues and neighbourhoods) been secured?
- 6.4 What new transport links and accessibility improvements have been implemented in support of the Games and Olympic Park (and what benefits have these delivered for current and future residents and visitors)?

Transforming communities

- 6.5 How were the plans for the Olympic Park and the surrounding area (including the Legacy Masterplan Framework) developed in conjunction with the local community, and to what extent did they reflect the needs and aspirations of different groups?
- 6.6 To what extent have accessible new homes and leisure, education, health and community facilities been provided in and around the Olympic Park as a consequence of the Games, and to what extent are local people actively making use of the new facilities provided?
- 6.7 What has been the impact of the Park and venues on the recreational habits of East London residents, and their awareness of biodiversity?
- 6.8 How has the transformation of the Olympic Park and the surrounding area contributed to community cohesion, and what are the key lessons for the integration of existing communities?

Transforming prospects

- 6.9 To what extent did the preparation for and staging of the 2012 Games create job opportunities for more local residents (including in particular disadvantaged and disabled residents), and how was this supported?
- 6.10 To what extent has the transformation of the Olympic Park, legacy venues and local image encouraged business investment in the Park and surrounding area, creating at least 8,000 jobs across a range of sectors (including in hi-tech and sport and leisure, tourism and cultural industries), and how was this supported?
- 6.11 To what extent have training, work experience, and volunteer schemes associated with the 2012 Games contributed towards local people moving into employment beyond the Games?

Convergence

- 6.12 To what extent and how have the host boroughs responded to the 2012 Games and the Host Boroughs convergence agenda by delivering a more integrated approach to regeneration and the physical environment across East London, in terms of public realm, transport connectivity and new developments?
- 6.13 How, and with what success, have the Host Boroughs built upon the catalyst of the 2012 Games to help deliver the convergence of major socio-economic outcomes between East London and the rest of London (including education and skills outcomes, employment levels and benefit dependency, housing quality, health, crime, and participation in culture, sport and volunteering)?
- 6.14 What has been the longer-term impact of the 2012 Games on catalysing private and public investment in East London (and wider Thames Gateway area), and how did the Games influence the form, scale and timing of key investment decisions?
- 6.15 To what extent have the 2012 Games and legacy investments enhanced the image of and satisfaction with East London as a place to live (and for whom), and how has this contributed to social and economic change in the area?

Lessons Learnt

Sport

- 7.2 What lessons can be learned by host cities and countries about how to maximise the sporting and physical activity benefits from staging mega-events?

Economic

- 7.3 What lessons can be learned by host cities and countries about how to maximise the economic legacy benefits from mega-events?

Community engagement

- 7.4 What lessons can be learned by host cities and countries about how to maximise the Community Engagement legacy benefits (including cultural, educational and civic benefits) from mega-events?

East London

- 7.5 What lessons can be learned by host cities and countries in terms of how to maximise the regeneration benefits from mega-events?

Headline and cross-cutting research questions

Headline research questions

- 8.2 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?
- 8.3 What have been the economic impacts of the Games, particularly in terms of employment and gross value added (GVA)?
- 8.4 What have been the social impacts of the Games, particularly in terms of volunteering, the cultural sector and community engagement?
- 8.5 What have been the impacts of the Games on East London, and in particular socio-economic and organisational change?

Cross-cutting questions

- 8.6 How far have the beneficial impacts so far accrued to their intended target groups/communities (including across measures of equality, inclusion and diversity)?
- 8.7 How far have the Games changed attitudes to disability, and increased the participation of disabled people in sport, the economy, volunteering and culture?
- 8.8 How far have the Games contributed to sustainable development, in particular through demonstration effects and the encouragement of behavioural change?
- 8.9 In what ways have the 2012 Games and associated activity contributed to well-being?
- 8.10 What have been the impacts of the staging of the Games on the international profile and reputation of the UK, London and East London?

Study conclusions

- 8.11 How far have the investments in legacy initiatives represented value for money?
- 8.12 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)?
- 8.13 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?

Annex B: Note on National Audit Office Games Review

Department for Culture, Media & Sport

COSTS OUTSIDE THE PUBLIC SECTOR FUNDING PACKAGE IDENTIFIED IN THE NAO'S LONDON 2012 OLYMPIC GAMES AND PARALYMPIC GAMES: POST-GAMES REVIEW 5 DECEMBER 2012

The Department for Culture, Media and Sport formally wrote to the Public Accounts Committee in December 2012 and explained that the final meta-evaluation publication would provide an assessment of individual Games legacy programmes that fall outside of the Public Sector Funding Package. The following tables show the coverage of the costs highlighted in the NAO's Post-Games Review of December 2012³⁵⁴. Note that the values indicated here relate to the NAO's estimate of costs from their Post-Games Review and are not necessarily the same as those collated for the meta-evaluation. Cost information collated for the meta-evaluation can be found alongside the evidence of impact in the sections indicated below.

Item	Cost £ms	Coverage in meta- evaluation
Cost to LDA of purchasing Olympic Park Land	766.00	Yes (East London section)
NAO's estimated cost of delivering the legacy programme	826.00*	(see table below)
Costs incurred by Government Departments and Agencies on Olympics-related work	86.00	No as operational cost
Cost of staffing the former Government Olympic Executive	52.00	No as operational cost

³⁵⁴ National Audit Office (2012), *The London 2012 Olympic Games and Paralympic Games: post-Games review*

Department for Culture, Media & Sport

Item	Cost £ms	Coverage in meta- evaluation
Contribution from Homes and Communities Agency to Triathlon Housing Association's purchase of its 49% share of Olympic Village properties, for social housing	110.00	This contribution is not explicitly discussed, although the delivery of housing on the Olympic Park and its impacts are discussed in the East London section

The £826m asterisked item: "NAO's estimated cost of delivering the legacy programme" breaks down in the following elements which are itemised in an earlier NAO report : "Preparations for the London 2012 Olympic and Paralympic Games: Progress Report 6 December 2011."

Item	Cost £ms	Coverage in meta- evaluation
School Games - delivered by Youth Sports Trust	131.00	Yes (Sport section)
Places People Play – delivered by Sport England	135.00	Yes (Sport section)
Legacy investment in the Olympic Park from DCLG and GLA through OPLC/LLDC	332.00	This contribution is not explicitly discussed, although the legacy of the Olympic Park and its impacts are discussed in the East London section
International Inspiration – delivered by DCMS	26.00	Yes (Sport section)
Tourism marketing – delivered by Visit Britain	55.00	Yes (Economy section)
Employment and Skills – delivered by ODA and LOCOG	38.00	Yes (Economy section)
Business Legacy – delivered by BIS	10.50	Yes (Economy section)
Cultural Olympiad – funded by LOCOG and others	97.00	Yes (Community engagement section)
Inspire	1.60	Yes (Community engagement and sports sections)





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