

# **London 2012 Monitoring**

Online survey of Londoners

During Games - August 2012



# GLA INTELLIGENCE UNIT

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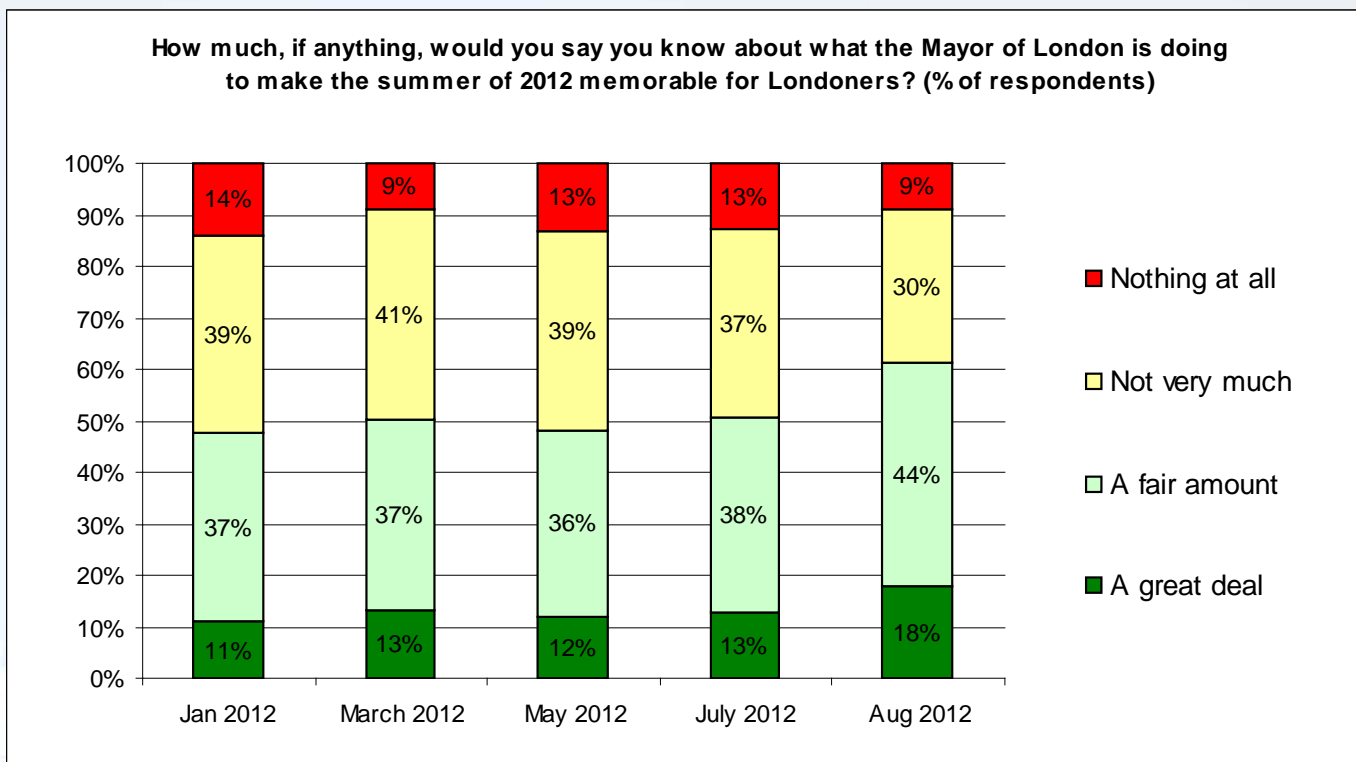
# Background

- The aim of the Olympic Monitoring Research is to evaluate the impact on London and Londoners of the work being delivered by the following teams within the GLA:
  - Culture
  - Marketing and Events
  - City Ops
  - Legacy Team
- The Olympic Monitoring Research is made up of 3 key aspects:
  1. Online surveys with a representative sample of Londoners conducted by TNS London Bus. Four waves of research, one pre, one during and two following the Games, each with approx 1000 respondents.
  2. Face to Face interviews with approx 3600 people attending events conducted by ICM Research. Approx nine events during Games time with 400 interviews at each
  3. Evaluation of the Showtime and Secrets programme including an audience survey of 2500 people across approx 50 different events
- This presentation outlines the key findings from the second wave (during Games) of online research conducted by TNS from 16<sup>th</sup> to 22<sup>nd</sup> August 2012. A representative sample of 1002 Londoners over the age of 16 in the Greater London area completed the survey.
- Results are weighted by gender, age, social grade and working status to ensure data is representative. Where results do not sum 100%, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stated.

## Aim 1: To assess awareness of Mayors contribution

# 91% of Londoners know something about what the Mayor of London is doing to make the summer of 2012 memorable for Londoners, this is an increase of 4% since May 2012.

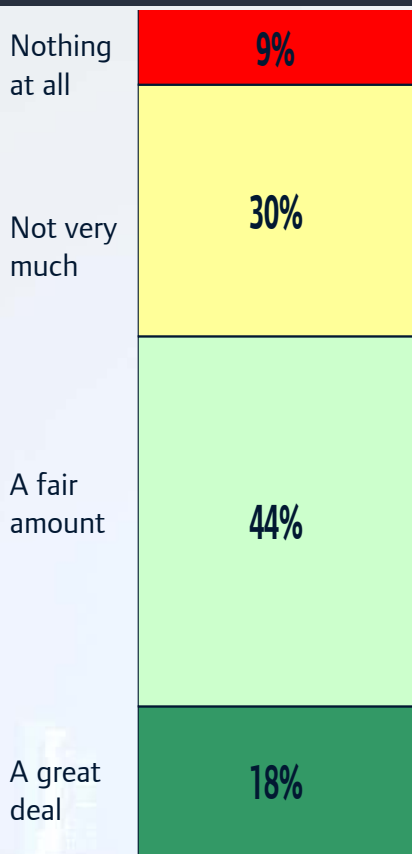
- The level of Mayoral awareness has gone up during Games time having previously been fairly consistent. Those that know at least a fair amount has risen by 11% to 62% and those that know something is now at 91%.



GLA/TNS – Free Sport 12th - 16th Jan 2012, 1045 Londoners 16+ yrs  
GLA/TNS – Free Sport 15th - 20th March 2012, 1031 Londoners 16+ yrs  
GLA/TNS – Pre Olympic 10th - 15th May 2012, 1018 Londoners 16+ yrs  
GLA/TNS - Gigs 12th-17th July 2012, 1012 Londoners 16+ yrs,  
GLA/TNS – During Olympic 16th – 22nd Aug 2012, 1002 Londoners 16+ yrs

## Aim 1: To assess awareness of Mayors contribution

**As in May males, those aged 25-34, those with children at home and those working are more likely to know at least a fair amount.**



More likely to know at least a fair amount:

- Men
- 25-34 year olds
- Parents with children in the household
- those who are working
- Higher socio-economic groups (ABC1)
- Those have heard of the SLNO campaign, heard of the website or seen the adverts and decorations

More likely to know not very much:

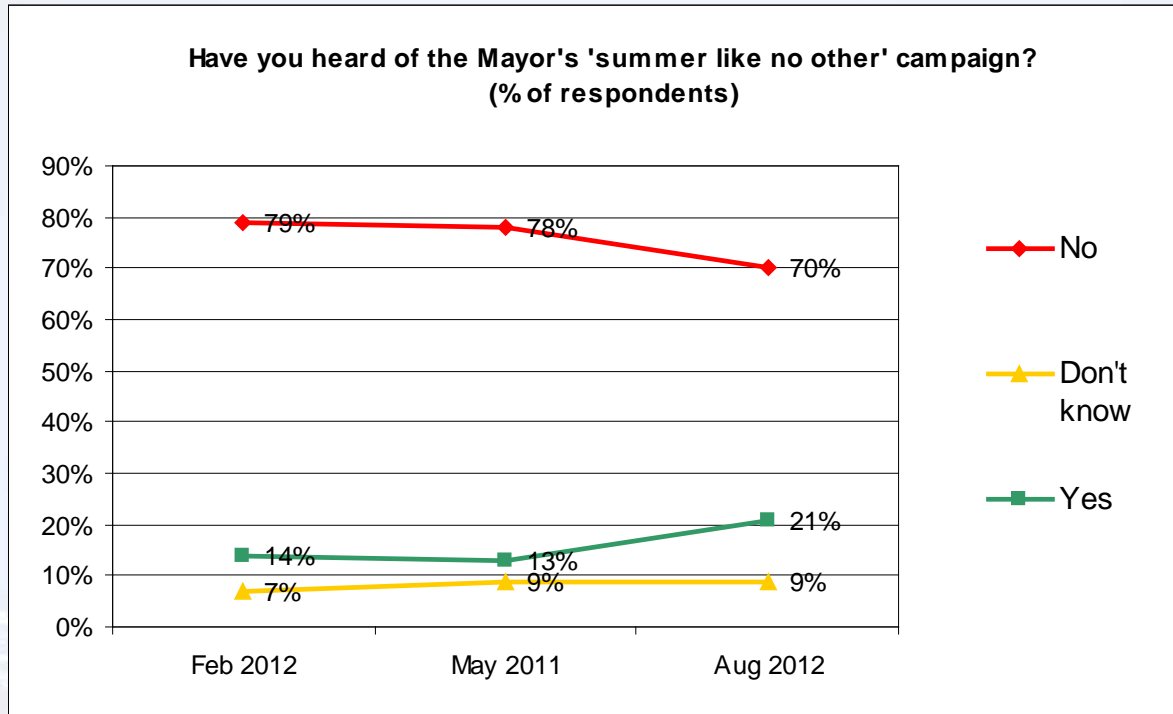
- Women
- Those over 65 years old
- Parents without children in the household
- those who are not working
- Lower socio economic groups (C2DE)
- Those who have not heard of the SLNO campaign, not heard of the website, not seen the adverts or decorations

**How much, if anything, would you say you know about what the Mayor of London is doing to make the summer of 2012 memorable for Londoners (% of respondents)**

### Aim 3: To assess awareness of marketing campaigns

## 21% of Londoners have heard of the Mayor's Summer Like No Other campaign. This is an increase of 8% since before the Games started

- 21% is a high level of awareness in comparison to previous campaigns throughout 2011/12 where the level of campaign awareness has been 12% on average.



More likely not to have heard of the campaign:

- Women
- 55 + year olds
- Those without children at home
- Those not working

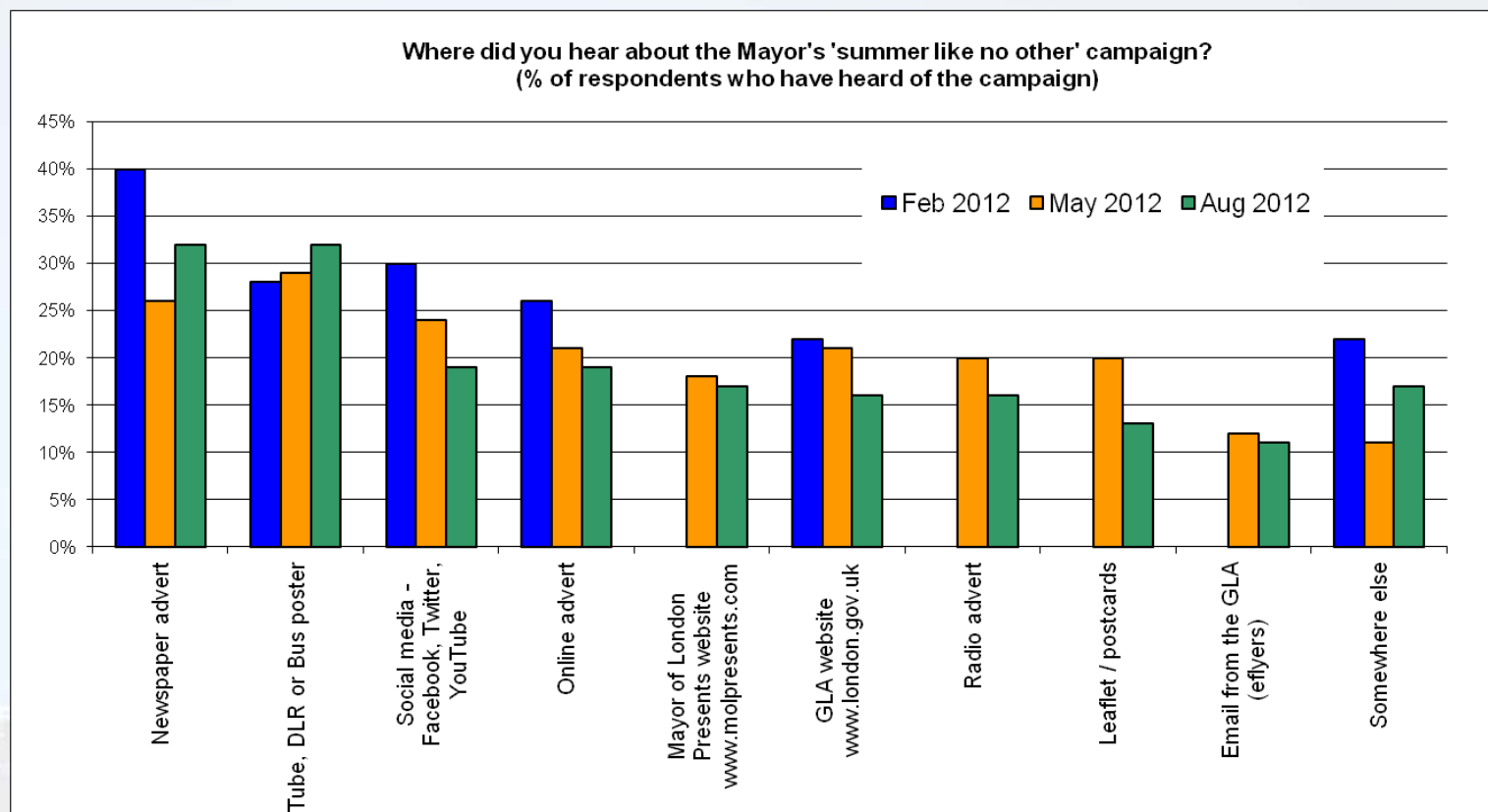
More likely to have heard of the campaign:

- Men
- 35-44 yrs olds
- Those with children in the household
- Those working
- Higher socio-economic groups (ABC1)

### Aim 3: To assess awareness of marketing campaigns

## Newspaper adverts, posters, social media and online adverts remain the most popular places for hearing about the campaign

- Of those that had heard of the campaign (206 respondents) 32% heard about it via newspapers and the same amount through Tube, DLR or Bus posters. Note that this is based on a small sample size of 206 respondents and therefore results should be treated with caution.



GLA/TNS – SLNO 9<sup>th</sup>–13<sup>th</sup> Feb 2012, 1007 Londoners 16+ yrs

GLA/TNS – Pre Olympic 10<sup>th</sup> - 15<sup>th</sup> May 2012, 1018 Londoners 16+ yrs

GLA/TNS – During Olympic 16<sup>th</sup> – 22nd Aug 2012, 1002 Londoners 16+ yrs

### Aim 3: To assess awareness of marketing campaigns

On average 13% of Londoners have seen the adverts, this equates to 832,052 people\*

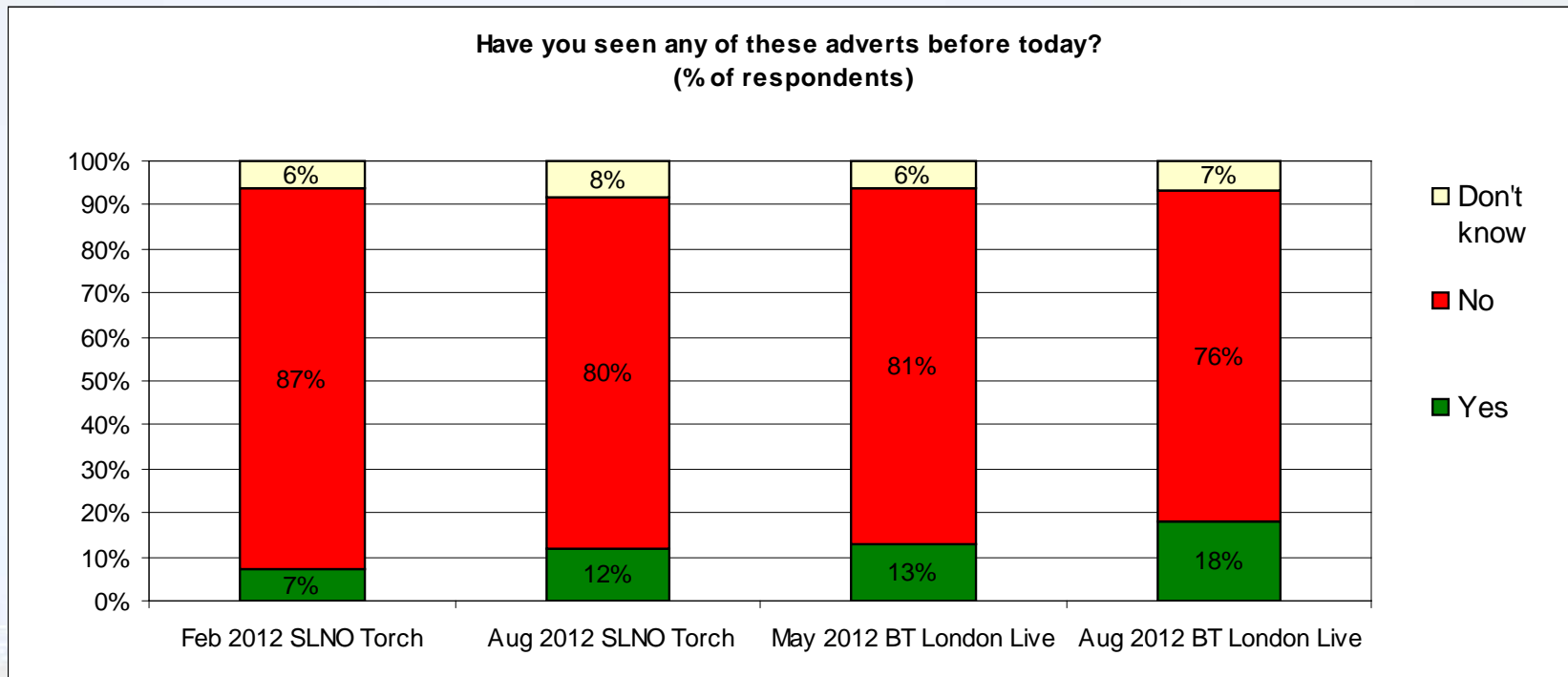
Have you seen any of these adverts before today?	BT London Live	Secrets	Showtime	A summer like no other	Stroll
Yes	18%	10%	10%	12%	14%
No	76%	83%	83%	80%	79%
Don't know	67%	7%	7%	8%	7%

\* This is based on the 16+ population of London in 2012 (6,400,400) and assumes everyone has an equal chance of seeing the adverts

### Aim 3: To assess awareness of marketing campaigns

**For the SLNO advert and the BT London Live advert the number of Londoners to see them has increased by 5% since earlier in the year**

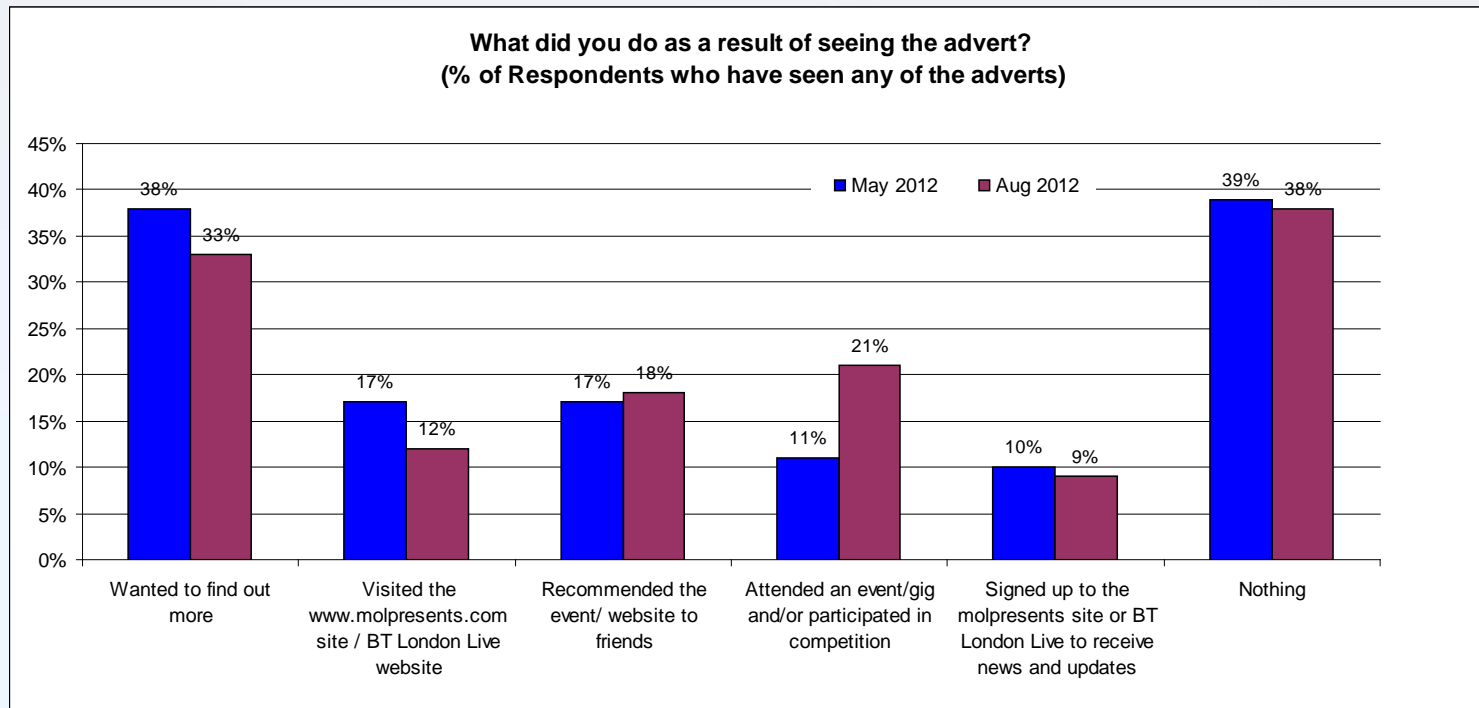
- In Feb 7% of Londoners had seen the SLNO Torch advert in August this had risen to 12%. For the BT London live adverts 13% had seen them in May 2012 and this has risen to 18% in August 2012.
- 18% is the highest recognition of any of the 2011/2012 campaign adverts.



#### Aim 4: To evaluate the impact of marketing and comms

**Of those that had seen any of the adverts (286 respondents)  
33% wanted to find out more while 38% did nothing**

- There has been an increase in those who attended events as a result of seeing the advert from 11% to 21%.



- Similarly to in May those who wanted to find out more are more likely to be younger, parents with children at home, and those in lower socio-economic groups (C2DE). In August women are also more likely to want to find out more. Note that this is based on a small sample size of 94 respondents who wanted to find out more and therefore results should be treated with caution.

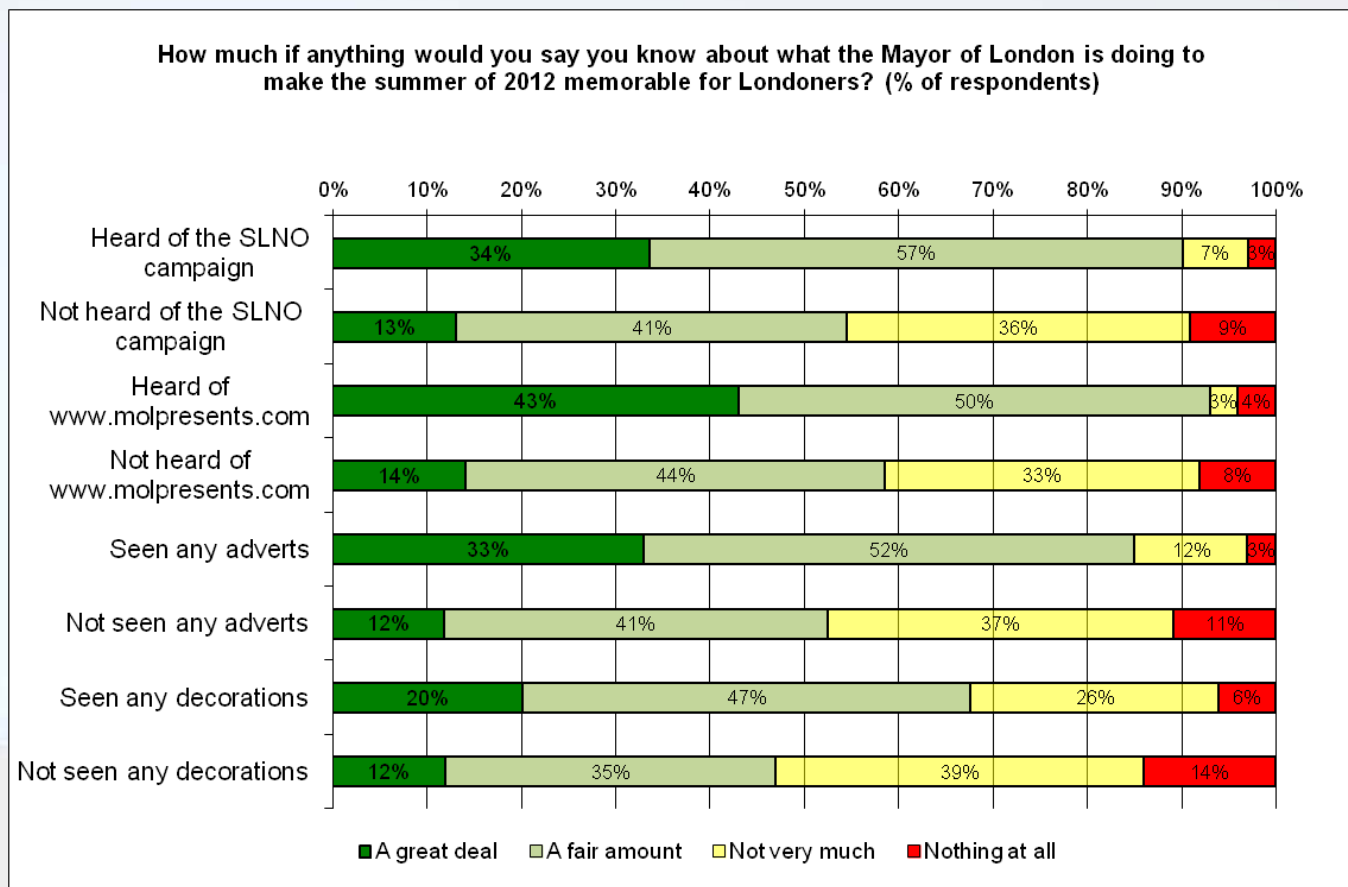
## Aim 4: To evaluate the impact of marketing and comms

# As in May there appears to be a correlation between knowledge of the marketing campaigns and awareness of the Mayor's contribution

■ Those who have heard of the summer like no other campaign, have heard of the molpresents.com website and those that have seen any of the adverts or any of the decorations are more likely to know a great deal/ a fair amount about what the Mayor of London is doing than those who haven't.

■ This chart illustrates this correlation

■ Please note the small sample sizes for those who have heard of the campaign (209), website (107), or seen any adverts (286) so results should be treated with caution



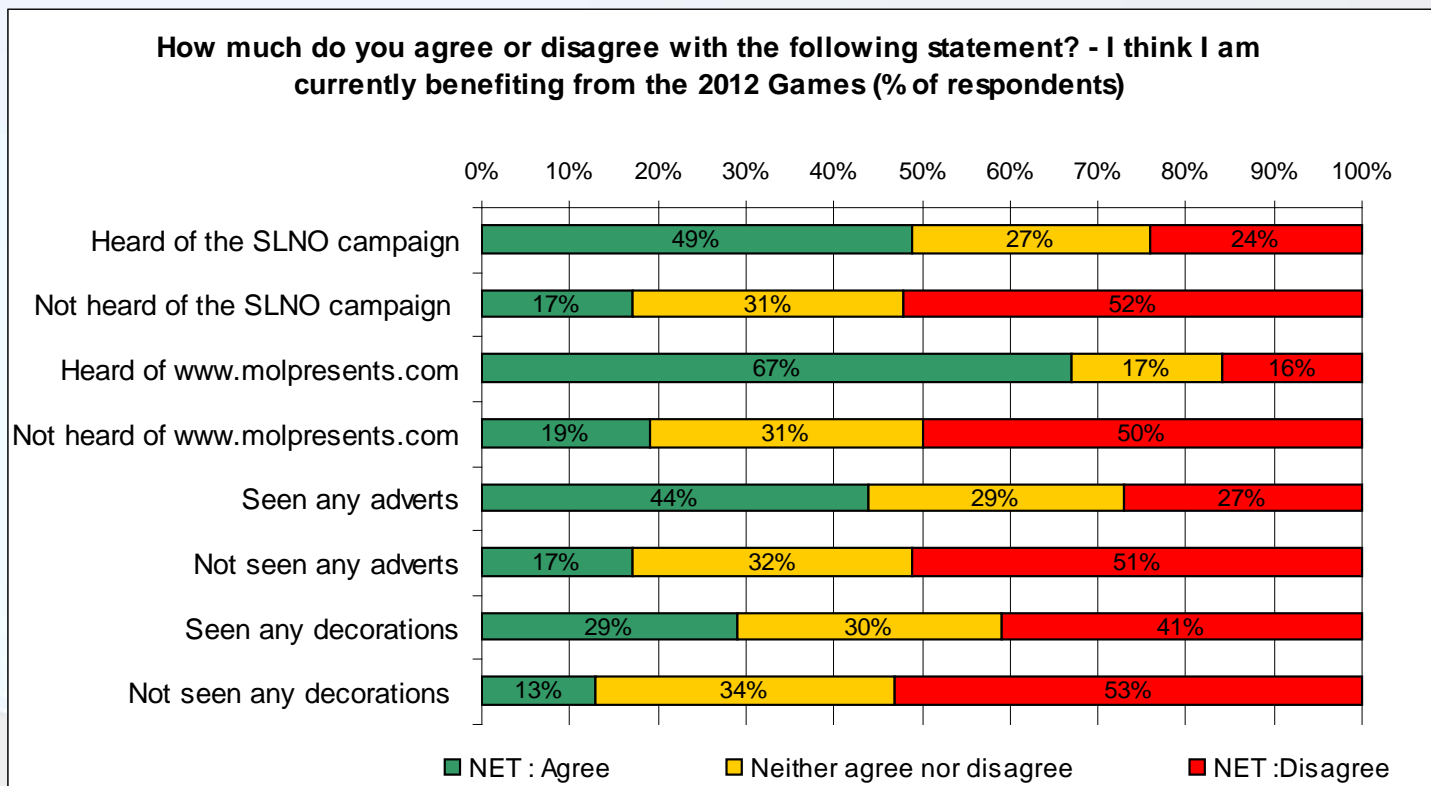
#### Aim 4: To evaluate the impact of marketing and comms

## There also appears to be a correlation between knowledge of the marketing campaigns and perception of the benefits of the Games

- Those who have heard of the summer like no other campaign, have heard of the molpresents.com website and those that have seen any of the adverts or decorations are more likely to agree that they or their local area is currently benefitting or will do in the future.

This chart illustrates this correlation for those that agree or disagree that they are currently personally benefitting from the Games

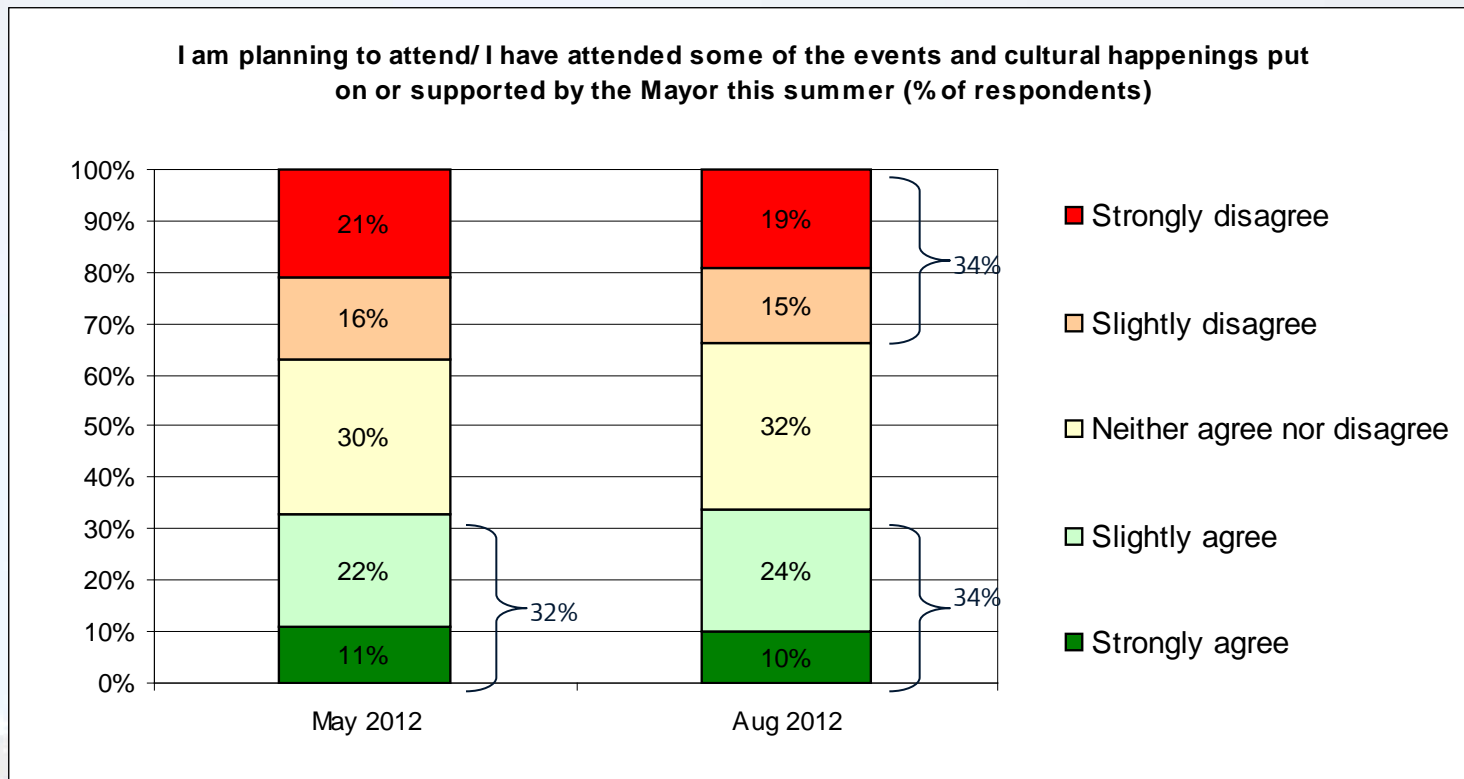
Please note the small sample sizes for those who have heard of the campaign (206), website (106) or seen any adverts (286) so results should be treated with caution



**Aim 7 : To assess the impact of programmes on future events**

**Over a third of Londoners (34%) have attended or plan to attend some of the events this summer. This is a 2% increase since May 2012.**

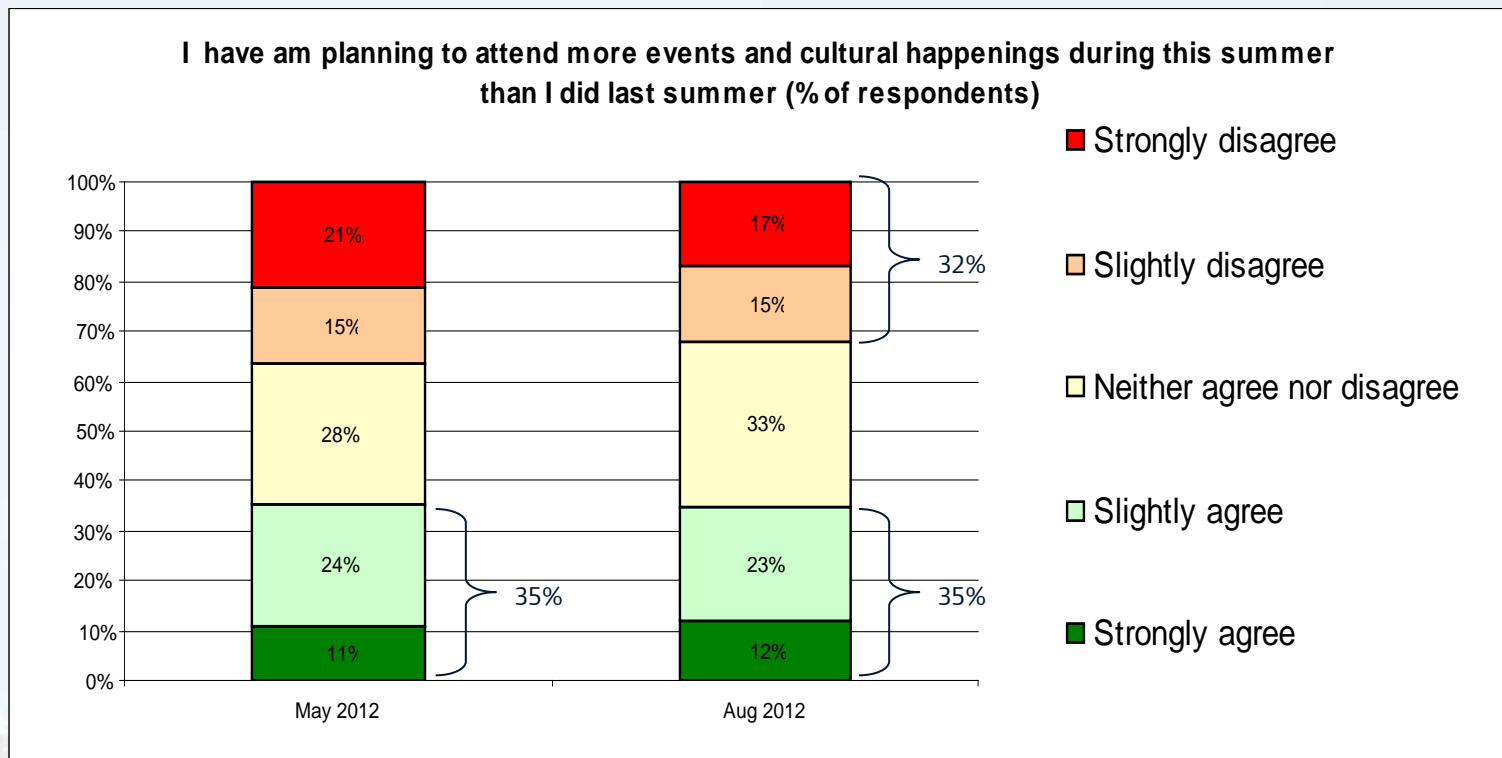
■ Although 34% have attended or plan to attend events the same amount are not likely to attend any events.



## Aim 7 : To assess the impact of programmes on future events

**There has been little change in the number of Londoners who have or plan to attend more cultural events this summer than they did last summer, remaining at 35%.**

- Although 35% have attended or are planning to attend more events than last summer 32% disagree that they are likely to attend more events this year than last year.



**Aim 7 : To assess the impact of programmes on future events**

**As in May men, younger people, those working, those with children at home and those who are aware of the marketing are more likely to plan to attend events and cultural happenings**

Those more likely to agree that they have attended or are planning to attend some of the events and cultural happenings are:

- Men
- 25-34 year olds
- Parents with children at home
- Those working
- Higher socio-economic groups (ABC1)
- Those who think they and their local area are benefitting from the Games
- Those who have heard of the summer like no other campaign, the website or seen any adverts or decorations

These same groups of people are likely to agree that they have or will attend more events and cultural happenings during this summer than last year.

Those Londoners most likely to disagree that they are planning to attend some of the events and cultural happenings are:

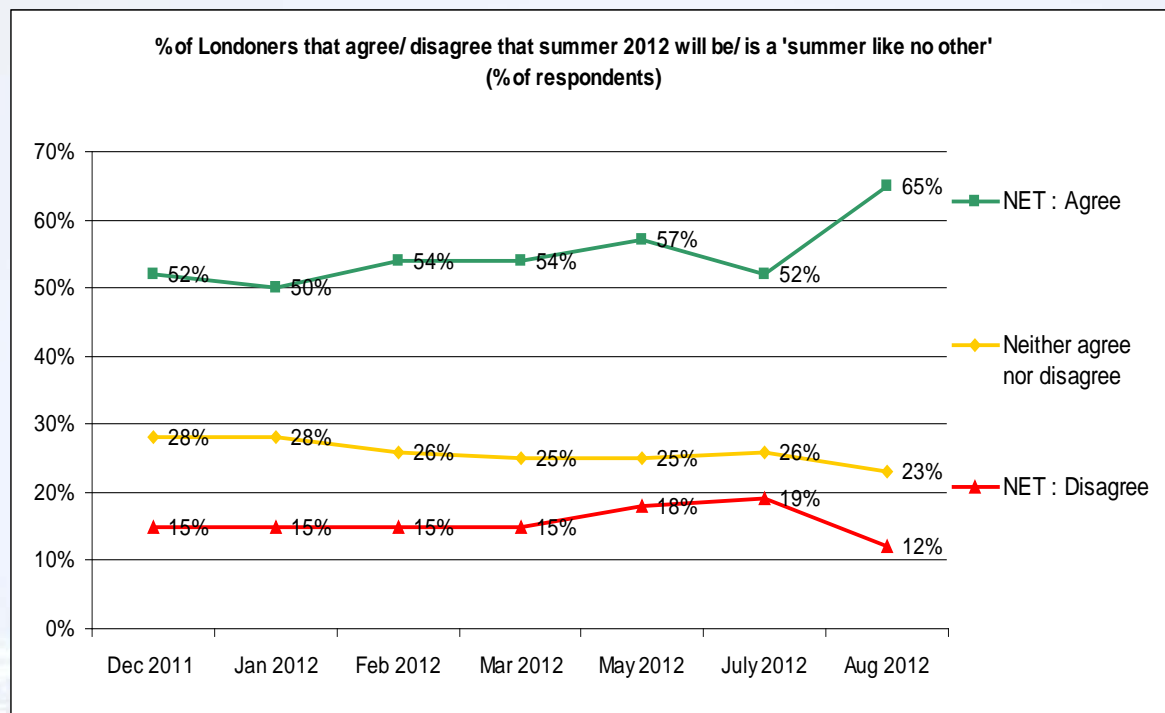
- Woman
- 55+ year olds
- Those without children at home
- Those not working
- Those who do not think that they or their local area is benefitting
- Those who have not heard of the summer like no other campaign, not heard of the website or not seen any of the adverts or decorations

These are the same people who are more likely to disagree they will attend more events and cultural happenings this year than last year.

## Aim 8: To assess the sentiment of Londoners

# 65% of Londoners think that summer 2012 is a 'summer like no other' this is a 13% increase since before the Games began in July

- 65% is the highest level of agreement since December 2011.
- Unlike previously, in August there is no difference between men and women who agree it is a summer like no other.



Those more likely to agree this summer will be a summer like no other are:

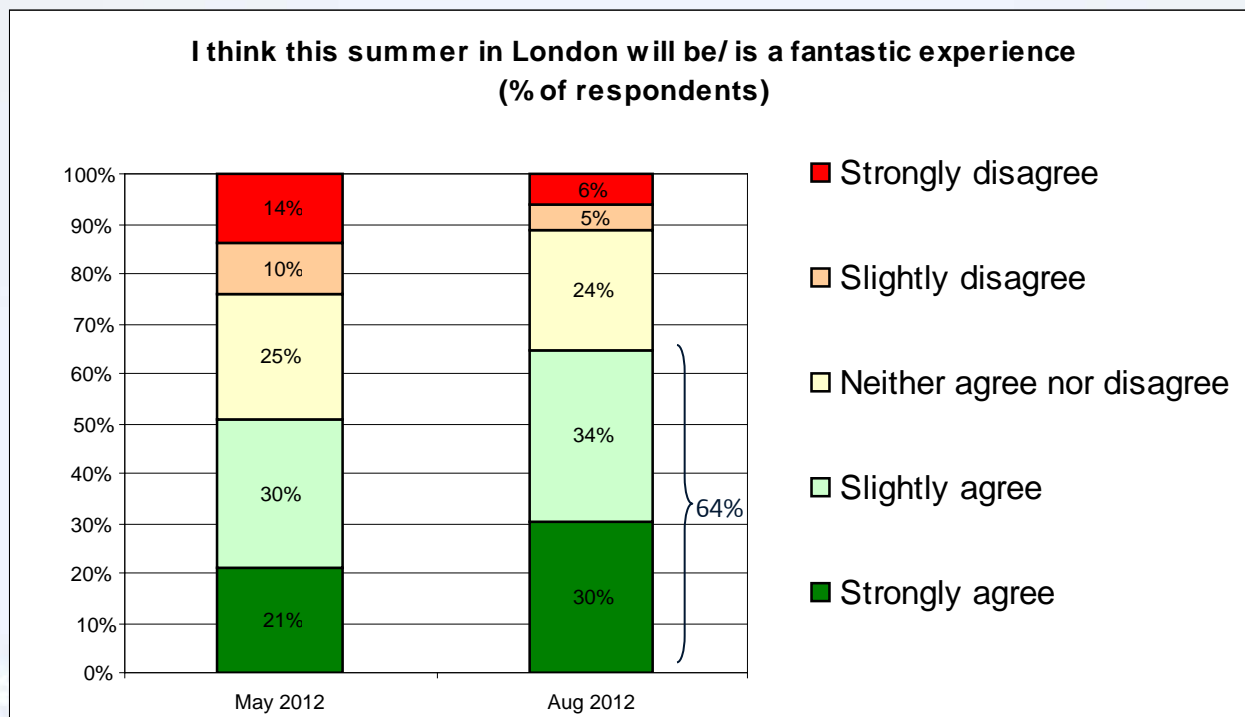
- 25-54 and 64+ yrs olds
- Parents with children at home
- Those working
- Those in higher socio-economic groups (ABC1)
- Those who think they and their local area is benefitting
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts and decorations

TNS/GLA London Bus  
15 - 20 Dec 2011, 1016 London adults 16+ yrs, 12-16 Jan 2012, 1045 London adults 16+ yrs  
9 -13 Feb 2012, 1007 London adults 16+ yrs, 15-20 March 2012, 1031 London adults 16+ yrs  
10 -15 May 2012, 1018 London adults 16+ yrs, 12-17 July 2012, 1012 London adults 16+ yrs,  
16-22nd Aug 2012, 1002 London adults 16+ yrs

## Aim 8: To assess the sentiment of Londoners

# 64% of Londoners think this summer in London is a fantastic experience (an increase of 13% since May)

- Unlike in May there is no difference between men and women who agree this summer is a fantastic experience .



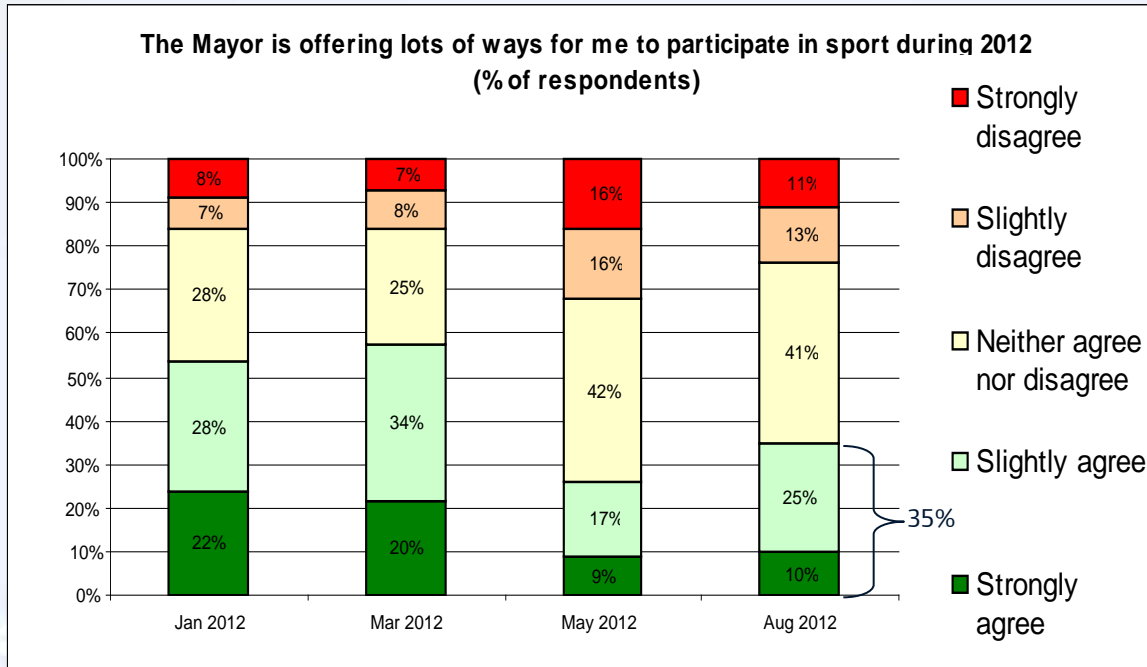
Those more likely to agree this summer is a fantastic experience are:

- 25-54 and 64+ yrs olds
- Parents with children at home
- Those working
- Those in higher socio-economic groups (ABC1)
- Those who think they and their local area is benefitting
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts and decorations

## Aim 8: To assess the sentiment of Londoners

# 35% of Londoners agree that the Mayor is offering lots of ways for them to participate in sports, this is a 9% increase from May

- Following the fall from March to May (from 54% to 26% possibly due to the fact that in January and March the questions was asked as part of the Free Sport Campaign survey and so respondents were probably focusing more on sporting opportunities) there has been a 9% increase and now 35% of Londoners agree the Mayor is offering lots of ways for them to participate in sports



### More likely to agree are:

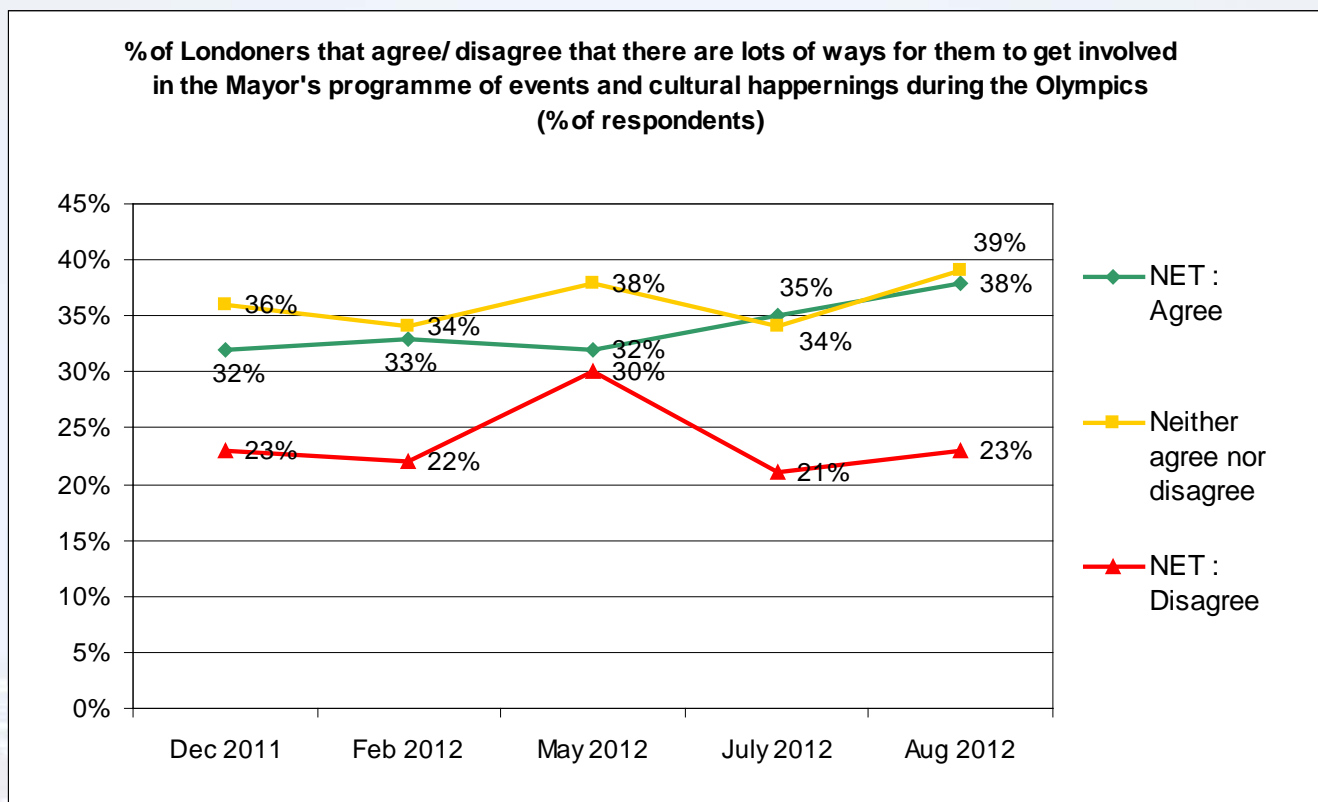
- Men
- 25-44 yr olds
- Those with children in the household
- Those working
- Those from higher socio-economic groups (ABC1)
- Those who think they and their local area is benefitting
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts and decorations

GLA/TNS – Freesport 12th – 16th Jan 2012, 1045 Londoners 16+ yrs  
GLA/TNS – Freesport 15th – 20th March 2012, 1031 Londoners 16+ yrs  
GLA/TNS – Pre Olympic 10th – 15th May 2012, 1018 Londoners 16+ yrs  
GLA/TNS – During Olympic 16th – 22nd Aug 2012, 1002 Londoners 16+ yrs

## Aim 8: To assess the sentiment of Londoners

# Since before the games began in July there has been a 3% increase in the number of Londoners who think that there are lots of ways to get involved in events during the Olympics

- 38% feel that there are lots of ways for them to get involved in the Mayors programme of events and cultural happenings during the Olympics while 23% feel this is not the case.



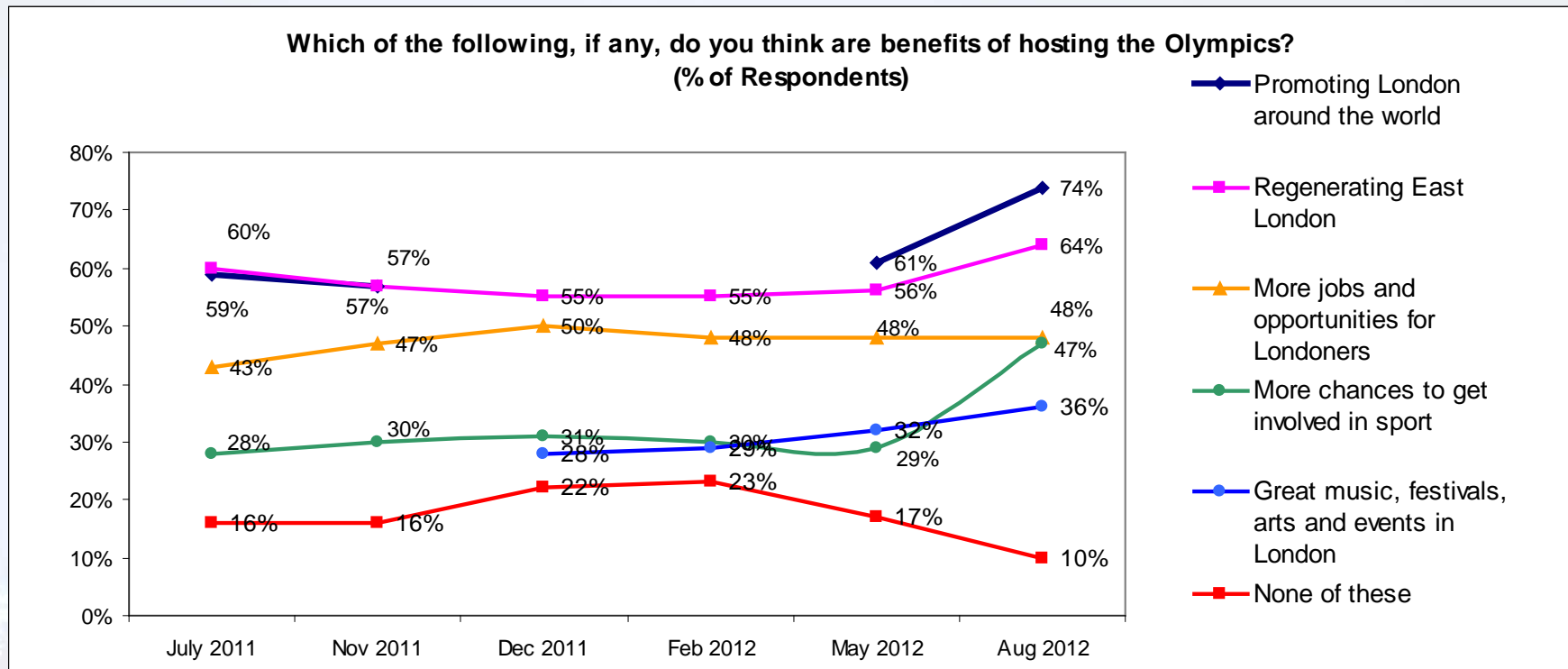
More Likely to agree are:

- 25-34 yr olds
- those with children in the household
- Those working
- Those in higher socio-economic groups
- Those who think they and their local area is benefitting
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts and decorations

## Aim 9 : To track perception of benefits

# Every benefit, with the exception of job opportunities, has increased in recognition since before the Games.

- Promoting London around the world remains the most recognised now at 74% this is followed by Regenerating East London (64%) and more jobs and opportunities for Londoners (48%).
- More chances to get involved in sport previously the least recognised benefit has increased in recognition significantly from 29% to 47%



## Aim 9 : To track perception of benefits

# The following groups of people are more likely to recognise each of these benefits

### **Promotion of London around the world (74%):**

- Females (in May this was men)
- 25+ year olds
- Parents with children at home
- Those in higher social-economic grades (ABC1)

### **More chances to get involved in sport (47%):**

- Females
- 16-54 year olds (wider age range than in May)
- Parents with children at home
- Those working
- Those in higher socio-economic groups (ABC1)

### **Regenerating East London (64%) :**

- 25+ year olds
- Those working
- Those in higher socio-economic groups (ABC1)

### **Great music, festivals, arts and events (36%):**

- Females
- 16-54 year olds
- Parents with children at home
- Those working
- Those in higher socio-economic groups (ABC1)

### **More jobs and opportunities for Londoners (48%):**

- 25-34 year olds
- Parents with children at home
- Those working (In May those not working were more likely to recognise this)

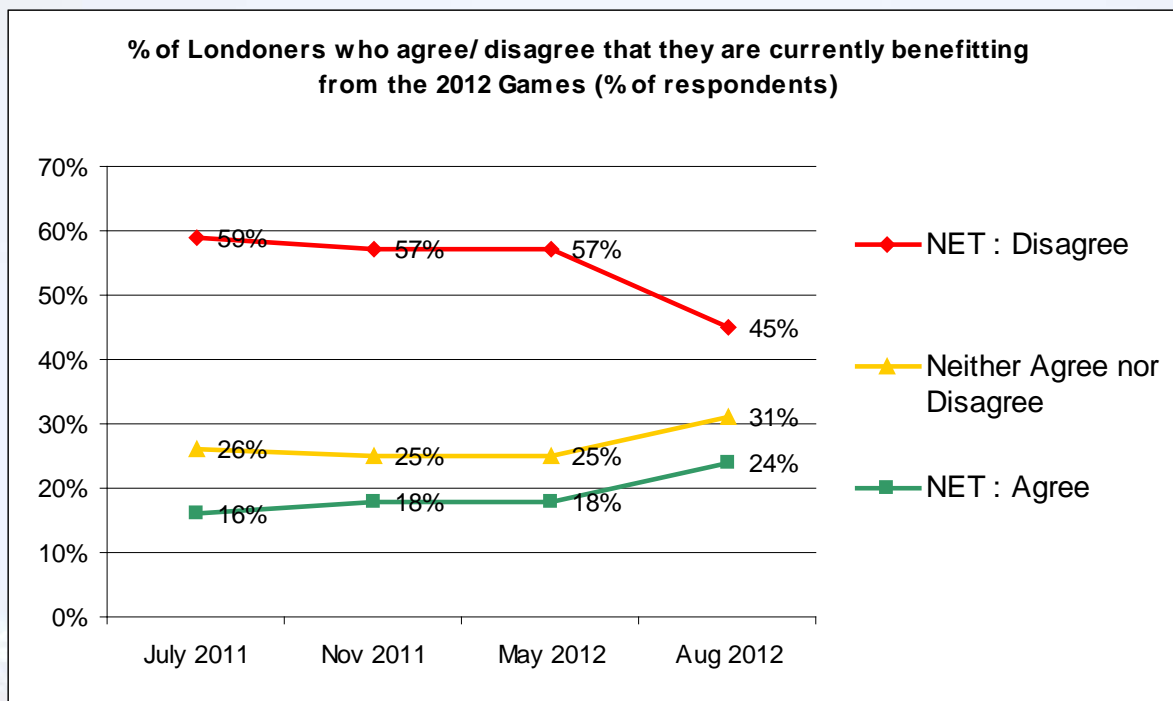
### **None of these (17%):**

- Without children at home
- Those not working
- Those in lower socio-economic groups (C2DE)

## Aim 9 : To track perception of benefits

# Nearly a quarter (24%) of Londoners agree that they are currently benefiting from the Games, this is an increase of 6% since May 2012

- In July last year only 16% of Londoners felt they were benefitting from the Games this rose very slightly as we approached the Games to 18% and during the games has increased to 24%. Those disagreeing has fallen from 57% in May to 45% in August 2012.



### More likely to agree

- Men
- 25-34 yr olds
- Those with children in the household
- Those working
- Higher social grades (ABC1)
- Those who have heard of the SLNO campaign, or seen the adverts and decorations

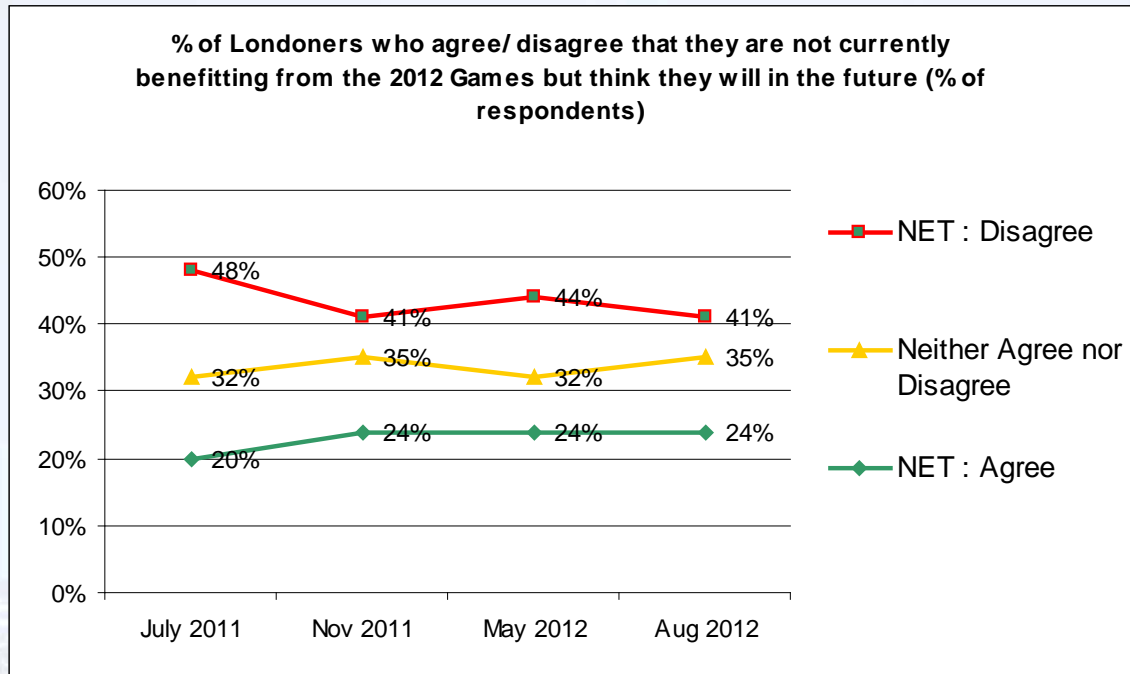
### More likely to disagree

- Women
- 55 + year olds
- Those without children at home
- Those not working
- Those who have not heard of the SLNO campaign or not seen the adverts or decorations

## Aim 9 : To track perception of benefits

# Just under a quarter (24%) feel that they will benefit from the Games in the future, there has been no change in this since November 2011

- Since July 2011 there has been a 4% increase in those that feel they will benefit from the Games in the future, although there has been no increase since November 2011.



### More likely to agree:

- Men
- 16-44 yr olds
- Those with children in the household
- Those working
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts and decorations

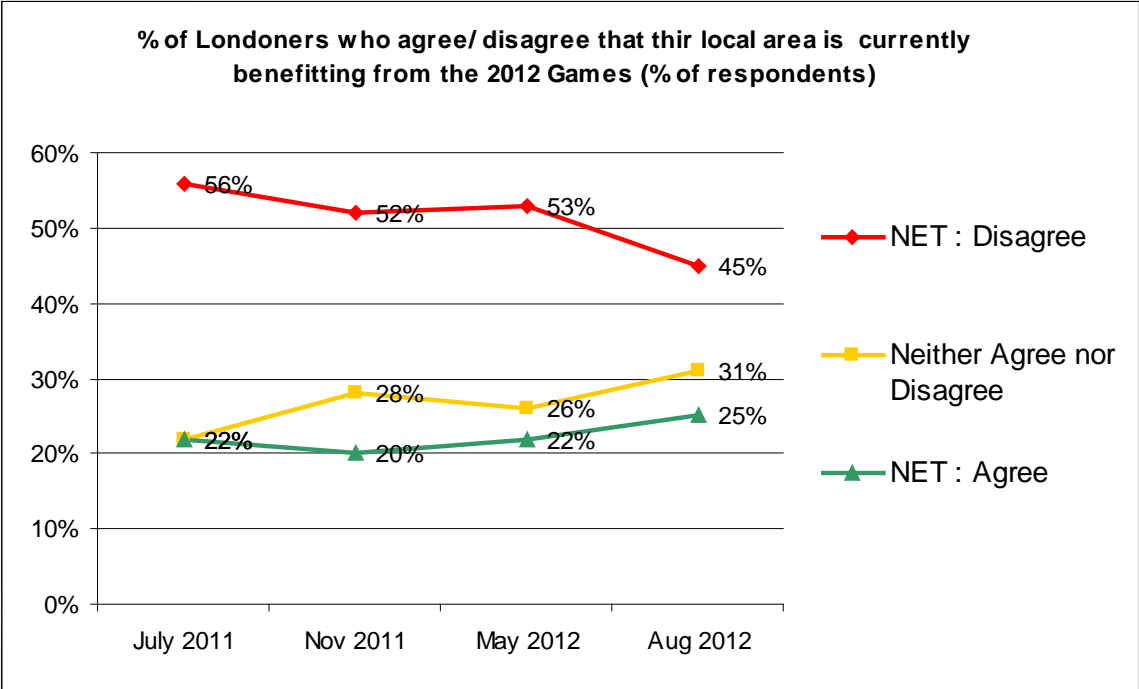
### More likely to disagree

- Women
- 55+ year olds
- Those without children at home
- Those who have not heard of the SLNO campaign, not heard of the website, not seen the adverts or decorations.

**Aim 9 : To track perception of benefits**

**There has been a 3% increase in the number of Londoners who feel their local area is currently benefitting from the Games (25%)**

- There has also been a fall in those who disagree from 53% to 45%.
- People who live in the city of London and the host boroughs are more likely to think that their local area is currently benefiting.



- More likely to agree**
- Men
  - 16-34 yr olds
  - Those with children in the household
  - Those working
  - Those who have heard of the SLNO campaign, heard of the website or seen the adverts and decorations

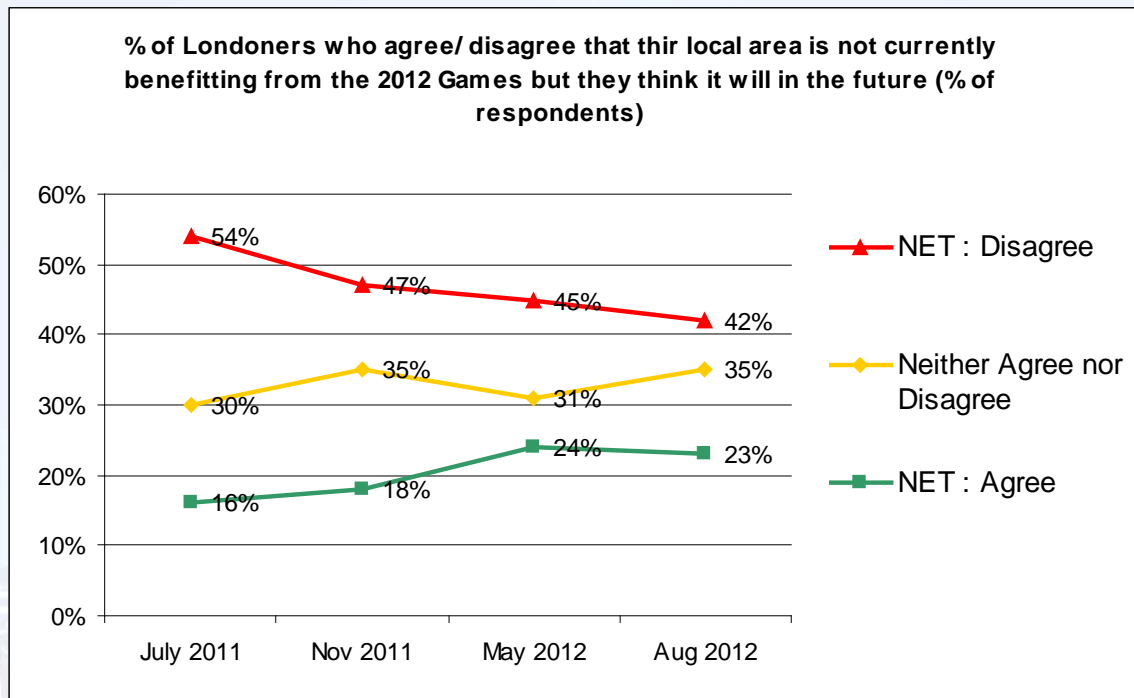
- More likely to disagree**
- Women
  - 55 + year olds
  - Those without children at home
  - Those who have not heard of the SLNO campaign, not heard of the website, not seen the adverts and decorations.

TNS/GLA London Bus 14 – 18 July 2011, 1014 London adults aged 16+ yrs  
TNS/GLA London Bus 17 – 22 Nov 2011, 1020 London adults aged 16+ yrs  
TNS/GLA London Bus 10-15 May 2012, 1018 London adults aged 16+ yrs  
TNS/GLA London Bus 16 – 22 Aug 2012, 1002 London adults aged 16+ yrs

## Aim 9 : To track perception of benefits

# 23% of Londoners think their local area will benefit in the future, while 42% do not think this will happen

- Since July last year there has been a 7% increase in those that think their local area will benefit in the future. However there has been no increase since before the games began in May to August, although those that are not sure has increased and those that disagree continues to fall.



### More likely to agree

- Men
- 25-34 yr olds
- Those with children in the household
- Those working
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts and decorations

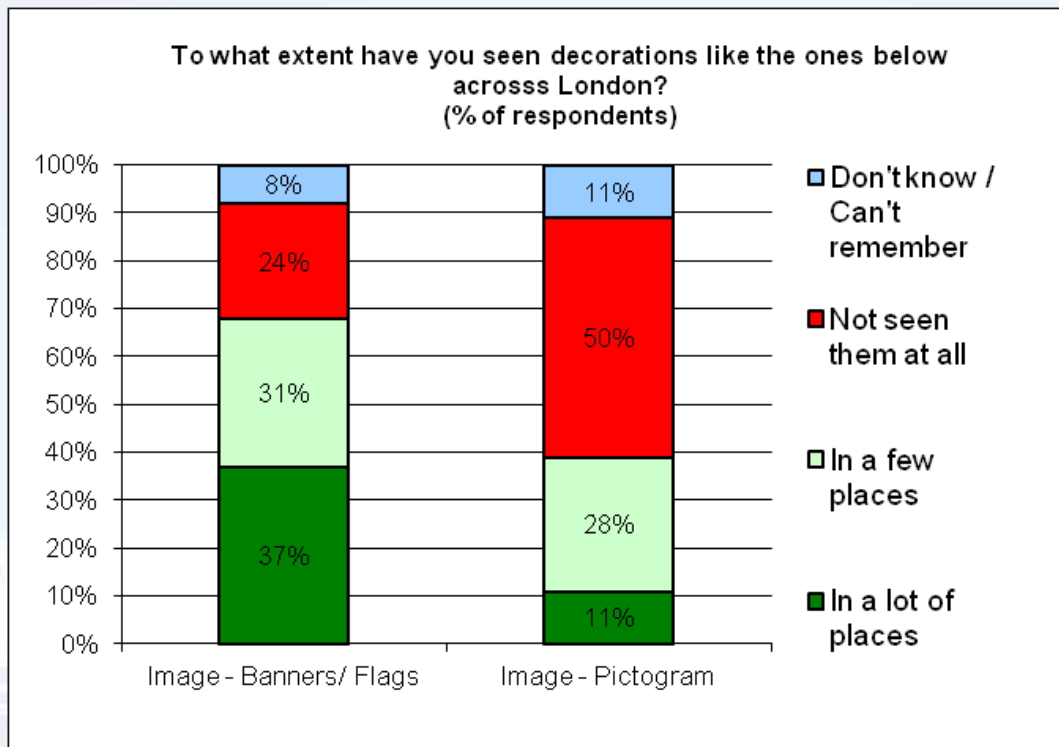
### More likely to disagree

- 55 + year olds
- Those without children at home
- Those who have not heard of the SLNO campaign, not heard of the website, not seen the adverts or decorations.

## Aim 10: To assess the contribution of look and feel

# 68% of Londoners have seen the banners and flags and 39% have seen the pictograms

- Those who have seen the banners and flags is made up of 37% who have seen them in lots of places and 31% who have seen them in a few places. Although 39% have seen the pictograms only 11% have seen them in lots of places.



- Those more likely to have seen the decorations are: 25-34 year olds, those with children at home, those working and those in higher socio-economic groups. Men are more likely to have seen the pictograms than women.

**Aim 10: To assess the contribution of look and feel**

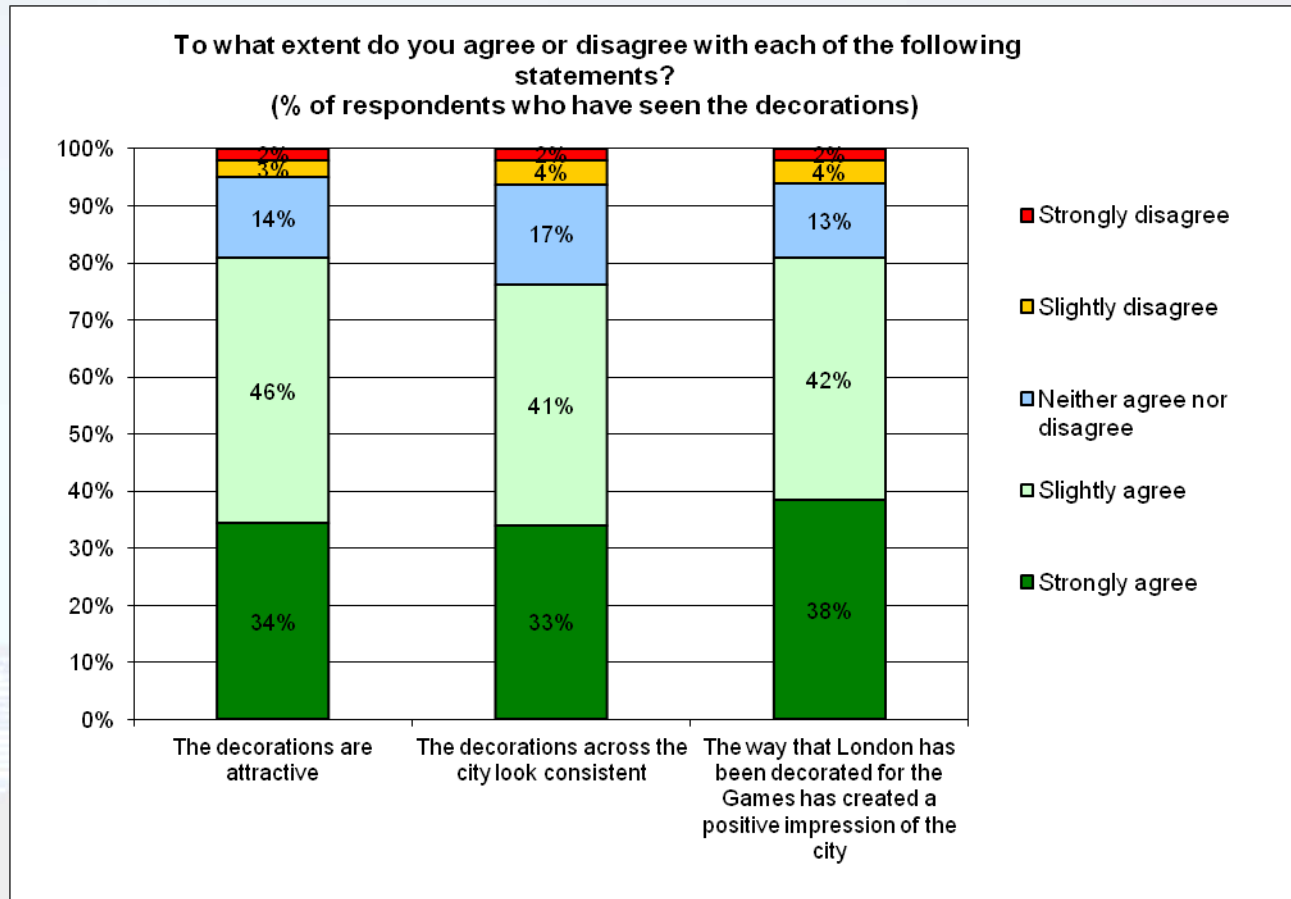
# 80% of Londoners think that the way London has been decorated for the Games has created a positive impression of the city.

- 80% also think that the decorations are attractive and 75% think the decorations look consistent.

There are little demographic differences between those who think the decorations are attractive

Men, 25-44 yr olds, those working and those in higher socio-economic groups are more likely to think the decorations are consistent.

Those aged 25-64, those working and those in higher socio-economic groups are more likely to think they create a positive image of London



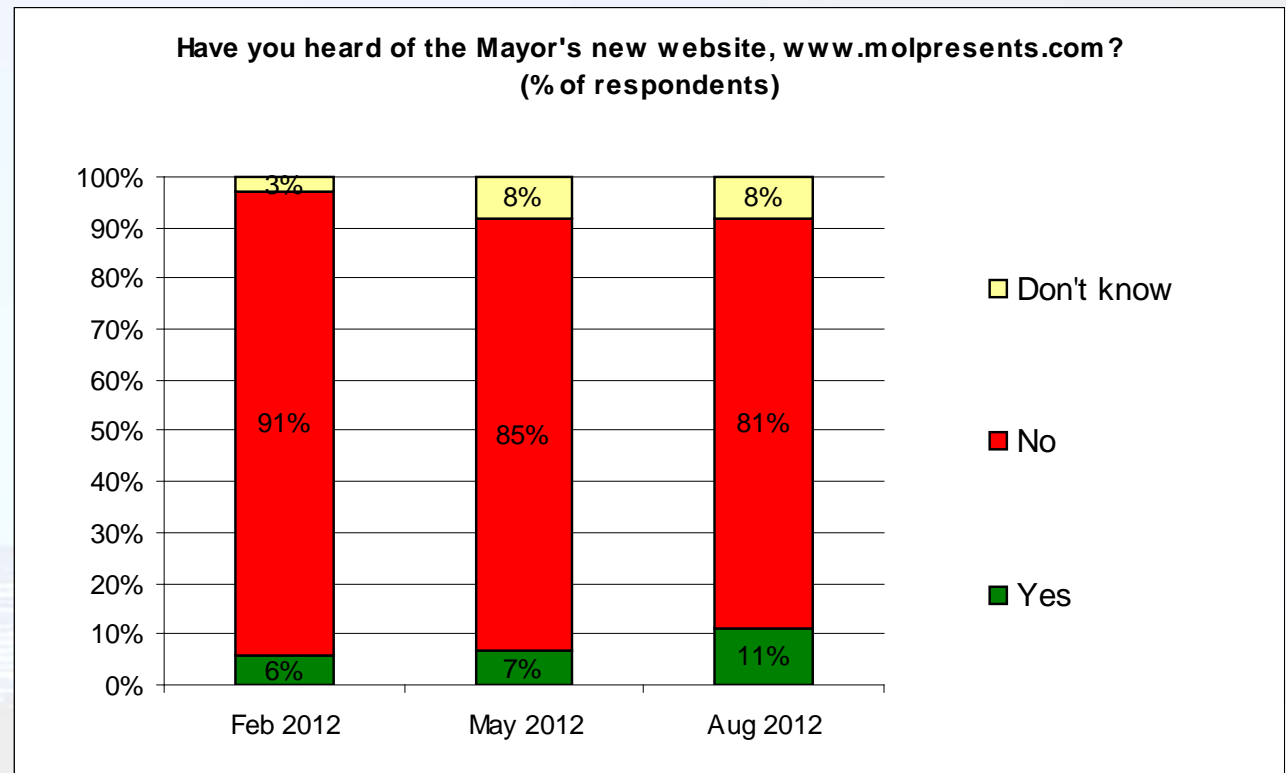
## Aim 11: To ensure everyone is well informed

# 11% of Londoners had heard of the mol presents website, this is 4% more than in May 2012

- Based on the 2012 16+ population of London (6,400,400) and assuming everyone has an equal chance of hearing about the website this 11% equates to 704,044 Londoners

- Of the 106 respondents that had heard of the website, 30% (32 people) had done so through the GLA website, 25% (27 people) through social media and 23% (24 people) through newspapers.

- Note that this is based on a small sample size of 106 respondents and therefore results should be treated with caution.



GLA/TNS – SLNO 9<sup>th</sup>–13<sup>th</sup> Feb 2012, 1007 Londoners 16+ yrs

GLA/TNS – Pre Olympic 10<sup>th</sup> – 15<sup>th</sup> May 2012, 1018 Londoners 16+ yrs

GLA/TNS- During Olympic 16<sup>th</sup> – 22<sup>nd</sup> Aug 2012, 1002 Londoners 16+ yrs