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# LONDON LEGACY SUPRA-EVALUATION

## FINAL REPORT

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Centre for Sport, Physical Education & Activity Research (SPEAR)  
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# LONDON LEGACY SUPRA-EVALUATION

by the

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**This is an independent report commissioned by the Greater London Authority and London Councils from the Centre for Sport, Physical Education & Activity Research (SPEAR) at Canterbury Christ Church University. The evidence base for the report comprises a wide range of programme evaluations, reports, plans, strategies, policies and data. The analysis and summary measures of this evidence base included in this report have been independently conducted and developed by SPEAR, and any recommendations or suggestions are not necessarily endorsed by, nor do they represent the policy positions of, the Greater London Authority or London Councils.**

## CONTENTS

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<b>WHAT IS SUPRA-EVALUATION?</b>	page 2
<b>1) THE IMPRINT OF THE GAMES ON LONDON AS A PLACE TO LIVE, WORK, DO BUSINESS AND VISIT</b>	page 4
<b>1.1) Jobs &amp; Economy</b>	page 4
<b>1.2) Housing, Crime, Health &amp; Education</b>	page 6
<b>1.3) Physical Environment Transport &amp; Infrastructure</b>	page 7
<b>1.4) Business &amp; Commerce</b>	page 10
<b>1.5) Tourism &amp; Visitor Economy</b>	page 11
<b>SUMMARY</b>	page 13
<b>2) THE IMPRINT OF THE GAMES ON THE PEOPLE OF LONDON</b>	page 15
<b>2.1) Engagement</b>	page 16
<b>2.2) Work</b>	page 17
<b>2.3) Participation &amp; Behaviour</b>	page 19
<b>SUMMARY</b>	page 22
<b>3) THE IMPRINT OF THE GAMES ON POLICIES FOR LONDON</b>	page 24
<b>3.1) Governance of Games Infrastructure &amp; Legacy Delivery</b>	page 24
<b>3.2) Sustainability</b>	page 27
<b>3.3) Diversity &amp; Inclusion</b>	page 29
<b>SUMMARY</b>	page 32
<b>4) BEYOND 2013</b>	page 34
<b>ANNEX I) DEVELOPMENT OF BESPOKE MEASURES</b>	page 36
<b>ANNEX II) SOURCES OF EVIDENCE</b>	page 41

## WHAT IS SUPRA-EVALUATION?

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An event of the size, scope and scale of the Olympic and Paralympic Games will inevitably leave an imprint on the host city. For London, the challenge has been to shape that imprint to secure outcomes that positively impact upon London's places, people and policies. In short, the London legacy challenge has been to shape the imprint of the Games to enhance London life.

This implies that the imprint left by the Games is not a given, it is not something that London could passively expect as a result of hosting the 30<sup>th</sup> modern Olympic and Paralympic Games, nor is it something that London need passively accept. Consequently, the Mayor of London, London local authorities and other London stakeholders have invested in a range of programmes with the aim of influencing the imprint of the Games to achieve a positive legacy for London. Such programmes have included initiatives to enhance work opportunities for workless Londoners, increase physical activity and sport among the least active Londoners, and enhance the cultural life of all Londoners. Given the scale of the public sector investment in the Games and their imprint, it is to be expected that there should be a comprehensive set of evaluations of the outcomes of such investment. This London Legacy Supra-Evaluation has been designed and conducted to provide a comprehensible overview of these evaluations and the imprint of the Games on London life.

There are 96 programme evaluations, reports, plans, strategies, policies and data sources that provide the 'inputs' for this supra-evaluation (see annex II), and which collectively provide great detail on the imprint to date and potential future imprint of the Games on London life. However, the purpose of this supra-evaluation is not simply to aggregate all this detail, rather it is to distill and synthesise the evidence to articulate clearly, concisely and comprehensibly the holistic imprint of the Games. In order to do so, three summary measures have been identified in relation to the imprint of the Games on London life:

1. Estimates of the extent to which the Games have **accelerated development** in different areas and sectors in London are presented to summarise the imprint of the Games and Games-related programmes on London as a place in which to live, work, do business and visit.
2. Four broad **Londoner Groups**, each of which have experienced the Games and Games-related programmes in different ways, are presented to summarise the imprint of the Games and Games-related programmes on the people of London.
3. **Policy learning** in the form of critical success factors in delivering the Games and Games-related programmes, together with specific **potential policy legacies**, are presented to summarise the imprint and potential future imprint of the Games and Games-related programmes on policies for major events, public services and projects in London.

In developing these summary measures the supra-evaluation has sought to reach conclusions about what places and sectors have been affected by the imprint of the Games, who has been affected by the imprint of the Games, and what might be done in the future to capitalise on the imprint of the Games. Details of how the summary measures were developed are provided in annex I.

Of course, an important further question is what investments have been responsible for shaping the imprint of the Games on London life. As noted above, there has been an extensive programme of investment by the Mayor, London local authorities and other London stakeholders to attempt to positively shape the imprint of the Games on London. Consequently, an important role for this

supra-evaluation has been to identify the extent to which the shape of the imprint of the Games on London has been influenced by London resources. To this end, the scope of the supra-evaluation has been to include:

- Programmes or investments defined as “legacy” initiatives by those responsible for them.
- London legacy programmes and investments where London resources comprise either all or part of the funding or support.
- London legacy programmes and investments that would not have proceeded, or that would not have proceeded in the same way, without London resources.
- The London element of national legacy programmes such as Sportivate where London resources have been used to deliver the programme in London.

Throughout the supra-evaluation a narrative commentary is provided, derived from an analysis of programme inputs, on the extent to which the outcomes discussed have been either markedly or moderately influenced by London resources. Where there has been found to be marginal or no influence of London resources, outcomes have not been included in the analysis.

While the supra-evaluation focuses on the influence of London resources in shaping the imprint of the Games on London life, it does not include any commentary on cost-effectiveness. That is, the supra-evaluation does not seek to say whether the outcomes influenced by the investment of London resources have been *worth* the investment of those London resources. This deliberate exclusion is for two reasons. Firstly, the question of worth is inherently related to values and to what is valued, and it is not for the supra-evaluation team to comment on what should or should not be valued by Londoners. Secondly, given the long-term nature of some of the Games-related programmes in which London resources have been invested, the supra-evaluation has only been able to partially capture the shape of the imprint of the Games on London as the imprint will continue to be made and may continue to be shaped in the future. As such, any discussion of the worth of investment at this stage would inevitably also be partial.

This report is presented in three main sections relating to London's places, people and policies, and in each case the summary measure is presented as the final part of the section. In addition, a short final *Beyond 2013* section is included in order to highlight how some of the insights provided by the supra-evaluation might develop in the future. This final section includes a brief commentary on evidence that will become available in the future, on the extent to which outcomes may continue to develop, and on the future opportunities that remain for London led policy to shape the imprint of the Games on London life yet to be made.

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## 1) THE IMPRINT OF THE GAMES ON LONDON AS A PLACE TO LIVE, WORK, DO BUSINESS & VISIT

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### OVERVIEW

*The scale of the Olympic and Paralympic Games is such that this largest of mega-events will leave a significant imprint on the host city. However, the strategic opportunity offered by hosting the Games is that the imprint of the Games results from the accelerated development of projects, infrastructure and investment in areas that are important to the host city, rather than leaving facilities and infrastructure that have supported the hosting of the Games but that do little to enhance the host city as a place to live, work and visit. Through analyzing a wide range of data and reports on regeneration, socio-economy, transport, tourism and London's construction sector, it has been possible to estimate the extent of accelerated development in and around the Olympic Park, in the six Host Boroughs, for London's transport infrastructure and for the growth in London's tourism income. It has also been possible to identify an acceleration in capacity of London's construction industry to deliver sustainable practices. The data supporting these estimates are outlined in the sections that follow, and the estimates themselves are summarised in the final summary section.*

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#### 1.1) JOBS & ECONOMY

*Both evaluations of specific Games-related initiatives and macro-economic models of the impact of the Games on London are clear that there has been an impact on gross value added to the economy and on the generation of job years. However, a summative figure for gross value added and job years generated is not possible, as these evaluations and macro-economic models are not additive. Nevertheless, such impacts are important part of the evidence for the accelerated development of the Olympic Park area, the Host Boroughs, and various sectors across London attributed to the Games. The macro-economic models calculate impact largely derived from the £9.3bn public sector games budget which, given that around 20% originates from the London economy, might be considered to be moderately influenced by London resources. However, a more marked London contribution comes from political and planning support, whilst specific programmes for jobs and the economy, such as LEST 2012 and CompeteFor, are clearly markedly influenced by London resources.*

Between 2008 and 2010, the time that the most significant investments were being made in the physical and infrastructural preparations for the Games, labour market data from the Office of National Statistics<sup>1</sup> shows that working age unemployment rates rose by one quarter in London, compared with a rise of one third across the UK. The rise in unemployment in this period can, of course, be attributed to the wider economic downturn. While London unemployment rates rose significantly less sharply than those across the UK, this can provide only a context for the macro-economic impact of the Games, with the details of specific programmes and investments providing a much more reliable and robust indicator of the Games' impact on jobs and the economy.

Much of the macro-economic benefit is derived from investments from the public sector Games budget of £9.3billion, just over 20% of which is estimated to derive from London resources (see

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<sup>1</sup> ONS (2013) Labour Market Data Tables <http://www.ons.gov.uk/ons/taxonomy/index.html?nsl=Labour+Market#tab-data-tables> (accessed

appendix I). Such resources are a combination of London Council taxes, a GLA contribution, Londoners contribution to the exchequer through general taxation, and the contribution made by Londoners playing the National Lottery. Consequently, such impacts might be judged to be moderately influenced by London resources. Of course, in some instances, this moderate economic influence is supplemented by a more marked policy and political influence through supportive planning decisions and the early developmental influence of the London Development Agency.

Estimates derived from Oxford Economics' input/output model for the DCMS Meta Evaluation<sup>2</sup> examining the return on the £6.5bn Olympic Delivery Authority construction spend are of an impact between 2007 and 2012 of almost 46,000 job years and over £3.5 billion gross value added. Similarly, an analysis of data from the Westfield Stratford economic impact study<sup>3</sup> shows that the bringing forward of this development by 5-7 years has added almost £1.6 billion to the London economy and generated between 75,000 and 110,000 job years. Furthermore, it is clear that the Westfield Stratford development is one area where the facilitative influence of political and planning decisions in London made a marked contribution to the acceleration of investment.

In July 2012, Lloyds Banking Group<sup>4</sup> estimated the contribution of the Games to UK GDP. Further analysis of this data suggests a contribution to London GDP of £6.8bn between 2005 and 2017, with 70% of this impact estimated to have already taken place. Lloyds Banking Group suggest that over 80% of the contribution to GDP is derived from pre-Games and legacy construction activity, with a further 12% coming from tourism impacts (see section 2.5), and that there will be an impact on employment across the UK of 354,000 job years. Further analysis of this data suggests that this will include 130,000-150,000 job years in London.

Specific evaluations of the London Employment and Skills Taskforce for 2012 (LEST)<sup>5 6</sup> and the CompeteFor initiative<sup>7 8</sup>, both of which are clearly markedly influenced by London resources, show further macro-economic impacts. The interim evaluation of LEST, undertaken in 2010/11 and reported in October 2011, estimated that the programme generated £219 million Gross Value Added (GVA) for the London economy as a result of having supported 36,000 out of work Londoners into jobs by March 2011. An update of this evaluation in May 2013 showed that by the end of 2012 between 61,750 and 76,050 out of work Londoners had been supported into employment. Similarly, analysis of data provided in the interim evaluation of CompeteFor, the procurement portal established by the GLA for Games-related contracts, suggests that by February 2011 CompeteFor had generated circa £30 million of gross value added for London based businesses, although this estimate is based on a relatively small sample. Around 30% of businesses registered on CompeteFor for Olympic-related contracts were London based, and the evaluation shows that these London businesses had a "hit rate" of winning one contract for every 90 registered businesses, compared to 1 in 105 across the rest of the UK.

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<sup>2</sup> DCMS (2012) Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games – Report 4: Interim Evaluation.

<sup>3</sup> Volterra (2011) Westfield Stratford: The Inheritance before the Games.

<sup>4</sup> Lloyds Banking Group (2012) The Economic Impact of the London 2012 Olympic and Paralympic Games.

<sup>5</sup> PWC/SQW (2011) London Development Agency 2012 Games Legacy Evaluation Study: Appendix B – London Employment and Skills Taskforce for 2012.

<sup>6</sup> SQW (2013) Olympic Jobs Evaluation: Final Report.

<sup>7</sup> The Evaluation Partnership (2011) Evaluation of CompeteFor: Interim Evaluation Report

<sup>8</sup> The Evaluation Partnership (2011) Longitudinal National Evaluation of CompeteFor: Interim Evaluation – Executive Report for Scottish Enterprise.

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## 1.2) HOUSING, CRIME, HEALTH & EDUCATION

***One of the most ambitious Games-related development programmes is the Single Regeneration Framework which commenced in 2008/9. By the start of 2012, the Framework had accelerated the socio-economic development of the Host Boroughs by nine months across a range of indicators relating to community, health, education and crime. The goal of this programme, to achieve socio-economic convergence between the Host Boroughs and the rest of London by 2030, is underpinned by a marked investment of London resources in a wide-ranging programme of work towards the convergence goal. Other specific legacy programmes, particularly those to generate new housing in and around the Olympic Park site, have also contributed to convergence. Furthermore, the benefits of convergence are not just for the Host Boroughs, nor are they limited to London. Estimates suggest that UK GDP would have been higher and public borrowing lower at the start of the economic downturn if convergence had been achieved in 2008.***

While there are some examples of socio-economic benefits across London, the most marked investment of London resources, and the clearest benefits attributable to the Games and Games-related initiatives on housing, crime, health and education are within the six Host Boroughs. These are a combination of impacts from specific activities, such as those of the London Legacy Development Corporation<sup>9</sup>, and of the impact of the wide-ranging Strategic Regeneration Framework<sup>10</sup> on twenty diverse socio-economic indicators across the Host Boroughs<sup>11</sup>.

The Commission for a Sustainable London 2012 noted in its pre-Games report<sup>12</sup> that the Olympic Village has been built to the Code for Sustainable Homes Level 4 standard, the first development of this size at this level in the UK. This will provide almost 3,000 post-Games homes (2,818) at the highest standards of sustainability. Furthermore, the activities of the London Legacy Development Corporation from 2014-2030 are predicted to include the creation of 6,870 new homes, of which 35% (2,404) will be affordable and 42% (2,885) will be for families<sup>13</sup>.

Also providing information on housing, Lloyds Banking Group<sup>14</sup> reported in July 2012 that 3,850 new homes would be provided in the Host Boroughs of Newham and Hackney as a legacy of the Games. However, this report also suggests that there will be further related socio-economic benefits deriving from this provision. Specifically, Lloyds Banking Group estimate that benefits in terms of better health, fewer lost working days, lower NHS costs and reduced costs of crime will have a value of between £50 and £130million per annum over the next 20 years.

The clearest and most marked influence of London resources in relation to socio-economy is undoubtedly the Strategic Regeneration Framework, which commenced in 2008/9 and involves an Inter-Authority Agreement to close the gap in 20 socio-economic indicators between the Host Boroughs and the rest of London by 2030 as a sustainable legacy from the London 2012 Games<sup>15</sup>. Various convergence reports set out the programme of work and investments intended to achieve this<sup>16</sup>, and the post-Games convergence report<sup>17</sup> shows that at the start of 2012, 14 of the 20

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<sup>9</sup> London Legacy Development Corporation (2012) Socio-Economic Policy.

<sup>10</sup> Strategic Regeneration Framework (2012) Convergence Framework Annual Report 2011-12.

<sup>11</sup> Strategic Regeneration Framework (2010) Convergence Framework and Action Plan 2011-2015.

<sup>12</sup> Commission for a Sustainable London 2012 (2012) Breaking the tape – Pre-Games review.

<sup>13</sup> London Legacy Development Corporation (2012) Socio-Economic Policy.

<sup>14</sup> Lloyds Banking Group (2012) The Economic Impact of the London 2012 Olympic and Paralympic Games.

Strategic Regeneration Framework (2010) Convergence Framework and Action Plan 2011-2015.

<sup>16</sup> Strategic Regeneration Framework (2011) Strategic Regeneration Framework Progress Report 2009-11.



indicators were on track to achieve convergence whilst only one had worsened. While it might intuitively seem that the benefits of convergence are limited to the Host Boroughs, work by Oxford Economics shows that convergence benefits both the rest of London and the UK. In fact, Oxford Economics estimate that, had employment rates and productivity within the Host Boroughs matched the London average, at the start of the economic downturn in 2008 UK GDP would have been £5.9bn higher, and public borrowing could have been £4bn lower<sup>18</sup>.

Convergence data can be used to derive a measure of accelerated socio-economic development for the Host Boroughs. A comparison of the Host Boroughs' socio-economic progress since 2008/9 with a counterfactual scenario derived from socio-economic trends across London (see appendix I) suggests that the Games-related convergence programme had accelerated the socio-economic development of the Host Boroughs by nine months by the start of 2012, with community indicators relating to crime, housing and child poverty showing an accelerated development of 13 months, health indicators showing accelerated development of 12 months, and education indicators showing accelerated development of 9 months. The influence of the one convergence indicator showing a gap that has widened, that for median earnings, results in a decelerated development of 6 months in relation to work indicators. However, an indication of the disproportionate influence of the median earnings indicator is that if this indicator is regarded as an outlier and removed, the remaining work indicators show an accelerated development of 15 months. Moreover, if convergence continues towards 2030 at the pace that most recent report suggests that it will, then the overall accelerated socio-economic development of the Host Boroughs will very soon be measured in years rather than months as the marked influence of London resources within the Games-related Single Regeneration Framework continue to take effect.

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### **1.3) PHYSICAL ENVIRONMENT, TRANSPORT & INFRASTRUCTURE**

***The physical regeneration of the Olympic Park site is the most obvious physical legacy of the London 2012 Games. Evidence suggests that without the Games the site would have remained derelict and inaccessible for the foreseeable future, and as such it is not unreasonable to conclude that a conservative estimate is that the development of the area in and around the Olympic Park has been accelerated by at least ten years. The accelerated development of what will become Queen Elizabeth Olympic Park, together with the transport requirements of the Games themselves, has also led to a marked investment of London resources in transport infrastructure across London, including improvements in public transport accessibility and enhanced provision for walking and cycling, that collectively represent a 13 month acceleration in the development of London's transport infrastructure.***

At the heart of the legacy of the London 2012 Games is the original choice of East London as the location for the Games, and the specific choice of what became the Olympic Park as the site for the Games. Both independently commissioned evaluations, and those commissioned by London and national government agencies, have highly commended the choice of site as being the driver for many of the subsequent macro-economic and socio-economic outcomes identified in sections 1.1 and 1.2. The Royal Institute of Chartered Surveyors<sup>19</sup> gives its highest rating (10/10) to the choice of site as one where suppressed potential can be unlocked, whilst the Organisation for

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<sup>17</sup> Strategic Regeneration Framework (2012) Convergence Framework Annual Report 2011-12.

<sup>18</sup> Oxford Economics (2010) Six Host Boroughs Strategic Regeneration Framework – Economic Model.

<sup>19</sup> Royal Institute of Chartered Surveyors (2011) The 2012 Games: The regeneration legacy

Economic Co-operation and Development<sup>20</sup> cites and commends the long-term orientation of the Games towards regeneration. The London Development Agency evaluation<sup>21</sup> concludes that the long-term decision to focus the Games on East London (which it suggests would still have been a focus for regeneration without the Games), has led to a more integrated and comprehensive Olympic Park site and a more integrated timetable for regeneration that has brought economies of scale.

In the post-Games period in Spring 2013, the DCMS meta-evaluation<sup>22</sup> concludes that “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”. It further notes that this conclusion is based on an evidence base of reasonably high quality, and in support of this the specific East London evidence base annex runs to over 100 pages<sup>23</sup>. Previously, immediately after the Games, the meta-evaluation team concluded<sup>24</sup> that “East London already looks, feels and functions differently to how it did before London was awarded the right to host the Games, and perhaps more significantly to how it would have done had London not been awarded the right to host the Games”.

This evidence suggests that the development of the area in and around the Olympic Park was significantly accelerated by the choice to host the 2012 Games in East London, and that the end point that will be reached when Queen Elizabeth Olympic Park fully re-opens to the public in Spring 2014 will far exceed the extent of development that could have been achieved by any alternative regeneration projects that were planned to have taken place in the absence of the Games, even if such plans had gone ahead. An indication of this is that an estimate for the value of just the parkland elements of the Olympic Park site, provided by Lloyds Banking Group (July 2012) using a model developed by the Commission for Architecture and the Built Environment, is of a value of circa £500million for the post-Games green spaces in the Olympic Park and surrounding areas.

The DCMS meta-evaluation concludes that the Olympic Park site would have remained derelict for the “foreseeable future” in the absence of the Games<sup>25</sup>, and while there is evidence that alternative regenerative investment was *planned* to take place if the Games had not been awarded to London in 2005<sup>26</sup>, the economic downturn in the years that followed is likely to have severely restricted if not entirely excluded the possibility that such alternative regenerative investment would have *actually* taken place. Consequently, despite the existence of alternative investment plans prior to 2005 for a non-Games scenario, the assumed counterfactual for the Olympic Park site is that there would have been no regenerative investment in the absence of the Games (see appendix I). Given that the full re-opening of the park in Spring 2014<sup>27</sup> will mark ten years since the planning application for Olympic Park was submitted in May 2004<sup>28</sup>, it does not seem unreasonable to conclude that the development and regeneration of the area in and around the Olympic Park has been accelerated by *at least* ten years. Furthermore, as the site has

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<sup>20</sup> OECD (2010) Local Development Benefits from Staging Global Events: Achieving the Local development Legacy from 2012.

<sup>21</sup> PWC/SQW (2011) London Development Agency: 2012 Games Legacy Impact Evaluation Study Report.

<sup>22</sup> DCMS (2013) Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games – Report 5: Post-Games Initial Evaluation.

<sup>23</sup> DCMS (2013) Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games – Report 5: Post-Games Initial Evaluation (East London Evidence Base).

<sup>24</sup> DCMS (2012) Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games – Report 4: Interim Evaluation.

<sup>25</sup> DCMS (2013) Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games – Report 5: Post-Games Initial Evaluation.

<sup>26</sup> PWC/SQW (2011) London Development Agency: 2012 Games Legacy Impact Evaluation Study Report

<sup>27</sup> London Legacy Development Corporation (2012) Get Ready for the Future: Queen Elizabeth Olympic Park.

<sup>28</sup> PWC/SQW (2011) London Development Agency: 2012 Games Legacy Impact Evaluation Study Report.

developed not only farther, but also faster, as a result of the Games, this estimate is likely to be a conservative one.

Examples across London also suggest that developments for the Games have been a catalyst for wider public realm investments<sup>29</sup>, both new and brought forward. There have been improvements to transport interchanges at Hackney<sup>30</sup>, Walthamstow<sup>31</sup> and Leytonstone<sup>32</sup>, and improvements to the environment and access at Hackney Marshes, and in town squares such as Walthamstow. Offering a non-host Borough perspective, Camden notes that there were Games-driven improvements to Bloomsbury as a result of the location of the media transport hub in Russell Square. These included better walking and cycling facilities, improved traffic flow and access in and around Russell Square tube station and improvements to key walking routes<sup>33</sup>. Data across other London Boroughs<sup>34</sup> and specific evaluations and reports from individual Boroughs such as Brent<sup>35</sup> and Westminster<sup>36</sup> show that Games-led improvements to the public realm are perceived to exist across London. These range of investments are reflected in the post-Games London business survey<sup>37</sup> which showed that 80% of London businesses were confident there would be a regeneration and physical legacy of the Games, whilst two-thirds had specific confidence that transport infrastructure would be improved.

Both the Olympic Delivery Authority<sup>38</sup> and the GLA<sup>39</sup> note that approximately £6.5bn was invested in transport schemes and infrastructure that supported the Games, and that much of this work represented brought forward investment that was planned to take place in the longer term. Specific examples of such investment, cited by the Commission for a Sustainable London 2012 in their pre-Games report<sup>40</sup>, include an upgrade to West Ham tube station, a new Thames cable car system, a new Transport for London Co-ordination Centre, a £125m investment in Stratford Regional Station, and upgrades and increased capacity on the Docklands Light Railway and North London Underground Line.

Games-related transport investments have also impacted upon accessibility. Transport for London reports<sup>41 42</sup> show that 25% of London Tube stations were fully accessible to disabled people by the end of 2012 (up from 21% in 2010), including extensive improvements on DLR and Jubilee lines. 60% of London bus stops were fully accessible (up from 30% in 2008), and over 40% of London rail stations now have step-free routes. At the time of the Sydney Games in Australia in 2000 only 18% of buses were accessible and only 7% of stations could be classified as 'easy access'. Significant increases in Public Transport Accessibility Levels have taken place in and around Olympic Park, by two or more PTAL levels (on a six level scale) between 2010 and 2012-14.

Walking and cycling improvements carried out as part of the Games-related transport investment include greenways cycling routes, the expansion of Barclays Cycle Hire eastwards and better

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<sup>29</sup> DCMS (2012) Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games – Report 4: Interim Evaluation.

<sup>30</sup> London Borough of Hackney (2011) Hackney Local Implementation Plan 2

<sup>31</sup> London Borough of Waltham Forest (2012) Waltham Forest Local Plan Core Strategy.

<sup>32</sup> GLA (2012) Leaving a Transport Legacy

<sup>33</sup> London Borough of Camden (2012) Evaluation of the 2012 Olympic Programme in Camden

<sup>34</sup> London Councils (2012) Survey of London Borough Chief Executives

<sup>35</sup> Brent Council (2012) London 2012: Evaluation. Report from the Chief Executive.

<sup>36</sup> City of Westminster (2012) Cabinet Report: The Council's involvement in and preparations for the London 2012 Olympic and Paralympic Games – lessons learned and legacy report

<sup>37</sup> CBI/KPMG (2012) December 2012 London Business Survey.

<sup>38</sup> ODA (2012) Delivering Transport for the London 2012 Games.

<sup>39</sup> GLA (2012) Leaving a Transport Legacy

<sup>40</sup> Commission for a Sustainable London 2012 (2012) Breaking the tape – Pre-Games review.

<sup>41</sup> TfL (2011) Travel in London Report 4

<sup>42</sup> TfL (2012) Travel in London Report 5

streets streetscape improvements<sup>43</sup>. The long term potential of these schemes is in three areas: greater sustainable travel, increased physical activity, and enhanced physical environment. It is also expected that 95% of the 9 million visits (1.8million per year) made by Londoners to the Queen Elizabeth Olympic Park in the next five years will be by public transport, cycle or foot<sup>44</sup>. This will also therefore impact upon participation in sport and physical activity described in section 2.3.

The Commission for a Sustainable London 2012<sup>45</sup> notes that “the principle of the public transport Games”, together with accessible transport targets, led to the bringing forward of transport investments, and that around £5bn of the £6.5bn Games-related transport investment represented such accelerated investment. Transport for London investment plans for 2009-2018<sup>46</sup> show a clear increase in investment in the years leading up to the Games, and this represents a marked accelerated contribution from London resources. Comparisons with a counterfactual scenario in which investment over this period would have been £5bn lower in the absence of the Games show that the development of London’s transport infrastructure has been accelerated by over 13 months as a result of hosting the 2012 Games.

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#### **1.4) BUSINESS & COMMERCE**

***At a time that the construction sector in general has contracted, evidence suggests that the London construction sector has gained a benefit in terms of both direct impacts and better preparedness to bid for future work as a result of the Games, particularly in terms of an accelerated development of its capacity to deliver sustainable practices, and that these impacts might reasonably be regarded as moderately influenced by London resources. However, the marked investment of London resources in CompeteFor has led to greater access to tendering opportunities among London’s small and medium enterprises. In fact, London business as a whole has experienced, at the very least, an increase in confidence and optimism as a result of the Games, and this might be characterized as an accelerated recovery from the more pessimistic outlook brought about by the economic downturn.***

Despite some negative publicity around a lack of trade in central London during the Games, evidence suggests that London businesses are positive about the Games. The CBI London Business Survey<sup>47</sup> showed that post-Games more than 9 in 10 businesses felt the Games will help promote London internationally, a level that has held steady from pre-Games surveys. A quarter of London businesses responding to the CBI survey said their business had benefitted directly from the Games, which roughly matches the number that thought they would benefit pre-Games. The pre-Games Armitt Report for the DCMS<sup>48</sup> suggests that two-thirds of businesses that were involved in the Games were more optimistic about their future prospects as a result of their Games involvement, outnumbering those who were less optimistic by 9:1. Like other impacts that are derived from the investment of the £9.3bn public sector funding package, this might be considered to be moderately influenced by London resources.

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<sup>43</sup> GLA (2012) Leaving a Transport Legacy

<sup>44</sup> London Legacy Development Corporation (2012) Sustainability Guide to Queen Elizabeth Olympic Park.

<sup>45</sup> Commission for a Sustainable London 2012 (2012) Breaking the tape – Pre-Games review

<sup>46</sup> TfL (2009) Investment programme 2009/10 to 2017/18.

<sup>47</sup> CBI/KPMG (2012) December 2012 London Business Survey.

<sup>48</sup> DCMS (2012) Armitt Report: London 2012 – a global showcase for UK plc.

The Armitt Report<sup>49</sup> also shows that 39% of tier 1 ODA contractors on the Olympic Park trained employees specifically, with large companies focusing on health and safety and sustainability, and smaller companies on customer care and organisation. Half of contractors said involvement with London 2012 had developed capacity to deliver large projects and enhanced company finances. One third said it had encouraged the company to expand or diversify, whilst over two-thirds said it had enhanced their reputation in the sector. In terms of encouraging small businesses, LOCOG notes<sup>50</sup> that through the online business portal, CompeteFor, LOCOG was able to deliver 26% by value (70% by volume) of its procurement through Small to Medium Enterprises, with many more SMEs participating through lower tiers of the supply chain. Opening up the procurement process to SMEs was a key goal of CompeteFor<sup>51</sup>, an initiative that was markedly influenced by London resources, and the continuation of which for wider public sector procurement will be an important legacy of the Games for London's small and medium enterprises.

The Commission for a Sustainable London 2012 noted in its pre-Games report<sup>52</sup> that the skills and techniques learned within the construction industry in completing the Olympic Village to the Code for Sustainable Homes Level 4 would have a wide-ranging impact, and the Commission also notes that there is evidence that the construction industry is changing its attitude to sustainability, with some firms seeing it as a unique selling proposition in tendering. There are also examples that sustainability initiatives have saved money. For example, the decision to treat heavily contaminated soil on the Olympic Park site, rather than send it to landfill, saved £68m<sup>53</sup>. Two million tonnes of contaminated soil were cleaned and 98% of demolition material was reclaimed for reuse and recycling on site.

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### **1.5) TOURISM & VISITOR ECONOMY**

***The added tourism value of the 2012 Games will be realised over a period of ten years spanning the Games and continuing until at least 2017. A meta-analysis of economic models, which appears to be supported by emerging visitor data and research, suggests that the added tourism value of the Games in London will be £1.2bn by 2017, and that this will represent an acceleration of two years in the growth of London's tourism earnings. This impact can reasonably be regarded to be moderately influenced by London resources. However, a clear and marked influence of London resources has been in relation to tourist accessibility improvements, with 2012 seeing considerable improvements in accessibility perceptions for the visitor journey, shopping, eating out and the wider public realm.***

Three attempts have been made to estimate the impact of London 2012 on UK and London tourism. These were undertaken in 2004 (Adam Blake for the DCMS<sup>54</sup>), in 2007 (Oxford Economics for Visit Britain/Visit London<sup>55</sup>) and in 2012 (Oxford Economics for Lloyds Banking Group<sup>56</sup>). A forthcoming meta-analysis of these models<sup>57</sup>, which updates the older models in light of changing economic circumstances, and normalizes assumptions about visitor numbers across the three

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<sup>49</sup> DCMS (2012) Armitt Report: London 2012 – a global showcase for UK plc.

<sup>50</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report.

<sup>51</sup> The Evaluation Partnership (2011) Evaluation of CompeteFor: Interim Evaluation Report

<sup>52</sup> Commission for a Sustainable London 2012 (2012) Breaking the tape – Pre-Games review

<sup>53</sup> DCMS (2012) Armitt Report: London 2012 – a global showcase for UK plc.

<sup>54</sup> Blake, Adam (2005) The Economic Impact of the London 2012 Olympics.

<sup>55</sup> Oxford Economics (2007) The value of the London 2012 Olympic and Paralympic Games to UK tourism.

<sup>56</sup> Lloyds Banking Group (2012) The Economic Impact of the London 2012 Olympic and Paralympic Games.

<sup>57</sup> Weed M. & Shipway S. (2013 in press) Progress in Olympic Tourism Research: A Meta-Analysis of Olympic Tourism Flows and an Exploration of Leveraging Strategies

models on the basis of evidence from past Games and mega-events, provides the estimates below for the additional value that the Games has and will add to tourism in London.

**Additional Impact of London 2012 on Value of Tourism to London (2012 prices)**

2007-2011	2012	2013-2017	TOTAL
£222m	£268m	£704m	<b>£1,194m</b>

SOURCE: Weed & Shipway (2013 in press, *Tourism Management*) - meta-analysis of three computable general equilibrium / input/output models (Blake, 2004; Oxford Economics, 2007; Oxford Economics, 2012)

Oxford Economics suggest that the post-Games tourism estimate in the five years 2013-2017 represents the bringing forward of market growth from ‘emerging markets’ such as China that would have otherwise taken place towards the end of the decade<sup>58</sup>, and these estimates are reflected in both post-Games perception data among tourists from such emerging markets collected by Visit Britain<sup>59</sup>, and in post-Games visitor number growth shown in returns from the International Passenger Survey<sup>60</sup>.

Using data from the World Bank<sup>61</sup> on actual and projected tourism receipts for the UK and London, it is possible to develop a counterfactual scenario in which the year-on-year additional tourism value estimated to be attributable to the Games between 2007 and 2017 is not realised. A comparison of actual and projected tourism receipts with a counterfactual scenario in which there is no Games-effect on tourism shows that by 2017 the estimates for the impact of the 2012 Games on tourism will represent an acceleration of two years in the growth London’s tourism earnings.

Business and resident perceptions about tourism and the visitor economy certainly support estimates for a positive tourism impact. 82% of London business replying to the December 2012 CBI London business survey<sup>62</sup> are confident the Games will enhance the visitor experience and increase tourism, whilst London tracking data shows that in October 2012 71% of residents thought the Games promoted London around the world<sup>63</sup>.

Section 1.3 showed that there have been major accessibility improvements in London’s transport infrastructure resulting from a marked accelerated investment of London resources in preparation for the Games. Clearly, the knock-on effect of such investment should be a positive impact on the perceptions of accessibility among tourists. An evaluation of such perceptions by LiveTourism<sup>64</sup> showed that tourist accessibility ratings had improved considerably between 2009 and 2012 in relation to transport, shopping, eating out and the wider public realm, with perceptions of visitor attractions remaining static, and accommodation falling away slightly, although these latter two areas already had very high ratings in 2009 and so the scope for improvement was limited. The Paralympic Games in particular created heightened expectations for visitor access around London, and the LiveTourism evaluation concludes that “consumer access ratings have positively increased across the visitor journey” which “have a significant impact on the disabled visitor’s experience”.

<sup>58</sup> Oxford Economics (2007) The value of the London 2012 Olympic and Paralympic Games to UK tourism.

<sup>59</sup> VisitBritain (2013) Foresight Issue 111.

<sup>60</sup> ONS (2013) Travel and Transport Data Tables <http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Travel+and+Transport#tab-data-tables> (accessed: 10/5/2013)

<sup>61</sup> World Bank (2013) International Tourism Receipts <http://data.worldbank.org/indicator/ST.INT.RCPT.CD> (accessed 3/5/2013)

<sup>62</sup> CBI/KPMG (2012) December 2012 London Business Survey.

<sup>63</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

<sup>64</sup> LiveTourism/Arkenford (2013) Game Changer – An evaluation of London as an Accessible visitor destination.

While such improvements are clearly markedly influenced by London resources, and they are commended in the LiveTourism evaluation, there is a note of caution that there is still considerable work to be done in ensuring that 'Games time' improvements in visitor accessibility, and the motivation to deliver improved accessibility, do not lapse in the post-Games period.

While it is clear that tourism accessibility improvements are markedly influenced by London resources, the picture is less clear in relation to the influence of London resources on the added tourism value estimated to derive from hosting the Games. Simply hosting the Games is a major contributory factor to the tourism impact, and as such the London economy's 20% contribution to the public sector Games delivery budget suggests that at least a moderate influence on tourism impacts can be attributed to London resources. A further factor is the initiatives that have been put in place to leverage tourism to the Games, particularly the GREAT campaign and the YOU'RE INVITED brand<sup>65</sup>, together with London and Partners activities in and around the Games, such as Limited Edition London<sup>66</sup>. However, while London resources have played an important role in such tourism leveraging initiatives, as with the public sector Games budget they represent a minority, albeit a substantial minority, of the overall activity, and thus the additional tourism value estimated to be generated by the Games might most prudently be judged to be moderately influenced by London resources.

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## SUMMARY

- ***Development in and around the OLYMPIC PARK SITE has been accelerated by AT LEAST TEN YEARS...***

*The full re-opening of Queen Elizabeth Olympic Park in Spring 2014 will mark ten years since the planning applications for the park developments were submitted. Given the wider economic downturn in the intervening period, and a broad consensus across the evidence base that without the Games the area that will become Queen Elizabeth Olympic Park would have remained derelict and inaccessible for the foreseeable future, it is not unreasonable to assume that no such regenerative investment or development would have taken place in this period without the hosting of the Games, and therefore that development in and around Olympic Park has been accelerated by at least ten years, and that this accelerated development has been moderately to markedly influenced by London resources. Furthermore, the site has developed not only farther, but also faster, as a result of the Games, and as such this estimate is likely to be a conservative one.*

- ***In the first three years of the Single Regeneration Framework, the socio-economic development of THE HOST BOROUGHES has accelerated by NINE MONTHS...***

*The Olympic and Paralympic Games were a catalyst for the development of a Strategic Regeneration Framework for a marked investment of London resources in the six Host Boroughs that seeks to close the gap on 20 socio-economic indicators between the Host Boroughs and the rest of London within 20 years of hosting the Games. The Framework programme started in 2008/9, and by the start of 2012, across these indicators the socio-economic development of the Host Boroughs had accelerated by an average of nine months, with accelerations averaging a year or more in relation to community indicators for crime, housing and child poverty, and for health indicators. Progress to date suggests considerable further accelerations will be forthcoming in future years.*

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<sup>65</sup> VisitBritain (2013) Foresight Issue 111.

<sup>66</sup> DCMS (2012) Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games – Report 4: Interim Evaluation.

- **The development of LONDON'S TRANSPORT INFRASTRUCTURE has accelerated by THIRTEEN MONTHS...**

Over £6.5bn has been invested in London's transport infrastructure to support the delivery of the Olympic and Paralympic Games. This has particularly focused on upgrades to public transport systems, including accessibility improvements for over-ground rail and buses and the London Underground network. Investment has also taken place in infrastructure to support walking and cycling. It is estimated that the Games has brought forward a marked investment of London resources of over £5bn in transport, and that this has accelerated the development of London's transport infrastructure by over 13 months.

- **By 2017, the growth of LONDON'S TOURISM income will be accelerated by TWO YEARS...**

The added value of the Olympic and Paralympic Games to London's tourism income will be realized over a period of ten years spanning the Games and lasting until at least 2017. Such added value, which might reasonably be regarded to be moderately influenced by London resources, is estimated to be £1.2bn over this period. By 2017, this will represent an acceleration in the growth of London's tourism income of two years, which is largely attributable to the bringing forward of growth from emerging markets such as China that would otherwise not have happened until the end of the decade. A further and marked influence of London resources has been in relation to Games-driven improvements in perceptions of accessibility among tourists for the visitor journey, shopping, eating out, and in the wider public realm.

- **LONDON'S CONSTRUCTION INDUSTRY has experienced accelerations in the development of capacity to deliver sustainable practices, and in the recovery of optimism and confidence for the future.**

The drive for the London Olympic and Paralympic Games to be the first sustainable Games has led to an acceleration in the capacity of London's construction sector to deliver large scale projects through sustainable construction practices. London's construction sector, including small and medium enterprises, feels it has experienced a direct benefit from the Games but, more importantly, that it is now better prepared to bid for future work. Generally, this has been moderately influenced by London resources, although the marked investment of London resources in CompeteFor is responsible for much of the accelerated development of small and medium enterprises. London business as a whole feels it has experienced an increase in confidence and optimism derived from the Games at a time when the recovery of such optimism might have been expected to be slow following the economic downturn.

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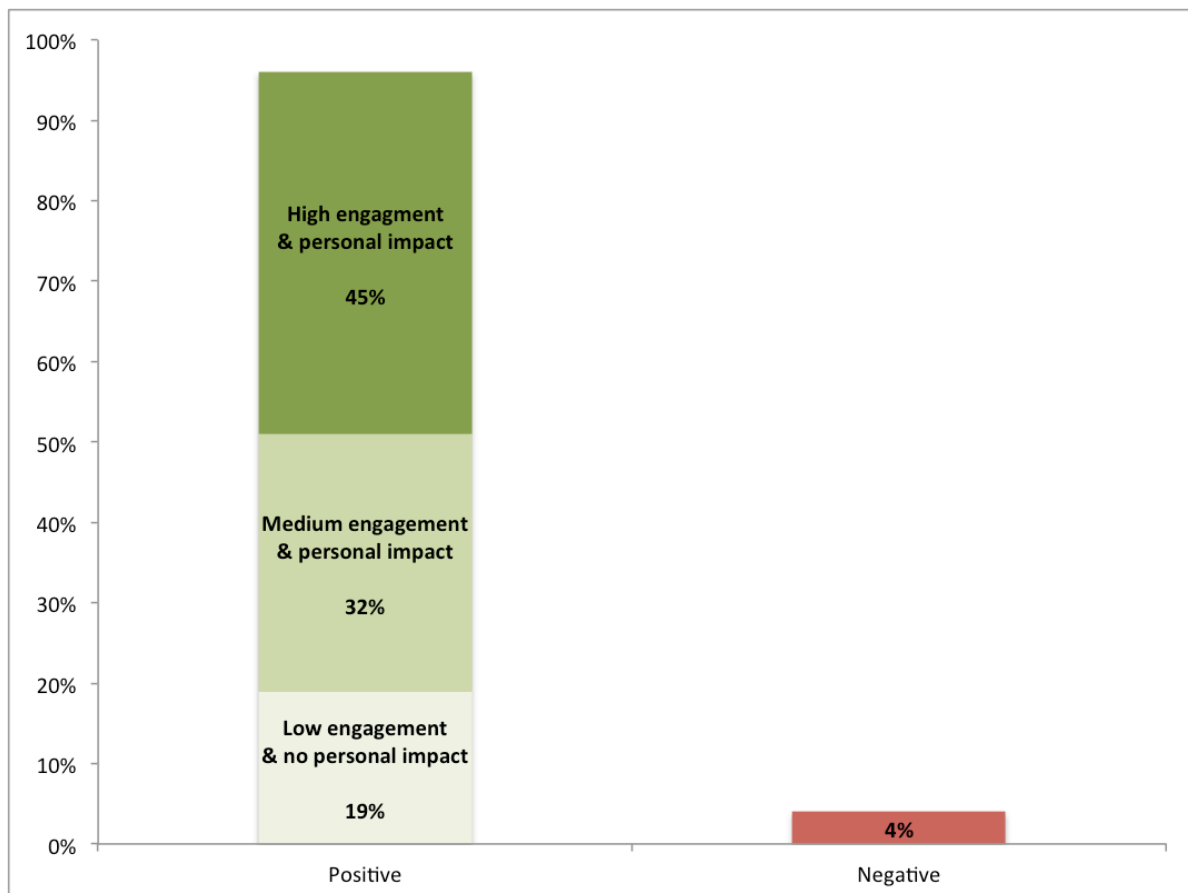


## 2) THE IMPRINT OF THE GAMES ON THE PEOPLE OF LONDON

### OVERVIEW

*The response of Londoners to the hosting of the Olympic and Paralympic Games in 2012 has been positive: 72% are broadly supportive<sup>67</sup> and 63% say they have experienced a personal benefit or positive behavior change as a result of the Games<sup>68</sup>. However, this overall average data does not provide a particularly granular insight into who has benefitted and how. Consequently, through an analysis of London tracking data, government surveys of cultural and sporting participation, and a specific government survey of residents in the Olympic and Paralympic Host Boroughs, it has been possible to identify four broad Londoner Groups, each with different experiences of, and views on, the hosting of the Games in London:*

- **96% of Londoners are broadly positive about the potential benefits of the Games for London, these Londoners can be split into three groups:**
  - **45% who are highly engaged and have felt a range of personal positive impacts.**
  - **32% who are less engaged and have felt some personal positive impacts**
  - **19% who are not very engaged and have felt no personal positive impacts**
- **4% of Londoners are negative, feeling that there will be no benefits for the city, they are not engaged and feel no personal positive impacts.**



<sup>67</sup> Taking Part statistical releases <https://www.gov.uk/government/organisations/department-for-culture-media-sport/series/sat--2> (accessed 10/5/2013)

<sup>68</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

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## 2.1) ENGAGEMENT

***In general, Londoners have supported the hosting of the Games, and remained positive post-Games. Those who were most engaged were most positive about the potential of the Games to deliver personal benefits or benefits for their area, whereas those who had not engaged with Games activities, or were unaware of them, were least positive about the potential for personal benefits, although the overwhelming majority still felt there would be benefits for London as a whole. Setting aside the 4% of Londoners who were entirely negative about the Games, the remaining 96% are roughly split down the middle between those who feel they AND their city have benefitted, and those who feel that their city has benefitted but that the benefits haven't touched them personally.***

Data from the Taking Part survey<sup>69</sup> shows that since the start of Games year support throughout the UK for London hosting the Games has increased, and levels of support for the Games in London during 2012 was around 3 percentage points higher than across England at 72%. This suggests that in general Londoners feel that the Games are a benefit rather than a cost to the city. This is certainly reflected in the Londoner Groups, where even among those who are not very engaged and feel no personal positive impact, over 88% still felt that the Games has or will benefit London in some way. The most recognized perceived benefits for London are the promotion of London around the world and the regeneration of East London, which remain high across all the positive groups regardless of the level of engagement and personal impact.

London tracking data<sup>70</sup> suggests that during and after the summer of 2012, around two-thirds of Londoners felt that the summer in London had been “a fantastic experience”, whereas only half of Londoners felt it would be before the summer. As such, expectations were clearly exceeded. 85% of those in the highly engaged and impacted group felt the summer of 2012 had been a fantastic experience, and even among those who were not very engaged and felt no personal impact over half (52%) agreed that the summer had been a fantastic experience in the city.

While London tracking data shows that since July 2011 a broadly static 1 in 5 Londoners feel their immediate local area is benefitting from the Games (although this rose to 1 in 4 during the Games)<sup>71</sup>, the DCMS survey of East London residents in the Host Boroughs (conducted in March/April 2012)<sup>72</sup> shows that twice this number, 2 in 5 Host Borough residents, felt the Games were currently benefitting their immediate local area, a level matched among the highly engaged and impacted Londoner Group, who are most likely to live in the Host Boroughs. In addition, around half of Host Borough residents believe their immediate area will benefit in the long term. This suggests that those living in the areas towards which most resources have been directed are more likely to feel that their area will benefit.

Families, those who feel their immediate area is benefitting, and those who were aware of the Mayoral and London Borough 2012 offer (which includes the cultural, events and sport activities and programmes offered by the Mayor and London Boroughs during 2012) were those who were

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<sup>69</sup> Taking Part statistical releases <https://www.gov.uk/government/organisations/department-for-culture-media-sport/series/sat--2> (accessed 10/5/2013)

<sup>70</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

<sup>71</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

<sup>72</sup> DCMS (2012) Olympic and Paralympic Host Borough Survey Statistical Release.

most positive, and this group was also most engaged<sup>73</sup>. Around two-thirds of those that felt highly engaged and impacted knew at least a fair amount about the Mayoral and London Borough 2012 offer, and around three-quarters engaged or participated in at least one part of this offer. This is a clear indication that at the broad level of engagement and positive attitudes, those activities that have been most markedly influenced by London resources, namely the cultural and sporting activities and events offered by the Mayor and London Boroughs, have had a clear positive impact on those that have engaged with them.

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## 2.2) WORK

***There has undoubtedly been a positive impact on work and training, some of which appears to be longer-term, but the magnitude of this impact is very difficult to estimate. Specific evaluations show a direct and positive impact on previously out of work Londoners and on those living in the Host Boroughs, but the Londoner Groups show that those more likely to live outside the Host Boroughs are less likely to recognise jobs for Londoners as a benefit of the Games, although they do recognise such impacts in the East London area. Furthermore, with the exception of the 4% in the Londoner Group entirely negative about the Games, those living outside the Host Boroughs do recognise other wider benefits for the city. Consequently, where London resources have been specifically invested in work and training initiatives, they have been successful in delivering positive outcomes for those targeted by those initiatives, namely those previously out of work and living in the Host Boroughs, who clearly recognise that they have benefitted. Moreover, while those that were not the target of work and training initiatives and investments have largely not felt a work and training benefit from the Games, and are less likely to perceive that there have been such benefits across London as a whole, they are likely to recognize that such benefits have been felt in East London, which is one of the most deprived areas, not only of London, but of the UK.***

Labour market data from the Office of National Statistics<sup>74</sup> shows that unemployment in London generally, and in the Host Boroughs in particular, fell during Games year, whilst unemployment across England rose slightly. However, the wider economic environment and other structural forces within the national and local economies mean that such data is not a reliable indicator of the impact of the Games on work and training. Furthermore, raw unemployment data does not capture impacts on skills and future employment potential. As such, the impact of the Games on work and training is most usefully explored through an examination of specific Games-linked initiatives and activities, most of which took place before the Games and were markedly influenced by London resources.

One of the major work and training initiatives, and one that was clearly markedly influenced by London resources, was the London Employment and Skills Taskforce for 2012 (LEST 2012), led by the former London Development Agency. The final evaluation of this programme in May 2013<sup>75</sup> showed that by the end of 2012 between 61,750 and 76,050 out of work Londoners had been supported into employment through Games-related programmes, whilst the earlier interim evaluation<sup>76</sup> noted that by March 2011 57,500 Londoners had benefited from employability

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<sup>73</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

<sup>74</sup> ONS (2013) Labour Market Data Tables <http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Labour+Market#tab-data-tables> (accessed 15/2/2013)

<sup>75</sup> SQW (2013) Olympic Jobs Evaluation – Final Report

<sup>76</sup> PWC/SQW (2011) London Development Agency 2012 Games Legacy Evaluation Study: Appendix B – London Employment and Skills Taskforce for 2012.

support and skills training. In July 2012 Lloyds Banking Group<sup>77</sup> estimated that training undertaken as part of the construction activity for the Games and its legacy will increase earnings to the value of £504million over the working lives of the recipients. Furthermore, the 3,000 formerly unemployed Londoners within the construction workforce, three quarters of whom live in the Host Boroughs, are each estimated to benefit by £40,000 in additional lifetime earnings as a result of being helped back into work. In fact, the DCMS East London resident survey<sup>78</sup>, undertaken in March and April 2012, shows that more than 80,000 Host Borough residents have benefitted, either personally or through an immediate family member, from employment relating to Games preparations. In addition, the Westfield Stratford development has provided over 15,000 permanent jobs in East London<sup>79</sup>, with the Stratford City Retail Academy matching 25% of the jobs that it placed to the long-term unemployed<sup>80</sup>. These specific initiatives are likely to have contributed to the results of the post-games CBI London Business Survey<sup>81</sup>, which show that around a third of London businesses were confident that the Games had strengthened the skills base in London.

Clearly, many of these specific initiatives, each of which are markedly influenced by London resources, have been targeted at those out of work, and those living within the Host Boroughs, and the data suggests that they have successfully reached these target groups. Such evaluation data is further supported by the Londoner Groups, which shows that those who most felt a range of personal positive impacts, who were also most likely to live in the Host Boroughs, were those most likely to suggest that the Games had and would bring more jobs for Londoners. Furthermore, even those groups less likely to live in the Host Boroughs, and less likely to perceive that they or their immediate area had experienced benefits, still recognised that the regeneration of East London, which brings inevitable associated employment benefits for the East London area, was a key benefit of the Games for London. The specific DCMS survey of East London residents<sup>82</sup> also showed that twice as many Host Borough residents felt the Games would increase job opportunities in their immediate area than felt they would not.

The equality and diversity impact of Games-related work and training initiatives has also been monitored. Of jobs placed by the Olympic Delivery Agency jobs brokerage, 17% were for women (against a target of 11%), 6% for disabled people (target 3%) and 60% for black, Asian and minority ethnic (target 13%)<sup>83</sup>. The London Legacy Development Corporation predicts that the Olympic Park workforce from 2014 will comprise 42% women, 10% disabled and 35% black, Asian and minority ethnic workers<sup>84</sup>. Such outputs reflect the maximum scores given by the IOC Olympic Games Impact study pre-Games assessment<sup>85</sup> to the employability of people with disabilities and to jobs created both in Olympic activities and in related context activities.

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<sup>77</sup> Lloyds Banking Group (2012) The Economic Impact of the London 2012 Olympic and Paralympic Games.

<sup>78</sup> DCMS (2012) Olympic and Paralympic Host Borough Survey Statistical Release.

<sup>79</sup> Volterra (2011) Westfield Stratford: The Inheritance before the Games.

<sup>80</sup> Commission for a Sustainable London 2012 (2012) Assuring a legacy – promises, progress and potential.

<sup>81</sup> CBI/KPMG (2012) December 2012 London Business Survey.

<sup>82</sup> DCMS (2012) Olympic and Paralympic Host Borough Survey Statistical Release.

<sup>83</sup> ODA (2011) Jobs Skills Future Brokerage <http://learninglegacy.independent.gov.uk/publications/jobs-skills-future-brokerage.php> (accessed 15/1/2013)

<sup>84</sup> London Legacy Development Corporation (2012) Equality and Inclusion Policy.

<sup>85</sup> UEL/TGIS/ESRC (2010) IOC Olympic Games Impact Study – London 2012 Pre-Games Report.

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### 2.3) PARTICIPATION AND BEHAVIOUR

**Overall, 2 in 5 Londoners felt they had lots of opportunities to get involved in the Mayoral and London Borough 2012 offer during Games year, and almost half of Londoners participated in or engaged with at least one part of this offer. Among those that were highly engaged and felt the most personal positive impacts, three quarters participated in at least one activity, and three times more people in this group knew at least a fair amount about the Mayoral and London Borough 2012 offer than those in the other Londoner Groups. Undoubtedly, this level of awareness has driven higher levels of engagement, with around 90% of the most engaged and personally impacted group feeling at least one positive effect in relation to sport, volunteering or culture. Of course, there may also be a reverse effect, where a desire to get involved leads to increased levels of awareness. As both awareness and engagement were associated with behavior changes in terms of public transport use, cycling and walking, healthy eating and community engagement, it is clear that the greatest impact on participation and behavior has been achieved where there has been the greatest engagement with initiatives markedly influenced by London resources.**

Data from Taking Part<sup>86</sup> shows that sport participation rates in London were higher than those across in England in 2010/11. However, during the following year London rates remained static whilst rates for England rose. In Games year sport participation rates in London rose again, but they were overtaken by participation rates across England as a whole. In contrast, since 2010/11 volunteering rates in London have overtaken those in England<sup>87</sup>, with the specific rate of increase between April 2012 and October 2012 being greater in London than across England. Arts participation rates in London remain below those across England, with both experiencing similar rates of increase immediately before, during and immediately after the Games<sup>88</sup>. However, such broad participation rates provide only a context to more specific data about the impact of initiatives influenced by London resources.

Clearly the most marked investment of London resources in sport participation is the Mayor's Sport Legacy Fund, for which only the pre-Games formative evaluation is currently available<sup>89</sup>. This formative evaluation shows that, since the start of 2011 and up to March 2012, over 140,000 people had been engaged across a number of programme strands. The target for these programmes is that 10% would be those previously inactive, and as of March 2012 around 15,000 Londoners involved in the programmes (just over 10% of those engaged) were previously inactive. However, what is not yet available is systematic data on the extent to which participants were retained within programmes, or their subsequent sport participation, although within one programme strand, Freesport, it is estimated that almost a third of participants went on to join clubs.

London tracking data<sup>90</sup>, which is less specific but more recent, shows that in October 2012 a third of Londoners (up from a quarter pre-Games) felt the Mayor was offering lots of ways to participate in sport during 2012, with less than a quarter feeling that such opportunities were not

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<sup>86</sup> Taking Part statistical releases <https://www.gov.uk/government/organisations/department-for-culture-media-sport/series/sat--2> (accessed 10/5/2013)

<sup>87</sup> Taking Part statistical releases <https://www.gov.uk/government/organisations/department-for-culture-media-sport/series/sat--2> (accessed 10/5/2013)

<sup>88</sup> Taking Part statistical releases <https://www.gov.uk/government/organisations/department-for-culture-media-sport/series/sat--2> (accessed 10/5/2013)

<sup>89</sup> Ecorys (2012) Formative Evaluation of the Mayor's Sports Legacy Fund: A Report to the GLA.

<sup>90</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

being offered. However, among the Londoner Group most engaged and feeling most personal impacts from the Games half thought the Games had brought more opportunities for Londoners to play sport, with almost the same number feeling that their personal opportunities to play sport had increased as a result of the Mayor's London 2012 sporting offer. Furthermore, six months after the Games, over three-quarters of the most engaged and personally impacted group said they had walked or cycled more, or that they were eating more healthily, or that they were using public transport more or were more engaged with their community, as a result of what they had seen or heard about London hosting the Games. Among Londoners as a whole, 40% said they were walking or cycling more or eating more healthily six months after the Games.

Sport England's Sportivate programme might be considered to be moderately influenced by London resources, as it is a national investment which draws on local resources for delivery. Evaluation data shows that over 18,000 14-25 year olds in London have engaged with the Sportivate initiatives, and that around three-quarters of these have been retained within the programme. However, both in 2011/12<sup>91</sup> and in the first six months of 2012/13<sup>92</sup>, retention rates in London have been lower than the average for England, which is over 80%, and this is in line with Taking Part data showing that despite increases in sport participation rates in London, rates of increase are lower than across England as a whole.

While around 24,000 Londoners, including 4,500 Host Borough residents, were part of the 70,000 Games Makers volunteer workforce for the Games<sup>93</sup>, it is the Team London Ambassadors programme that is most markedly influenced by London resources. Evaluation data collected through the Greater London Authority City Operations Directorate<sup>94</sup> shows that around a quarter of the 7,000 Team London Ambassadors had not volunteered before. However, the data also shows that the majority of those who said their experience as an Ambassador would make them more likely to volunteer again were those that had volunteered in the past, thus showing that while the programme had encouraged new volunteers, a more wide ranging impact is likely to be to increase levels of volunteering among those who already do so. An important further impact was that 1 in 5 volunteers feel their Ambassador experience has enhanced the way they do their job or has helped them gain employment, training or an apprenticeship, while around a third feel they have gained important personal skills such as team-working or increased confidence or self-esteem. Similarly, formative evaluation data for the Mayor's Sport Legacy Fund<sup>95</sup> showed that almost 7,000 sports volunteers had received a training grant as of March 2012, but three quarters of these had been volunteering for over a year. However, data also shows that almost 35,000 additional sport volunteering hours had been pledged by Londoners by March 2012. Taken together, this data suggests that activities most markedly influenced by London resources have had some impact on increasing the numbers of volunteers, but a more extensive impact on increasing the skills and number of hours volunteered of existing volunteers.

Further data on volunteering is available from a very small scale survey of the impact of the Inspire Mark programme<sup>96</sup>, for which there were 395 London-based projects reaching around 1.5 million Londoners. Across England as a whole, 77% of 290 project leads surveyed said that their project had encouraged volunteering. More specific and robust London tracking data<sup>97</sup> shows that 40% of Londoners said either they had first volunteered or volunteered more as a result of the Games, or

<sup>91</sup> Sport Structures (2012) Sportivate Programme Evaluation Annual Report (April 2011-March 2012)

<sup>92</sup> Sport Structures (2013) Sportivate Programme Evaluation Year Two Six Month Report (April 2012-October 2012)

<sup>93</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report.

<sup>94</sup> GLA Intelligence (2012) Team London Ambassadors Research Summary.

<sup>95</sup> Ecorys (2012) Formative Evaluation of the Mayor's Sports Legacy Fund: A Report to the GLA.

<sup>96</sup> Neilson/LOCOG (2012) Inspire Survey.

<sup>97</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

that they knew more about how to volunteer as a result of the Games, with this figure rising to 69% among those who were most engaged and had felt most personal impacts from the Games

London tracking data<sup>98</sup> shows that over a third of Londoners engaged with or participated in the Mayoral and London Borough cultural and events offer during the summer of 2012, which was about the same proportion who said they intended to do so before the Games. Most of these said they were attending more events than the previous summer. However, many of those who say they didn't know whether they would attend pre-Games did not actually do so. Those who did tended to be families, in work, and who felt they or their immediate area would benefit from the Games now or in the future. Among the most engaged and personally impacted group, over 60% engaged with or participated in the cultural and events offer.

Estimates derived from evaluations of London 2012 Outdoor Arts programmes, Showtime and Secrets<sup>99</sup>, suggest that over 400,000 Londoners experienced these programmes through various channels, with a further audience of around 100,000 originating outside the city. Over 90% of audiences were positive about their experience and said the events made London feel vibrant, while almost two-thirds said the events made them feel part of the Olympic and Paralympic Games.

The evaluation of Legacy Trust UK activities<sup>100</sup> shows that around £3m of the £40m available was invested in London to support the Big Dance programme. Like Sportivate, Big Dance harnessed local resources for delivery and implementation, and so it is reasonable to say it was moderately influenced by London resources. Because the programme involved a wide range of small-scale activities, robust overall participation and engagement data are not available. However, data from multiple sources<sup>101 102 103</sup> suggests a conservative estimate that the programme involved at least 65,000 Londoners as participants and engaged a cumulative London audience of over half a million.

The cultural, events and sport offer appears to account for much of the positive engagement of those in the most engaged and personally impacted group and in the medium engaged and personally impacted group that live outside the Host Boroughs. For example, in the London Borough of Brent, the two major Games related cultural events, Brent Celebrates the Flame and Brent Celebrates a Golden Summer each had attendances approaching 10,000<sup>104</sup>, while specific evaluations in Camden<sup>105</sup> and Westminster<sup>106</sup> reported an increase in cultural and sporting events and activities in 2012, and this was reflected in wider reports across London Boroughs<sup>107</sup>. In Camden, those saying they were inspired to participate in civic, cultural and sporting activities increased from 16% before the Games to 53% after the Games, with 54% saying they plan to continue to participate in such activities<sup>108</sup>.

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<sup>98</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

<sup>99</sup> Tom Fleming Creative Consultancy (2013) London 2012 Outdoor Arts: Showtime and Secrets – Evaluation Report.

<sup>100</sup> Janice Needham (2013) Legacy Trust UK Evaluation Report.

<sup>101</sup> Janice Needham (2013) Legacy Trust UK Evaluation Report

<sup>102</sup> Janice Needham (2012) Legacy Trust UK Interim Evaluation Report

<sup>103</sup> Annabel Jackson Associates (2012) Big Dance Evaluation Report.

<sup>104</sup> Brent Council (2012) London 2012: Evaluation. Report from the Chief Executive.

<sup>105</sup> London Borough of Camden (2012) Evaluation of the 2012 Olympic Programme in Camden

<sup>106</sup> City of Westminster (2012) Cabinet Report: The Council's involvement in and preparations for the London 2012 Olympic and Paralympic Games – lessons learned and legacy report

<sup>107</sup> London Councils (2012) Survey of London Borough Chief Executives

<sup>108</sup> London Borough of Camden (2012) valuation of the 2012 Olympic Programme in Camden

Across London as a whole, shortly after the Games in October 2012 34% of Londoners said that what they had seen and heard about the Games had encouraged them to go to more cultural events<sup>109</sup>. Further research in March 2013 indicated a diminishing level of influence as 16% reported that they are more interested in events and cultural activities in general as a result of what they had seen and heard during the Games<sup>110</sup>. However, 8% claimed that they are taking part in events and cultural activities more often which suggests that some of the previously reported intentions to participate in culture more often have translated into an actual behavioral change for some London residents.

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## SUMMARY

- **45% of Londoners are positive about the benefits for the city, highly engaged, and have felt a high level of personal positive impacts.**

This group have felt personal positive effects from the Games and Games-related cultural and sporting programmes. They are highly likely to say that they have changed aspects of their behavior as a result of things they have heard or seen about the Games. They were engaged with the Mayoral and London Borough London 2012 offer, and are very positive about the benefits of the Games for London.

This group contains more parents of young children (under 12) living at home, and more people under 40, as well as more residents of the Host Boroughs. It contains more of those who are likely to recognise cultural and sporting legacies, and more of those who were aware of the range of efforts made by the Mayor and the London Boroughs to enhance the Games experience for Londoners. There are less people in this group who live alone, or who are unemployed.

This group has benefitted significantly from the investment of London resources in Games-related initiatives.

- **32% of Londoners are positive about the benefits for the city, but they were less engaged and have felt less personal positive impacts.**

This group are positive about the benefits of the Games for London, and also largely feel there could be the possibility of some benefits for them or their immediate area. Some say they have changed aspects of their behavior as a result of things they have heard or seen about the Games, but only a minority were engaged with the Mayoral and London Borough London 2012 offer.

This group contains more people over 40 and fewer parents of children living at home. It contains more people who think there will be legacies for East London and the promotion of London internationally, but less people who recognise cultural and sporting legacies. There are less people in this group who knew much about the efforts made by the Mayor and the London Boroughs to enhance the Games experience for Londoners.

This group has felt some benefit from the investment of London resources in Games-related initiatives.

- **19% of Londoners are positive about the benefits for the city, but they are only slightly engaged and have felt no personal positive impacts.**

This group are very positive about the benefits of the Games for London. However, they are clear that they have not felt any personal positive effects nor changed their behavior as a result of the Games. Few were engaged with the Mayoral and London Borough London 2012 offer, and

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<sup>109</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

<sup>110</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.



they are highly likely to definitively say that there have not and will not be benefits for them or their immediate area.

This group contains more people over 50, and more people who are not working (including those who are retired). There are less people in this group who live in the Host Boroughs, and fewer who are parents of children living at home. There are also less people in this group that recognise cultural and sporting legacies, and fewer who knew much about the efforts of the Mayor and the London Boroughs to enhance the Games experience for Londoners.

This group has felt little benefit from the investment of London resources in Games-related initiatives.

- **4% of Londoners are negative, not engaged and have felt no personal positive impacts.**

This group are emphatically negative about the Games, and will definitively say that there have not and will not be benefits for London in general, for them personally or for their immediate area. They were disengaged from the Mayoral and London Borough London 2012 offer, and have not changed any aspect of their behavior as a result of things they have heard or seen about the Games.

This group contains more parents of older children (teenagers) living at home and more people over 45. It contains fewer Host Borough residents, but more people that do not recognise that any Games legacies are possible. There are few people in this group who knew anything at all about the efforts of the Mayor and the London Boroughs to enhance the Games experience for Londoners.

Those in this group believe they have felt no benefit from the investment of London resources in Games-related initiatives.

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### 3) THE IMPRINT OF THE GAMES ON POLICIES FOR LONDON

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#### OVERVIEW

***Before the Olympic and Paralympic Games commenced at the end of July 2012, the investment of London resources in preparations for the Games had already delivered some specific policy legacies for future major events in London relating to sustainable delivery, carbon footprinting methodology and transport planning and management. However, rather than focusing on the role London resources have played in the delivery of policy lessons to date, these sections focus on the potential future role of London resources in delivering policy learning and legacies for future major events and public services and projects in London.***

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#### 3.1) GOVERNANCE OF GAMES INFRASTRUCTURE & LEGACY DELIVERY

***Almost universally, the governance of Games infrastructure and legacy delivery has been commended by both stakeholder commissioned and independent evaluations, with legacy delivery structures being seen as a legacy in and of themselves. Critical success factors for governance have been long-term planning, the embedment of legacy into governance structures at an early stage, and an efficient, effective and innovative strategic assurance process. However, the most important critical success factor has been the unprecedented level of partnerships that have delivered integrated policy outcomes across sectors, which have, most importantly, been driven by a high profile, cross-party political will to deliver. This has led to some specific policy legacies, such as the enhanced capability and readiness of London's transport infrastructure to service future major events, and some potential legacies that would require the support of London resources, such as the establishment of an independent strategic assurance function for future London projects and public services.***

The Commission for a Sustainable London 2012<sup>111</sup> notes that “through effective governance, the Games Key Stakeholders have delivered against a highly coordinated set of objectives within an immovable timeframe. The achievement is impressive”. This outcome reflects the early confidence placed in policy systems for Games delivery by the Royal Institute of Chartered Surveyors in September 2011<sup>112</sup>, the IOC Olympic Games Impact Study pre-Games report<sup>113</sup>, and the Organisation for Economic Cooperation and Development peer review<sup>114</sup>, both in October 2010. Within London, 90% of London Boroughs rated Games wide governance as good or very good<sup>115</sup>.

A key success factor, identified by both the London Development Agency evaluation<sup>116</sup> and the Institute for Government<sup>117</sup>, was that London planned far in advance of any previous Games. For example: before bid launch (Jan 2004) a master plan for Olympic development had been drawn up; before candidate city shortlisting (May 2004) the planning application for Olympic Park was submitted; before the Games were awarded (July 2005) planning permission had been secured

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<sup>111</sup> Commission for a Sustainable London 2012 (2012) Assuring a legacy – promises, progress and potential.

<sup>112</sup> Royal Institute of Chartered Surveyors (2011) The 2012 Games: The regeneration legacy

<sup>113</sup> UEL/TGIS/ESRC (2010) IOC Olympic Games Impact Study – London 2012 Pre-Games Report..

<sup>114</sup> OECD (2010) Local Development Benefits from Staging Global Events: Achieving the Local development Legacy from 2012.

<sup>115</sup> London Councils (2013) Survey of London Borough Chief Executives

<sup>116</sup> PWC/SQW (2011) London Development Agency: 2012 Games Legacy Impact Evaluation Study Report.

<sup>117</sup> Institute for Government (2013) Making the Games – What government can learn from London 2012.

and land acquisition had begun; one year after the award of the Games (July 2006) the London Development Agency had assembled more than 90% of land needed by private agreement<sup>118</sup>. A further key success factor identified by the Institute for Government was a high profile political will to deliver, underpinned by genuine co-operation and buy-in across the political spectrum, which demonstrated to all the need for project outcomes and delivery to overcome actual and perceived barriers to cross-sectoral and cross-agency working. Further to this, in a series of Beyond 2012 stakeholder events<sup>119</sup>, and in an evaluation of strategic assurance by CAG Consultants<sup>120</sup>, it was noted that one of the barriers that might prevent lessons from the Games positively impacting on future major events or public services or projects might be the likely absence of the same high profile political will.

The Royal Institute of Chartered Surveyors<sup>121</sup> commends the embedment of legacy ambitions at an early stage and the pre-Games establishment of legacy co-ordinating agencies as key areas of good practice. However, the transition from the pre-Games delivery role of the Olympic Delivery Authority (ODA), through the initial legacy role of the Olympic Park Legacy Company, to the long-term role of the London Legacy Development Corporation, did not come without criticism, with the Commission for a Sustainable London 2012 initially feeling that the Olympic Park Legacy Company had been unambitious in its legacy planning<sup>122</sup>. However, in its final report<sup>123</sup> the Commission described the successor body, the London Legacy Development Corporation, as having an impressive approach to legacy, in which “the spirit of innovation embraced by the ODA at the beginning of the 2012 project has carried through to the legacy phase for the Park and surrounds”. In fact, the Commission sees the embedment of a commitment to seek higher sustainability standards within the London Legacy Development Corporation’s work as a key legacy of the delivery of such standards in the pre-Games period by the ODA<sup>124</sup>.

A further key legacy of the ODA’s work is the Learning Legacies project, which seeks to capture and make available online the lessons from the Olympic Park project<sup>125</sup>. This initiative has been commended by several evaluations<sup>126 127</sup>, and although its intention was and is to support the construction industry, the resources and lessons available reach into transport, health, town planning, project management, technological innovation and sustainability. As such it is a resource not only for construction, but also for future major events and public services.

Beyond the Olympic Park, other potential legacy structures are emerging. Transport for London reports suggest that the Olympic and Paralympic Transport Board (OPTB) and more recently the Games Transport Board (GTB) have fostered a collegiate ‘one team transport’ approach at all levels across all organisations to address transport issues affecting the Games<sup>128</sup>. Re-enforcing this approach, 65% of London Boroughs said their relationship with Transport for London had become stronger as a result of the Games<sup>129</sup>. Such arrangements have had impacts beyond efficient transport. For example, some of the active living behavior changes noted in section 1.3 are likely to be derived from the London 2012 Active Travel Programme, which included a strategic

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<sup>118</sup> PWC/SQW (2011) London Development Agency: 2012 Games Legacy Impact Evaluation Study Report.

<sup>119</sup> Commission for a Sustainable London 2012 (2013) Beyond 2012 – Outcomes.

<sup>120</sup> CAG consultants (2013) Independent evaluation of the Commission for a Sustainable London 2012.

<sup>121</sup> Royal Institute of Chartered Surveyors (2011) The 2012 Games: The regeneration legacy

<sup>122</sup> Commission for a Sustainable London 2012 (2012) Assuring a legacy – promises, progress and potential.

<sup>123</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>124</sup> Commission for a Sustainable London 2012 (2013) Making a Difference.

<sup>125</sup> <http://learninglegacy.independent.gov.uk/about/> (accessed: 4/5/2013)

<sup>126</sup> DCMS (2012) Armit Report: London 2012 – a global showcase for UK plc.

<sup>127</sup> Commission for a Sustainable London 2012 (2012) Breaking the tape – Pre-Games review

<sup>128</sup> ODA (2012) Delivering Transport for the London 2012 Games.

<sup>129</sup> London Councils (2012) London Borough Chief Executives Survey

partnership between TfL and NHS London, and the joint investment of £10m by the ODA and TfL in 2012 Games Walking and Cycling routes<sup>130</sup>, which endured despite the England-wide 2012 Walks project being cancelled in the comprehensive spending review of 2010. In order to maintain and reinforce these relationships, the GTB has undertaken to explore the merits of a UK/London Transport Board to continue after the Games, and the role of the Senior Transport Officers Group for future major events<sup>131</sup>. This has the potential both to improve future public services by ensuring the continuation of an integrated one team transport approach across London, but also to effectively service future major events in London by consolidating Games lessons into an off-the-shelf but customisable transport plan and co-ordinating structure for such future events that would obviate the need to develop bespoke arrangements from scratch.

The London Boroughs perceived that many of their relationships with pan-London agencies, such as the Metropolitan Police and NHS London, had become stronger as a result of joint working and collaboration relating to the Games. Across 20 London Boroughs that responded to a London Councils survey, 50 relationships with six key pan-London agencies were perceived to have become stronger, 69 stayed the same, and only one deteriorated<sup>132</sup>. All responding London Boroughs felt that at least some account had been taken of their Borough's requirements in wider Games planning, with 75% feeling that Borough requirements had been mostly or extensively understood and incorporated in to Games preparations by other agencies.

The Commission for a Sustainable London 2012 has been an important source of evidence in understanding the potential policy impact for London of the governance of Games infrastructure and legacy delivery. However, the concept of strategic assurance (largely shaped and developed by the Commission) has been identified as a potential legacy<sup>133</sup>. Although the Commission closed at the end of March 2013, the independent evaluation of its work by CAG consultants<sup>134</sup> supports the Commission's recommendation that future major developments and infrastructure projects should subject themselves to independent strategic assurance<sup>135</sup>. CAG found general support across all types of stakeholders for the concept of strategic assurance for major events, for other major projects, and for government decision making processes. The nature of strategic assurance is to focus on a proactive rather than passive approach to the formative assurance of plans, processes and emerging outcomes, rather than the summative retrospective audit that characterises more traditional quality assurance. A further critical success factor was found to be in the conduct and implementation of strategic assurance, with achieving and maintaining the trust of delivery bodies and combining a critical friend role with a more formal strategic assurance role being key.

The Commission for a Sustainable London 2012 closed at the end of March 2013, which led CAG to raise concerns about the strategic assurance of legacy in the absence of the Commission, noting "we see a strong case for the Commission to have been given a much longer life in order to provide assurance of the delivery of those Plans. This could have been in a scaled-down form focused just on the Legacy plans, funded by the LLDC, or could have been achieved through transferring staff to another organisation (most likely the GLA), which could then have provided assurance across major projects in London as a whole"<sup>136</sup>. While the re-institution of the Commission would not be appropriate, the potential wider role for the process of strategic

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<sup>130</sup> ODA (2012) Delivering Transport for the London 2012 Games.

<sup>131</sup> TfL (2012) Travel in London Report 5

<sup>132</sup> London Councils (2012) London Borough Chief Executives Survey

<sup>133</sup> Commission for a Sustainable London 2012 (2013) Beyond 2012 – Outcomes

<sup>134</sup> CAG consultants (2013) Independent evaluation of the Commission for a Sustainable London 2012.

<sup>135</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>136</sup> CAG consultants (2013) Independent evaluation of the Commission for a Sustainable London 2012.

assurance across London projects, public services and decision making suggests that there might be an opportunity to use London resources to establish a wider long-term strategic assurance function, perhaps within the GLA, within which the strategic assurance of legacy could be included.

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### 3.2) SUSTAINABILITY

***In October 2011, the IOC Olympic Games Impact study pre-Games sustainability analysis concluded that “the Games are being managed and financed in accordance with sustainability principles” but that the analysis says “little about the impact of those management and finance decisions”. Post-Games it is possible to be clear about such impacts: 80% of wider Games initiatives embedded sustainability within their programmes, with such embedment being identified as a critical success factor for the delivery of more sustainable construction, travel and food before, during and after the Games, and the longer-term sustainability of social and cultural outcomes. Similarly, an upfront commitment and political will to deliver more sustainable practice and increase knowledge and capacity has been a critical success factor in building sustainability capacity in the construction and food sectors. Specific policy legacies already delivered include new BS, ISO and GRI standards for managing sustainable events, and a predictive impact assessment methodology for carbon footprinting, while potential legacies that would require the support of London resources include the establishment of a collaboration to develop and disseminate the business case for sustainable construction procurement and the establishment of a group to develop and promote a Food Vision for Everyday Life.***

In various reports since its inception in July 2007, the Commission for a Sustainable London 2012 has noted that there can be no such thing as a sustainable Games unless it is possible to demonstrate that the use of resources to stage the Games is compensated by the development of more sustainable practices inspired by or as a direct result of the Games<sup>137</sup>. The Learning Legacies project highlighted in section 3.1 is one example of the way in which Games lessons might lead to such sustainable practices, and the Commission’s final report noted “on balance we believe there is sufficient evidence to conclude that sustainable practices inspired by London 2012 should outweigh the inevitable negative impacts of the Games over time”<sup>138</sup>. In its final sustainability report, LOCOG note<sup>139</sup> that key to delivering this sustainability outcome was the embedment of sustainability issues in strategy and planning from the start, and the subsequent location of members of the sustainability team throughout other departments as the organisation grew.

Across the wider Games related and inspired programme, there is also good evidence of the embedment of sustainability concerns. Twenty of the key projects and initiatives reported on in sections 1 and 2 that have been markedly or moderately influenced by London resources, from the Mayors Sport Legacy Fund, through the Transport Legacy Plan to the development of the convergence agenda and the Single Regeneration Framework, have been analysed for the extent to which they have considered sustainability issues. The overwhelming majority (80%) embedded sustainability concerns as a core part of the programme, while a further 15% acknowledged that there would be sustainability issues in programme implementation. Only one programme (5%) did not appear to consider sustainability issues at all. In some cases, sustainability was considered in its traditional environmental sense, such as the aim of the Transport Legacy Plan to reduce

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<sup>137</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>138</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>139</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report.

emissions through delivering a public transport Games and providing infrastructure for cycling and walking. However, for many initiatives the concept of sustainability focused on the sustainability of programmes and how, for example, the Showtime and Secrets initiative embedded delivery that explicitly aimed to enhance of artistic and cultural practice in London in the longer term<sup>140</sup>. One particularly positive example is the way the Team London Ambassadors programme has been sustained through developing into a wider call to volunteer to “do something great for your city”<sup>141</sup>, and through extending the role into schools to encourage children to become involved in social action at a young age<sup>142</sup>.

LOCOG suggest<sup>143</sup> that the critical success factor is an upfront commitment and investment in sustainability, which will pay major dividends over the lifetime of a project, both in direct cost savings and wider socio-economic benefits. It was suggested that the Games only scratched the surface of potential efficiencies and waste avoidance, with the Commission for a Sustainable London 2012<sup>144</sup> noting that the ODA achieved unprecedented levels of efficiency, with there being anecdotal evidence that having less packaging and precise ordering of material quantities leads to less unproductive work and hence greater efficiency. However, while section 2.4 noted that there has been an acceleration of the capacity of the construction industry to offer more sustainable practices, there also remains a need to require, or a least prefer, sustainable practices in procurement<sup>145 146</sup>. An important factor in ensuring client requirements for sustainability was the high profile political will to deliver a sustainable Games, and the Institute for Government notes<sup>147</sup> that such political will was, in most cases, supported by an appropriate budget. However, the Commission for a Sustainable London 2012 notes that while there is increasing evidence of sustainable practices and procurement for major projects, for more everyday small and medium sized public sector projects there is neither the political will nor the requisite budget to support sustainable practices. This is despite there being increasing evidence of a sound business case, at least at the macro-level, for preferring sustainable practices in procurement. As such, a key recommendation from the Commission’s Beyond 2012 stakeholder consultation<sup>148</sup> was to create a virtual collaborative community of organisations such as WRAP, the UK Green Building Council, and the Institute for Sustainability to help build the business case for sustainable construction and disseminate research, learning and best practice information more effectively. This would build on the Learning Legacies project noted in section 3.1, and could also capitalize on the success of the public sector procurement portal CompeteFor noted in section 2.1, which could provide a conduit to the business case for, and advice upon, the preferring of sustainable practices in procurement.

In terms of sustainable practice legacies already achieved, Games preparations led to the development of the BS8901 standard for event management, which has now been adopted as ISO 20121. This standard sets out a management system for managing the sustainability impacts for events, and LOCOG, the ODA, and GLA City Operations were all certified to this standard, with the London Legacy Development Corporation committed to achieving it<sup>149</sup>. Similarly, the Games has led to a bespoke version of the Global Reporting Initiative (GRI), which takes the well-established method for sustainability reporting used by many of the world’s major corporations and presents

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<sup>140</sup> Tom Fleming Creative Consultancy (2013) London 2012 Outdoor Arts: Showtime and Secrets – Evaluation Report.

<sup>141</sup> <http://volunteerteam.london.gov.uk/> (accessed: 24/5/2013)

<sup>142</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>143</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report.

<sup>144</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>145</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report.

<sup>146</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>147</sup> Institute for Government (2013) Making the Games – What government can learn from London 2012.

<sup>148</sup> Commission for a Sustainable London 2012 (2013) Beyond 2012 – Outcomes.

<sup>149</sup> Commission for a Sustainable London 2012 (2012) Assuring a legacy – promises, progress and potential.

a set of metrics that can be used for the event sector<sup>150</sup>. Finally, the Games pioneered a predictive impact assessment methodology for carbon footprinting which, like the BS, ISO and GRI standards, provides an important knowledge legacy for future major projects and events in London<sup>151</sup>.

LOCOG identifies key touch points for visitors during the Games as travel, food and waste, noting that all visitors would have to travel, would need to eat and drink, and would have rubbish to dispose of. In terms of travel, policies seeking a public transport Games delivered 89% of journeys to Olympic Park by rail or by walking or cycling<sup>152</sup>, with the Active Travel Programme contributing to both longer-term changed behaviour (see section 1.3) and providing a physical infrastructure legacy (see section 2.3). While there were clearly improved sustainability practices in construction that reduced waste, the Commission for a Sustainable London 2012 commends LOCOG's integration of waste, materials, food and packaging policies, which the Commission suggests demonstrates the benefits that can be gained by a systems-based approach. In particular, the Commission believes that the stronger the design and systems connection between these policies, the greater the likelihood of minimising residual waste.

The London 2012 Food Vision sought to deliver over 14 million meals during Games time from healthy, sustainable sources that would be affordable and reflect London's diversity<sup>153</sup>. The Vision was driven by strong representation from the London Food Group<sup>154</sup>, and there was a strong expectation that there would be a long-term legacy in terms of a supply chain capable of delivering enhanced sustainability. To this end, participants in a series of Beyond 2012 stakeholder workshops strongly recommended that to secure longer-term impact the "original members of the team that developed the London 2012 Food Vision should continue to be convened (possibly by the Mayor of London) to drive the Vision and Food Legacy Pledge forward so that it becomes widely adopted in everyday life"<sup>155</sup>. Both the Food Vision and the Food Legacy Pledge are highlighted as models of best practice that the Mayor of London should continue to promote, particularly in encouraging adoption by London Boroughs in their own premises. However, in its final report the Commission for a Sustainable London 2012 notes that the Food Legacy Pledge website hasn't been updated since September 2012, and that consideration should be given to providing resources to update and continue the pledge initiative, including an option for caterers to sign up and progress to the full pledge over time rather than the previous requirement for immediate compliance upon sign up<sup>156</sup>.

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### 3.3) DIVERSITY & INCLUSION

***80% of Games related programmes and initiatives markedly or moderately influenced by London resources have embedded the promotion of diversity and inclusion as a core programme element. While this has already delivered some impressive outcomes in terms of local procurement, Host Borough employment, the employment of under-represented groups, and accessibility in and around the Olympic Park and across the London Transport system, the key policy legacies are of the continuing embedment of active diversity and inclusion targets and activities within the work of the London Legacy Development Corporation and the Single Regeneration Framework which, with the continued support of London resources, should deliver***

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<sup>150</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>151</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report.

<sup>152</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report.

<sup>153</sup> LOCOG (2009) For starters – London 2012 Food Vision.

<sup>154</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>155</sup> Commission for a Sustainable London 2012 (2013) Beyond 2012 – Outcomes.

<sup>156</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

***diversity and inclusion outcomes for the next 20 years. Critical success factors for diversity and inclusion have been the scale of the early investment in the LEST 2012 programme, and the political will to further scale up the ambitions of the convergence agenda despite the economic downturn. The unprecedented level of partnership between London Boroughs, and between the Boroughs and pan-London agencies, such as the GLA and Transport for London, each of which have explicitly considered how their own initiatives can contribute to the convergence agenda, has also been a critical success factor.***

In its final post-Games report, A Legacy of Change<sup>157</sup>, LOCOG claims that an emphasis on diversity and inclusion, both in the supply chain and workforce, achieved demonstrable benefits in terms of employment and skills development in the Host Boroughs, and business benefits across all nations and regions of the UK. This is endorsed by the Commission for a Sustainable London 2012<sup>158</sup>, which commends both LOCOG and the ODA on “exemplary standards of local procurement and employment”, noting that critical success factors were the online procurement portal, CompeteFor, and employment support from the London Development Agency via the LEST 2012 programme, which led to LOCOG’s peak Games time employment including almost a quarter of staff from the Host Boroughs, and 39% who had been previously unemployed for more than six months<sup>159</sup>. However, perhaps more impressive are the targets set and largely exceeded by the ODA jobs brokerage over its lifetime and now taken up by the LLDC (see section 2.1). There is post-Games evidence that property developers across London are now setting diversity and inclusion targets, but none have replicated the ODA’s level of ambition<sup>160</sup>. This may be linked to the support received from public funds in the early stages of programmes targeting inclusive and local employment, before the economic downturn. Such funding, and particularly the LEST initiative, was undoubtedly a critical success factor in these achievements.

While part of the ODA’s inclusion programme was to ensure the construction process was accessible to disabled people, the Commission for a Sustainable London 2012 also notes that the ODA Inclusive Design Strategy set a new benchmark for accessibility of venues<sup>161</sup>, and that ODA venue design and LOCOG’s mobility strategies should be adopted as models of best practice for future major events. In particular, the Commission commends accessibility provision in the “Last Mile”, with spectator mobility services setting a new standard that the Commission believes major events should follow<sup>162</sup>. Section 2.3 also showed that there have been impressive accessibility improvements across London’s transport system driven by the Games. Beyond physical infrastructure, a specific Paralympic Legacy Group was established in December 2012 by the Mayor of London and central government<sup>163</sup>, with representation from a wide range of interested parties including leading disability charities, Disabled Peoples User Led Organisations (DPULOs), Paralympians, business, media organisations and sports bodies. While the goals here are to transform perceptions of disability, support sport participation opportunities and promote community engagement among disabled people, as yet outcome evidence is not available.

However, across the wider Games related programme an analysis of twenty key projects and initiatives reported on in sections 1 and 2 that have been markedly or moderately influenced by London resources shows that 80% have embedded diversity and inclusion, meaning that the active

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<sup>157</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report.

<sup>158</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>159</sup> LOCOG (2012) A legacy of change – London 2012 Post-Games Sustainability Report

<sup>160</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>161</sup> Commission for a Sustainable London 2012 (2013) Making a Difference

<sup>162</sup> Commission for a Sustainable London 2012 (2012) London 2012 – From vision to reality

<sup>163</sup> <https://www.gov.uk/government/policies/creating-a-lasting-legacy-from-the-2012-olympic-and-paralympic-games/supporting-pages/paralympic-legacy> (accessed 14/1/2013)



promotion of diversity and inclusion is a core part of these programmes. The remaining 20% of programmes, while not established to actively promote diversity and inclusion, do each explicitly acknowledge that diversity and inclusion needs to be considered in programme implementation.

One programme that seeks to actively promote diversity and inclusion is the Mayor's Sport Legacy Fund<sup>164</sup>. The Fund was commended by the Commission for a Sustainable London 2012<sup>165</sup>, which has been broadly critical of progress towards a sport, health and physical activity legacy, for being "both innovative and tackling hard to reach young people in London", although the Commission notes that the long-term impact is yet to be felt. Information on such long term impact will be provided when the full evaluation of the Mayor's Sport Legacy Fund is undertaken, but some examples, such as the delivery of over 8,000 "Be Inclusive and Active" online training courses to staff in London boroughs and community groups between September 2011 and March 2012<sup>166</sup>, suggest that good progress is likely.

The major London initiative to deliver diversity and inclusion outcomes is undoubtedly the convergence agenda embedded within the Single Regeneration Framework which, as section 2.2 shows, had accelerated the socio-economic development of the Host Boroughs on a range of indicators by nine months by the start of 2012. The Single Regeneration Framework action plan<sup>167</sup> provides both a policy lead on equity issues and an example of horizontally (across London Boroughs) and vertically (between Boroughs and pan-London agencies) integrated policy making, which has clearly been a critical success factor for the Framework. Moreover, there is consistent evidence of the Framework's convergence agenda being referred to in other policies and plans such as the Transport Legacy Plan<sup>168</sup> and the NHS London Games Legacy Directory<sup>169</sup>.

The Royal Institute of Chartered Surveyors<sup>170</sup> specifically commends the scaling up of ambition and investment in the Single Regeneration Framework at a time when budgetary pressures led to many other programmes being scaled back or cancelled, and this political will and ambition to deliver the convergence agenda has been a further critical success factor for the framework. Furthermore, although the Framework has already delivered accelerated socio-economic development within the Host Boroughs, it is set to continue until 2030 and, as such, the continued focus on diversity and inclusion that will be provided by the Framework in the next twenty or so years is, itself, a tangible policy legacy of the 2012 Games.

The full impact of the Single Regeneration Framework and of the range of initiatives being delivered in and around Olympic Park by the London Legacy Delivery Corporation will not be realised for many years. The National Audit Office<sup>171</sup> and the Institute for Government<sup>172</sup> note that the same is true of many of the policy legacies of the Games, which require both time and further investment of London resources to deliver their full potential for future major events and for public services and projects in London.

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<sup>164</sup> Ecorys (2012) Formative Evaluation of the Mayor's Sports Legacy Fund: A Report to the GLA.

<sup>165</sup> Commission for a Sustainable London 2012 (2012) Breaking the tape – Pre-Games review

<sup>166</sup> Go London (2012) The London 2012 Games Legacy: Better Health for Londoners.

<sup>167</sup> Strategic Regeneration Framework (2010) Convergence Framework and Action Plan 2011-2015.

<sup>168</sup> GLA (2012) Leaving a Transport Legacy

<sup>169</sup> Go London (2012) The London 2012 Games Legacy: Better Health for Londoners

<sup>170</sup> Royal Institute of Chartered Surveyors (2011) The 2012 Games: The regeneration legacy

<sup>171</sup> National Audit Office (2012) The London 2012 Olympic and Paralympic Games: post-Games review.

<sup>172</sup> Institute for Government (2013) Making the Games – What government can learn from London 2012

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## SUMMARY

### **POTENTIAL POLICY LEARNING – critical success factors in delivering Games-related initiatives.**

- **Political will and partnership**

*Across policy areas, unprecedented levels of partnership and a will to sustain investment despite the economic downturn have been identified as critical success factors. Underpinning such partnership and investment has been a high profile political will to deliver a successful Games, and this has meant that all stakeholders have been clear that outcomes were non-negotiable and that it was expected that processes and partnerships would develop or adapt to deliver such outcomes.*

- **High expectation, transparency and embedment**

*At a very early stage high expectations to deliver not only a successful Games, but also to do so setting high standards for governance, sustainability and diversity and inclusion, have been clearly stated and transparent. This led to the early embedment of such standards in Games structures and initiatives, with the overwhelming majority of programmes seeking not simply to comply with standards, but to actively promote sustainability, diversity and inclusion.*

- **Integrated outcomes**

*At the macro-level, integrating the successful delivery of the world's largest sport event with the legacy impacts described in sections 1 and 2 is a considerable achievement. Doing so has required a pervasive integration of multiple outcomes within Games programmes. The transport legacy plan, for example, outlines how its outcomes contribute to the convergence agenda of the Single Regeneration Framework, and to physical activity goals through its active travel programme.*

- **Strategic Assurance**

*Central to the successful delivery of both the Games and its legacy impacts has been the transparent submission of Games preparation plans and programmes to a process of strategic assurance. In fact, the Games assurance process has largely defined the concept of strategic assurance, which is characterized by a proactive approach to the formative assurance of plans, processes and emerging outcomes, rather than a summative retrospective audit.*

### **POTENTIAL POLICY LEGACIES – future policy impacts of Games-related initiatives**

- **For future events in London...**

- i) **Sustainable delivery standards BS8901 and ISO20121**
- ii) **A predictive carbon footprinting methodology**
- iii) **Learning Legacies online resource**
- iv) **An 'off-the-shelf' customizable framework for transport management**

*The first three of these specific potential legacies for future events in London are available now and, indeed, are not limited to London events. They are derived from the £9.3bn public sector Games funding package and, as such, are moderately influenced by London resources. They are potential policy legacies because in order to have a future policy impact (i) and (ii) need to be adopted for future events in London, either on an event-by-event-basis or more systematically as part of long-term major event planning, whilst the take up and use of (iii) needs to be promoted among both private and public sector event organisers, planners, clients and contractors. The*

*fourth specific potential legacy for future events is derived from the marked investment of London resources in Games transport planning (iv). However, the future policy impact of this potential policy legacy requires a minimal further investment of London resources to ensure a customizable framework and co-ordinating structure for transport planning is captured in a usable off-the-shelf format for future events in London.*

- **For future public services and projects in London...**

- v) A strategic assurance function**

- vi) A collaborative community to develop the business case for sustainable construction**

- vii) Positive public sector procurement policies**

- viii) A Food Vision for Everyday Life**

- ix) The Strategic Regeneration Framework**

*Each of these five potential policy legacies for public services and projects in London require a further investment of London resources to secure future policy impacts. The strategic assurance process has been highly commended by both Games stakeholders and the independent evaluation of strategic assurance, with the latter suggesting that the Greater London Authority establish a strategic assurance function for future major projects in London (v). Games stakeholders have also suggested, as part of a post-Games consultation, that a collaborative community be established to advocate and develop the business case for sustainable construction practices (vi). While there is evidence that capacity to delivery sustainable practices has developed among contractors, positive public sector procurement policies are necessary to require, or at least prefer, such sustainable practices (vii). Positive procurement policies can also contribute to diversity and inclusion through delivering local procurement and providing access to the procurement process to small and medium enterprises, which has a positive secondary effect on local employment and training. There is a key role for London resources to play in sustaining, developing and integrating CompeteFor and the Learning Legacies resource to support positive public sector procurement policies that can deliver these wider social and environmental outcomes.*

*The London 2012 Food Vision, driven by London resources via the London Food Board, has been widely acknowledged to have delivered food that was both healthy and sustainably sourced and that reflected London's diversity. Games stakeholders and the Commission for a Sustainable London 2012 both recommend that the Mayor of London should continue to convene the Food Vision team to: develop a Food Vision for Everyday Life; update and support the Food legacy Pledge website; and actively encourage the adoption of an everyday food vision by London Boroughs for their own premises (viii).*

*Finally, while the Strategic Regeneration Framework has already delivered accelerated socio-economic development within the Host Boroughs, the Framework is set to continue until 2030. Clearly a sustained and marked investment of London resources and, perhaps, investment from national government, across both the current initiatives outlined in the Framework Action Plan and such future initiatives as might be required to keep convergence on track, will be required to achieve convergence by 2030.*

*Across all potential policy legacies for future public services and projects in London (v-ix), but particularly for the delivery of convergence (xi), the continued positive influence of the four critical success factors identified will be crucial.*

#### 4) BEYOND 2013

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As noted in the introduction, the London Legacy Supra-Evaluation can only provide a partial insight into the imprint of the 2012 Olympic and Paralympic Games on London life because from the perspective of the Spring of 2013, this imprint has only been partially made. While it has been possible in some areas, such as tourism and the visitor economy, to provide projections for the likely future imprint of the Games, in other areas the supra-evaluation is a progress report rather than a complete summative assessment.

Given that the full imprint of the Games on London life is yet to be made, there remain further evaluations and sources of information that will become available in the future. The IOC sponsored Olympic Games Impact study will report in 2015. Similarly, although the Post-Games Initial Evaluation report from the meta-evaluation of the Games commissioned by the DCMS will be published in late-Spring 2013, the yet to be commissioned longer-term part of the meta-evaluation is not due to be completed until 2020. Each of these reports will look beyond London to the UK as a whole. However, for London, continued annual reporting on progress towards convergence through the Single Regeneration Framework can be expected in the autumn of each year, until 2030.

Data will continue to become available at quarterly intervals from the Taking Part survey, and at six-monthly intervals from the Active People survey, within which London statistics are disaggregated. There are also a range of data that will continue to become available from the Office of National Statistics, such as labour market data on unemployment and working age employment. However, care should be taken in using such data in isolation to assess the influence of London resources on the imprint the Games makes on London. Such data should only be used to provide a context to more specific data that explicitly links outcomes to Games-related mechanisms or investments. In this respect, the full evaluation of the Mayor's Sport Legacy Fund will, when it becomes available, provide important information on how London resources have influenced sport and physical activity participation, particularly among the less active. In addition, the annual evaluation reporting cycle for the Sportivate programme, which will include London specific data, will continue until 2015. Finally, a transport investment evaluation is expected from Transport for London in Summer 2013, and this will provide further details on the actual and potential longer-term impact of London's Games-related transport investments.

The data that will become available in the future should, of course, be received within the context of an understanding of what the continuing imprint of the Games on London life might reasonably be expected to be. Perhaps the foremost expectations for a continuing imprint relate to the work of the Single Regeneration Framework, and progress towards the socio-economic convergence of the Olympic Host Boroughs, which post-Games are now referred to as London's Growth Boroughs, with London as a whole. The continuing imprint within the Growth Boroughs will be on community, health, education and work, and still has the potential to markedly improve the lives of Growth Borough residents over the next 15-20 years.

The physical imprint of the Games is also continuing to develop. Not least the development of Queen Elizabeth Olympic Park as recreational resource for Londoners, which will begin to re-open later in 2013 and fully re-open in 2014. Other continuing physical imprints will derive from the work of the London Legacy Development Corporation to convert the Olympic Village into long-term housing, and the development of transport infrastructure to serve Queen Elizabeth Park and

the surrounding areas. These physical imprints on London places will also make a secondary imprint on the people of London, with initial data outlined in section 2 already showing behavior changes relating to physical activity and more active transport facilitated by investments in walking and cycling routes, whilst data in section 1 showed that improvements in accessibility have improved the visitor journey for disabled visitors which also, of course, benefits disabled Londoners. Section 1 also showed that physical improvements in housing are likely to have secondary impacts on health and crime indicators, which will continue to improve the lives of Londoners in the Growth Boroughs.

The scale and scope of other aspects of the still developing Games imprint will be largely determined by the extent to which there is a continued investment of London resources and, perhaps, investment from national government, in terms of both finance and political will, in seeking to capitalise on the potential policy legacies outlined in section 3. There are clear potential benefits for sustainability across London that can be realised with a continuing investment of resources in initiatives to develop a Food Vision for Everyday Life and to continue the positive procurement policies for sustainable construction developed through the CompeteFor portal, supplemented by the bringing together of a community of practice to develop and advocate the business case for sustainable construction. A further role for London stakeholders is in encouraging and ensuring the take up for future major events in London of the standards and methodologies for sustainable delivery and carbon footprinting developed through the Games preparations. Finally, an investment in the development of a strategic assurance function for future London projects, public service development and policy decisions has the potential to considerably enhance the quality of future decision making for Londoners. All of these potential investments will have secondary impacts in terms of developing London as a more sustainable and inclusive place and, ultimately, in improving the quality of life of Londoners.

Two of the key policy learning lessons highlighted as critical success factors in the delivery of Games-related initiatives in section 3 were political will and high expectation. One of the possible risks as the 2012 Olympic and Paralympic Games fade in the memory is that political will and expectation for some of the longer-term investments, particularly those within the Single Regeneration Framework for the Growth Boroughs which are set to continue until 2030, will also fade. There is therefore a key role for both the evaluations yet to come that will run up to 2020, and for a potential strategic assurance function for London, in continuing to monitor Games activities and investments that will no longer have the stimulus of a successful Games fresh in the collective memory of Londoners. What was true before the Games remains true in the post-Games period: London cannot passively expect a continuing positive imprint from the Olympic and Paralympic Games. Continued investment of London resources will be the critical success factor in ensuring that such a positive imprint continues to be made.

## ANNEX I: DEVELOPMENT OF BESPOKE MEASURES

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This annex provides brief details on the process by which bespoke measures were developed for the supra-evaluation. It does not include details of simple calculations, such as the updating of some models to reflect current prices, the calculation of per annum data, or the grossing up of survey responses to provide numbers of Londoners.

- **Estimated macro-economic contribution of London resources to the £9.3bn public sector Games-funding package.**

Data from the census<sup>173</sup>, from ONS population estimates<sup>174</sup> and from a survey of the UK tax system<sup>175</sup> were used to calculate: (a) the proportion of general taxation derived from London sources; (b) the proportion of Lottery income derived from those playing the Lottery in London. These estimates were used to estimate the macro-economic contribution of London resources to the parts of the funding package provided from the Exchequer and the National Lottery respectively. These estimates were then added to the direct contributions to the funding package from London council tax and the Greater London Authority<sup>176 177</sup> to arrive at an estimate that 21% of the public sector Games funding package represented a macro-economic contribution from London resources.

- **Accelerated socio-economic development in the Host Boroughs**

Data provided in the Single Regeneration Framework Annual Report for 2011/12<sup>178</sup>, which provided data up to the start of 2012 on changes against 20 indicators for London as a whole compared to the average for the Six Host Boroughs, was used to calculate accelerated development. Changes in the Host Borough data were compared against a counter-factual scenario for each indicator in which the Six Host Boroughs were assumed to have changed from their 2008/9 baseline according to the London average. The trend was projected beyond the start of 2012, and the additional time estimated for the counterfactual scenario to reach the actual Six Host Borough average indicator for the start of 2012 was taken to be the period of accelerated development for the Six Host Boroughs for that indicator. Average accelerated development periods were then calculated for groups of indicators for community, health, education and work, as well as the overall average of 9 months accelerated development across all 20 indicators.

- **Accelerated development of the Olympic Park site**

While it is all but impossible to develop a quantified counterfactual model for a non-Games scenario for the development of the Olympic Park site, there is evidence that shows that some regenerative investment was *planned* to take place had the Games not been awarded to London in 2005. Prior to the award of the Games the London Development Agency invested £125million in 86 hectares of land on the basis that it would still be used for other regeneration purposes if the Games had not been awarded to London<sup>179</sup>. Similarly, preliminary plans for the Westfield Stratford development were explored prior to the formal launch of London's bid for the Games<sup>180</sup>. However, given evidence that the Games protected regenerative investment in and around the

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<sup>173</sup> ONS (2012) 2011 Census – Population and Household Estimates;

<sup>174</sup> ONS (2012) Population Data Tables <http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Population#tab-data-tables> (accessed 26/7/2012);

<sup>175</sup> Institute for Fiscal Studies (2011) A Survey of UK Tax System

<sup>176</sup> National Audit Office (2007) The budget for the London 2012 Olympic and Paralympic Games;

<sup>177</sup> National Audit Office (2011) Preparations for the London 2012 Olympic and Paralympic Games Progress Report

<sup>178</sup> Strategic Regeneration Framework (2012) Convergence Framework Annual Report 2011-12.

<sup>179</sup> PWC/SQW (2011) London Development Agency: 2012 Games Legacy Impact Evaluation Study Report.

<sup>180</sup> Volterra (2011) Westfield Stratford: The Inheritance before the Games.

Olympic Park site from the spending cuts that resulted from the economic downturn<sup>181 182 183</sup>, it seems highly unlikely that the alternative public sector regenerative investments planned for a potential non-Games scenario before 2005 would have actually been realized given the severely changed economic circumstances in the latter part of the decade. Consequently, despite the existence of alternative investment plans prior to 2005 for a non-Games scenario, the assumed counterfactual for the Olympic Park site is that there would have been no regenerative investment in the absence of the Games. This means that, unlike the other areas of accelerated development outlined in this appendix, for which counterfactual scenarios are dynamic, the assumption for the development of the Olympic Park site is that the counterfactual scenario is a static baseline in which there would have been no development of the site if the Games had not been awarded to London in 2005. Given that the full re-opening of the park in Spring 2014<sup>184</sup> will mark ten years since the planning application for Olympic Park was submitted in May 2004<sup>185</sup>, an initial estimate of ten years accelerated development against the static counterfactual baseline appears reasonable. However, as a result of the immovable deadline provided by the Games, the Olympic Park site is likely to have developed not only farther, but also faster, as a result of the Games<sup>186</sup>, and as such the estimate is likely to be a conservative one that is better characterised as *at least* ten years accelerated development. While at various points in time prior to the Games other analysts quoted in the press have speculated that accelerated development might have been five<sup>187</sup> or even seven<sup>188</sup> times greater than this estimate, such comments appear to have also encompassed the wider regenerative impacts on East London which, as section 1.2 showed, are set to continue to 2030. In this report, the estimate of at least ten years accelerated development is for the Olympic Park site alone to 2014, with a separate time-bound estimate for the first three years of the Single Regeneration Framework being provided for the wider East London area as part of the analysis of the socio-economic development of the Host Boroughs.

- ***Accelerated development for London's transport infrastructure***

Multiple sources note that £6.5bn was spent on transport infrastructure to support the Games<sup>189 190</sup>, with the Commission for a Sustainable London 2012 estimating that £5bn of this was brought forward investment<sup>191</sup>. Data from Transport for London's annual investment plans from 2009 to 2018<sup>192</sup> were used to model a counterfactual scenario in which £5bn of transport investment was shifted from the five years before the Games to the ten years following the Games. This smoothed out Transport for London's infrastructure investments across this period, whereas actual investment peaked for the Games. The additional time estimated for the counterfactual scenario to reach the cumulative level of investment up to and including 2012/13 was just over 13 months, and so this was taken to be the period of accelerated development for London's transport infrastructure.

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<sup>181</sup> PWC/SQW (2011) London Development Agency: 2012 Games Legacy Impact Evaluation Study Report

<sup>182</sup> Volterra (2011) Westfield Stratford: The Inheritance before the Games.

<sup>183</sup> Royal Institute of Chartered Surveyors (2011) The 2012 Games: The regeneration legacy

<sup>184</sup> London Legacy Development Corporation (2012) Get Ready for the Future: Queen Elizabeth Olympic Park.

<sup>185</sup> PWC/SQW (2011) London Development Agency: 2012 Games Legacy Impact Evaluation Study Report.

<sup>186</sup> DCMS (2013) Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games – Report 5: Post-Games Initial Evaluation (East London Evidence Base).

<sup>187</sup> Tony Travers, cited in The Economist (2011) The 2012 Olympics: Capital Values (21/7/2011)

<sup>188</sup> Tony Travers, cited in The Globe and Mail (2012) The reality behind London's Olympic Dreams (29/7/2012)

<sup>189</sup> ODA (2012) Delivering Transport for the London 2012 Games

<sup>190</sup> GLA (2012) Leaving a Transport Legacy

<sup>191</sup> Commission for a Sustainable London 2012 (2012) Breaking the tape – Pre-Games review

<sup>192</sup> TfL (2009) Investment programme 2009/10 to 2017/18.

- ***Accelerated growth of London's tourism income***

The estimates for additional tourism spending provided by Weed and Shipway's meta-analysis<sup>193</sup> of the Blake<sup>194</sup>, Oxford Economics<sup>195</sup> and Lloyds Banking Group<sup>196</sup> models were distributed across the five years before and the five years after the Games according to the calculations outlined by Weed & Shipway. This additional growth was then subtracted from World Bank data<sup>197</sup> on actual and projected tourism receipts to develop a counter-factual scenario. The trends for both actual and projected receipts (the Games case) and for estimated actual and projected receipts for the counterfactual scenario (the non-Games case) were then smoothed based on three year averages. The additional time estimated for the counterfactual scenario to reach the projected growth of the Games-case in 2017 was approximately two years, and this was taken to be the period of accelerated growth in London's tourism income.

- ***The development of the Londoner Groups***

The final wave of London tracking data (March 2013)<sup>198</sup> was used to delimit the groups. This is because this was the point at which respondents had the most information to comment on the impact of the Games for them personally, and for their area, to date, currently, and potentially in the future. The groups were delimited on the ratings they gave to questions about past, current and future impacts, and to questions about the extent to which they had changed aspects of their behavior or had felt a positive cultural, sporting or community participation effect as a result of the Games. Allocation to the highly engaged and personally impacted group was on the basis of at least one positive response about impacts and at least one positive response about behavior change or positive effects. The low engagement and no personal impact group and the negative group (group 4 in the table) comprised those who said they had experienced no behavior change or positive effects, with the negative group being further delimited by responding that there would be no positive benefits for London. The remaining respondents were allocated to the medium engaged and personally impacted group.

Responses to all questions were then calculated for all Londoner Groups, and were linked with individual respondents answers to the post wave of London tracking data (October 2012)<sup>199</sup>, which included additional questions not asked in the March 2013 wave on engagement. This provided a repeated measures sample size of 703 across the October 2012 sample of 1,032 and the March 2013 sample of 1,002. It was at this stage that the groups were named. Where possible, answers were then checked with other surveys. The highly engaged and personally impacted group were most likely to live in the Host Boroughs, gave very similar answers for the impact of the Games on their local area as respondents to the DCMS Host Borough Residents Survey<sup>200</sup>. While trends in sport and arts participation shown across the October 2012 and March 2013 waves were broadly in line with Londoners responses to the Taking Part<sup>201</sup> and Active People<sup>202</sup> surveys. Responses for supporting the Games in the Taking Part survey were also close to those who thought the Games would bring benefits in the London tracking data, and this was also matched by responses to similar questions in the ICM Summer events research<sup>203</sup>. The data underpinning the Londoner Groups is shown in the table below:

<sup>193</sup> Weed M. & Shipway S. (2013 in press) Progress in Olympic Tourism Research: A Meta-Analysis of Olympic Tourism Flows and an Exploration of Leveraging Strategies

<sup>194</sup> Blake, Adam (2005) The Economic Impact of the London 2012 Olympics

<sup>195</sup> Oxford Economics (2007) The value of the London 2012 Olympic and Paralympic Games to UK tourism.

<sup>196</sup> Lloyds Banking Group (2012) The Economic Impact of the London 2012 Olympic and Paralympic Games

<sup>197</sup> World Bank (2013) International Tourism Receipts <http://data.worldbank.org/indicator/ST.INT.RCPT.CD> (accessed 3/5/2013)

<sup>198</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

<sup>199</sup> GLA Intelligence, London 2012 Monitoring, July 2011 - March 2013.

<sup>200</sup> DCMS (2012) Olympic and Paralympic Host Borough Survey Statistical Release.

<sup>201</sup> Taking Part statistical releases <https://www.gov.uk/government/organisations/department-for-culture-media-sport/series/sat--2> (accessed 10/5/2013)

<sup>202</sup> Sport England Active People Survey [http://www.sportengland.org/research/active\\_people\\_survey.aspx](http://www.sportengland.org/research/active_people_survey.aspx) (accessed 10/5/2013)

<sup>203</sup> ICM (2012) GLA Olympic and Paralympic Games Events Research.



	HIGHLY ENGAGED & PERSONALLY IMPACTED	MEDIUM ENGAGED & PERSONALLY IMPACTED	LOW ENGAGED, NO PERSONAL IMPACT	NEGATIVE
<b>Percentage of Londoners</b>	<b>45%</b>	<b>32%</b>	<b>19%</b>	<b>4%</b>
<b>BENEFITS AND EFFECTS FOR ME</b>				
<b>Changed at least one behaviour or felt at least one positive effect in relation to culture, sport or volunteering as a result of the Games</b>	<b>100%</b>	<b>57%</b>	<b>0%</b>	<b>0%</b>
<b>Changed at least one behaviour</b>	<b>76%</b>	<b>32%</b>	<b>0%</b>	<b>0%</b>
Use public transport more	51%	13%	0%	0%
Cycle more	44%	12%	0%	0%
Walk more	61%	23%	0%	0%
Eat more healthily	57%	18%	0%	0%
More involved with community	48%	10%	0%	0%
<b>At least one positive effect in relation to culture, sport or volunteering</b>	<b>91%</b>	<b>48%</b>	<b>0%</b>	<b>0%</b>
Positive effect on cultural knowledge or participation	71%	23%	0%	0%
Positive effect on volunteering knowledge or participation	69%	27%	0%	0%
Positive effect on sporting knowledge or participation	71%	25%	0%	0%
<b>There will definitely be no benefits to me or my area now or in the future</b>	<b>0%</b>	<b>30%</b>	<b>71%</b>	<b>100%</b>
<b>IMPACTS IN GENERAL</b>				
<b>Hosting the Games has/will benefit London in some way</b>	<b>96%</b>	<b>85%</b>	<b>88%</b>	<b>0%</b>
Promoting London around the world	72%	66%	68%	0%
Regenerating East London	64%	60%	61%	0%
More jobs for Londoners	48%	34%	25%	0%
More opportunities to play sport	50%	35%	27%	0%
More cultural events and opportunities	45%	28%	16%	0%
<b>ENGAGEMENT</b>				
Think Summer of 2012 was a fantastic experience in London	85%	64%	52%	4%
Knew at least a fair amount about Mayoral and others initiatives	64%	23%	21%	3%
Engaged with at least one of the Mayoral and others initiatives	74%	35%	19%	7%
Participated in cultural and events offer	62%	23%	11%	1%
Mayor offered me more ways to get involved in sport	46%	19%	12%	6%
<b>PROFILES</b>				
Average age	37	43	50	47
Live in Host Borough	23%	15%	12%	10%
Working	68%	63%	55%	63%
Unemployed	5%	7.5%	11%	7.5%
Male / Female	54% / 46%	41% / 59%	46% / 54%	45% / 55%
Parents of children living at home	36%	22%	19%	30%
Live alone	10%	17%	17%	18%
Manual worker	25%	22%	20%	28%
Managerial/Professional/clerical	64%	63%	63%	63%

- **Analysis of sustainability and of diversity and inclusion in twenty key Games-related projects and initiatives markedly or moderately influenced by London resources**

Evaluations and/or plans for the twenty projects and initiatives listed in the table below were independently scrutinized by two members of the supra-evaluation team, and the extent to which sustainability and diversity and inclusion were embedded, acknowledged or not considered was

assessed. Concerns were assessed as embedded if there was evidence that the programme had sought to actively promote sustainability / diversity and inclusion, whereas it they were assessed as acknowledged if there was evidence only that the programme acknowledged that sustainability / diversity and inclusion should be considered in implementation. If there was no evidence of such concerns being considered, the programme was assessed to not have considered sustainability / diversity and inclusion.

	SUSTAINABILITY			DIVERSITY & INCLUSION		
	Embedded	Acknowledged	Not Considered	Embedded	Acknowledged	Not Considered
Mayor's Sport Legacy Fund	*			*		
Showtime & Secrets	*			*		
BT London Live			*		*	
Team London Ambassadors	*				*	
Active Travel Programme	*				*	
TfL Transport legacy plan	*			*		
Big Dance		*		*		
Sportivate	*				*	
GLA City Operations		*		*		
London Employment and Skills Taskforce	*			*		
Personal Best	*			*		
Westfield Stratford		*		*		
ODA construction programme	*			*		
CompeteFor	*			*		
LLDC Legacy programme	*			*		
Single Regeneration Framework	*			*		
London Food Vision	*			*		
LOCOG sustainability programme	*			*		
Commission for a Sustainable London 2012	*			*		
Tourism	*			*		
<b>TOTALS</b>	<b>16</b> <b>(80%)</b>	<b>3</b> <b>(15%)</b>	<b>1</b> <b>(0%)</b>	<b>16</b> <b>(80%)</b>	<b>4</b> <b>(20%)</b>	<b>0</b> <b>(0%)</b>

## ANNEX II: SOURCES OF EVIDENCE

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### A) PROGRAMME EVALUATIONS AND REPORTS CITED AND CONSULTED

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