

London 2012 Monitoring

Online survey of Londoners
Post Games – March 2013



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 3102 attending ten events conducted by ICM Research.
 3. Evaluation of the Showtime and Secrets programme including an audience survey of 2848 people across 54 different events
- This presentation outlines the key findings from the fourth and final wave (Post- Games) of online research conducted by TNS from 14th to 20th March 2013. 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.

Key findings – the benefits

- 80% of Londoners know something about what the Mayor of London is doing to ensure Londoners benefit from the 2012 Games now and in the future while one in five Londoners (20%) say they know nothing at all.
- Recognition of the benefits, with the exception of job opportunities, has peaked during the Games and fallen after the Games both in October 2012 and March 2013
- Promoting London around the world remains the most recognised benefit now at 66%. This is followed by Regenerating East London (59%) and 'more chances to get involved in sport' (39%)
- 23% of Londoners feel they have already benefited from the 2012 Games and 22% feel their local area has already benefitted from the 2012 Games
- Nearly a fifth (19%) of Londoners continue to agree that they are currently benefiting from the Games, a fall back to May 2012 levels, following a high of 24% during the Games
- Just over one in five Londoners (21%) feel that they will benefit from the Games in the future while 43% do not think they will benefit in the future
- Those who know more about what the Mayor is doing to ensure Londoners benefit from the Games are more likely to agree that they themselves or their local area has already benefitted, is currently benefitting or will benefit in the future.
- Those more likely to feel they are benefitting are men, younger age groups, those with children at home, those working, those in higher social grades and Inner Londoners.

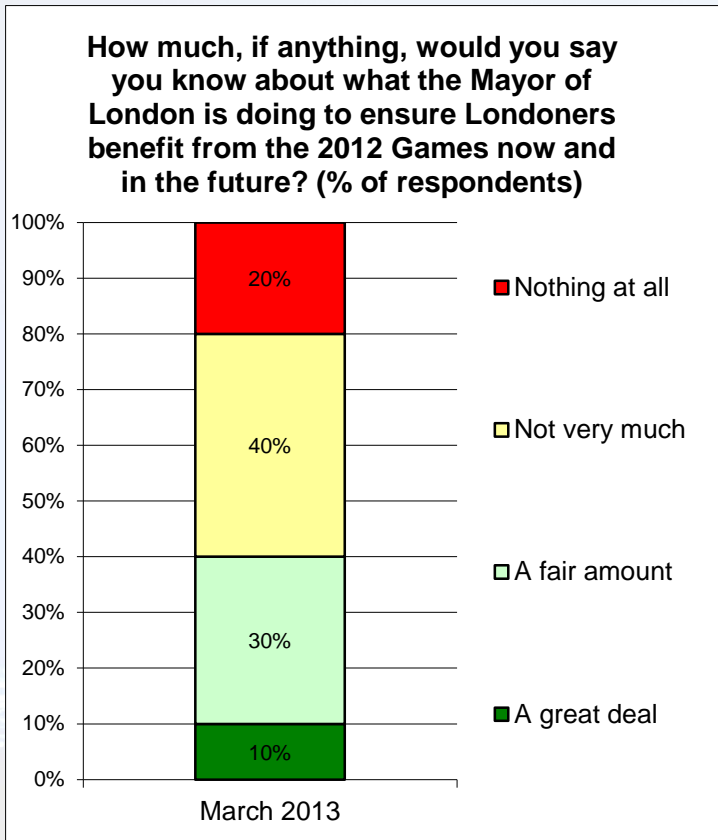
Key findings – the inspiration

- The Games has been an inspiration to many Londoners to walk (35%), cycle (23%) and use public transport (27%) more.
- In October over a third of Londoners (34%) said that the Games had encouraged them to eat more healthily, in March this has fallen slightly to 31%.
- 17% of Londoners say the Games has made them more interested in sport in general and 12% say it introduced them to new sports. However only 4% have taken up a new sport as a result of the Games.
- A quarter of all Londoners (25%) say that the Games have encouraged them to get involved with their local community more.
- 16% of Londoners say they are more interested in events and cultural activities in general and more aware of events put on or supported by the Mayor. 13% intend to take part in more events and 8% say they are actually taking part in events more often.
- 18% of Londoners say that seeing and hearing about the volunteers that helped to deliver the Games has made them more aware of volunteering opportunities but just 5% say they actually now volunteer more often.
- Those who know more about what the Mayor is doing to ensure Londoners benefit from the Games are more likely to think that the Games have encouraged them to do these activities more.
- Those who agree they are currently benefitting from the Games are more likely to think that the Games have encouraged them to do these activities more.
- Those least likely to think the Games will encourage them to do these activities are Women, older people, those without children at home, those not working and Outer Londoners

Aim 1: To assess awareness of Mayors contribution

80% of Londoners know something about what the Mayor of London is doing to ensure Londoners benefit from the 2012 Games now and in the future while one in five Londoners (20%) say they know nothing at all

Half of this 80% say they know at least a fair amount (10% a great deal and 30% a fair amount) while the other half say they know not very much (40%).



Those more likely to know at least a fair amount (NET a great deal/a fair amount) are :

- Men (48% compared to 34% of women)
- Younger age groups (53% for 16-34 year olds compared to 29% for 45+ year olds)
- Parents with children in the household (49% compared to 37% for those without)
- Those who are working (44% compared to 34% of those not working)
- Those who believe they or their local area has already benefitted, is currently benefiting or will benefit in the future

Those more likely to know not very much are:

- Women (46% compared to 34% of men)
- Older age groups (56% for 65+ year olds compared to 26% for 16-24 year olds)
- Those not working (44% compared to 37% working)
- Those from higher social grades (ABC1 44% compared to 34% for C2DE)
- Those who do not think they or their local area has already benefitted, is currently benefiting or will benefit in the future

Those more likely to know nothing at all are:

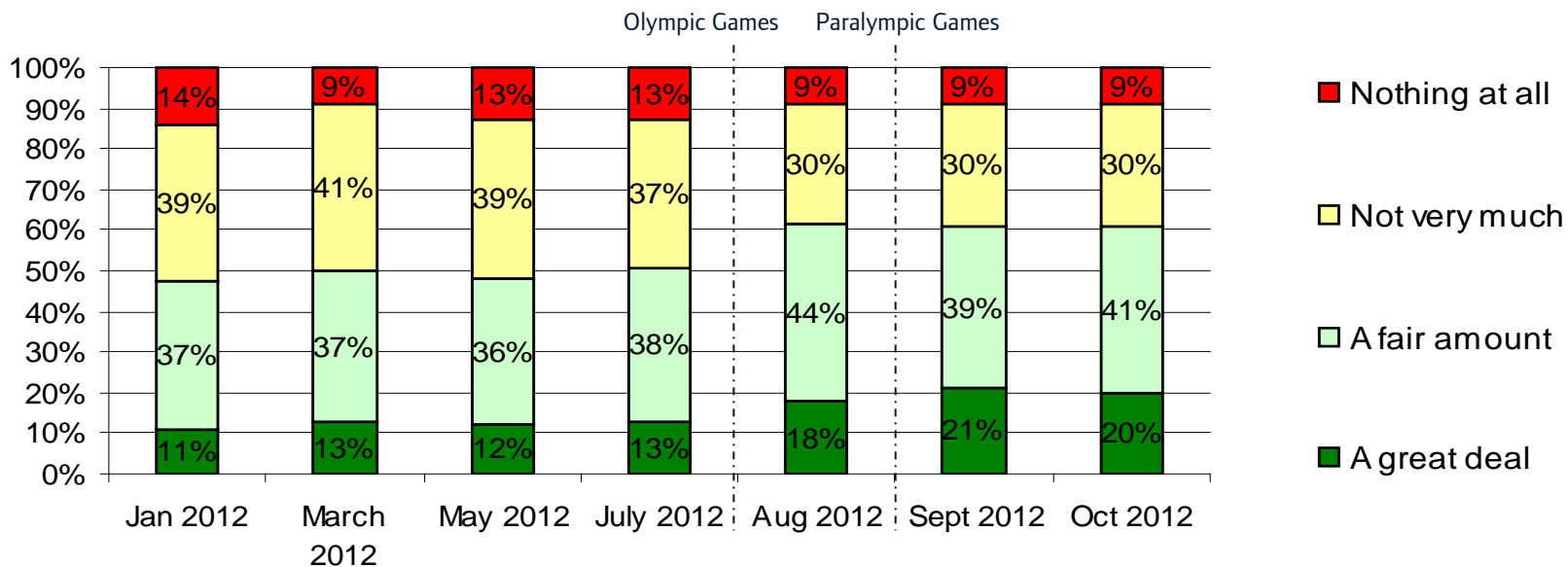
- 45-64 year olds (23% compared to 17% for 16-34 year olds)
- Those without children in the household (22% compared to 13% of those with children at home)
- Those from lower social grades (C2DE 24% compared to 16% for ABC1)
- Those who do not think they or their local area has already benefitted, is currently benefiting or will benefit in the future

Aim 1: To assess awareness of Mayors contribution

Awareness of the Mayor's work to make the Summer of 2012 memorable for Londoners during and following the Games has been higher than awareness of what the Mayor is doing to ensure Londoners benefit from the Games.

- In October 2012 91% of Londoners knew something about what the Mayor did to make the summer memorable and 61% knew at least a fair amount (20% a great deal and 41% a fair amount). Just 9% said that they knew nothing at all.

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



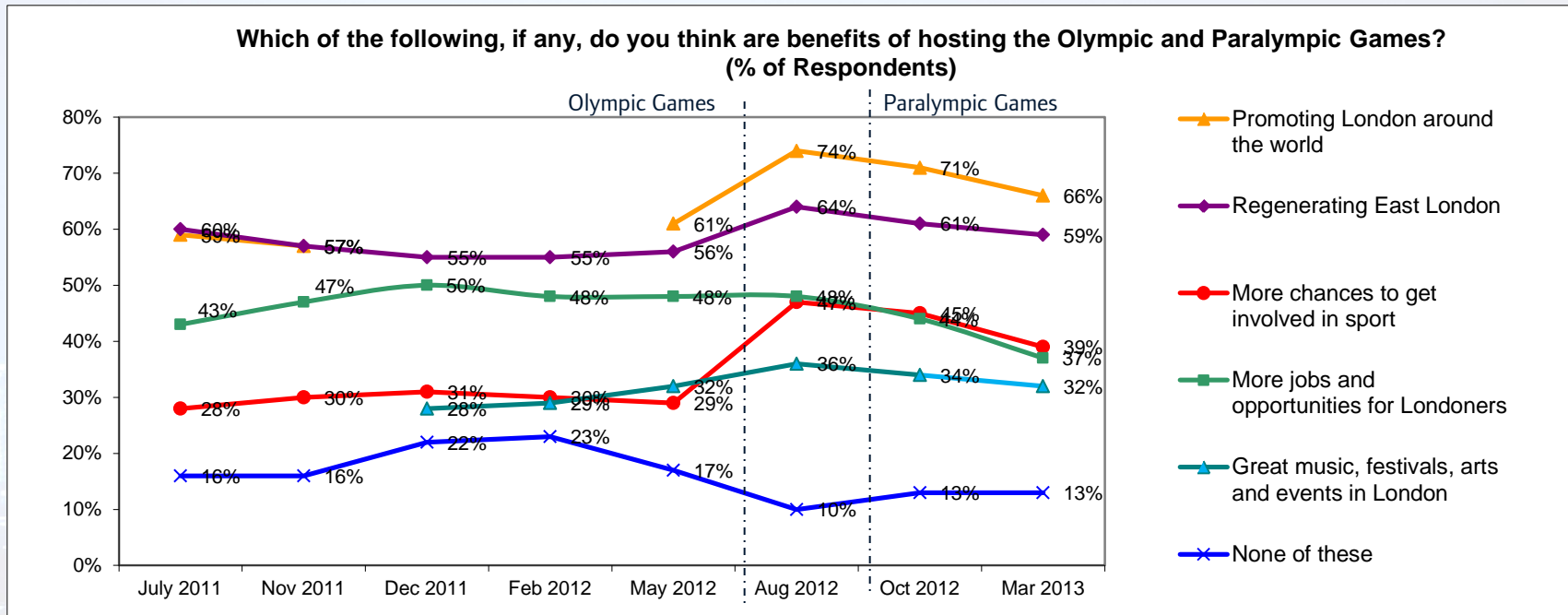
The demographic groups who are more or less likely to know about what the Mayor is doing to ensure Londoners benefit (listed on previous slide) are similar to those groups that are more or less likely to know about what the Mayor did to make the summer memorable.

GLA/TNS – Pre-Free Sport 12th – 16th Jan 2012, 1045 Londoners 16+ yrs
GLA/TNS – Post-Free Sport 15th – 20th March 2012, 1031 Londoners 16+ yrs
GLA/TNS – Pre Games 10th – 15th May 2012, 1018 Londoners 16+ yrs
GLA/TNS – Pre-Gigs 12th–17th July 2012, 1012 Londoners 16+ yrs,
GLA/TNS – During Games 16th – 22nd Aug 2012, 1002 Londoners 16+ yrs
GLA/TNS – Gigs (Post) 13th – 18th September, 1000 Londoners 16+ yrs
GLA/TNS – Post Games 12th – 16th October 2012, 1032 Londoners 16+ yrs

Aim 9 : To track perception of benefits

Recognition of every benefit, with the exception of job opportunities, has behaved similarly, peaking during the Games in August 2012 and falling after the Games in October 2012 and March 2013

- Promoting London around the world remains the most recognised benefit now at 66% having fallen by 8% from August 2012. This is followed by Regenerating East London (59%) and 'more chances to get involved in sport' (39%, a fall of 8% since August but still 10% higher than before the Games began in May 2012).
- Recognition of more jobs and opportunities has fallen gradually from a highpoint of 50% in December 2011, to 37% post-Games. This may reflect Londoners' not experiencing the boost in jobs predicted before the Games, or reflect the perception that many Games-related jobs were temporary and as such have now ended.
- Awareness of great music, festivals and events has fallen by 4% back to May 2012 levels (32%) .
- Only 13% do not recognise any of these benefits which is 10% lower than at the start of 2012 when 23% didn't recognise any of the benefits.



TNS/GLA London Bus

14-18 July 2011, 1014 London adults 16+ yrs, 17 - 22 Nov 2011, 1020 London adults 16+ yrs, 15 - 20 Dec 2011, 1016 London adults 16+ yrs,

9 -13 Feb 2012, 1007 London adults 16+ yrs, 10 -15 May 2012, 1018 London adults, 16-22 Aug 2012, 1002 London adults 16+ yrs,

16 - 22 Oct 2012, 1032 London adults 16+ yrs, 14 - 20 March 2013, 1002 London adults 16+ yrs

Aim 9 : To track perception of benefits

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

- Those who think they have already benefitted from the Games are more likely to recognise each of these benefits.
- Those that they think their local area has already benefitted; they and their local area is currently benefitting or they and their local area will benefit in the future are more likely to think that more chances to get involved in sport, more jobs and opportunities for Londoners and great music festivals and events are benefits of the Games.
- Whether people feel they are benefitting or not does not have an impact on their recognition of promoting London around the world or regenerating East London as benefits
- Older age groups are more likely to recognise promoting of London around the world and the regeneration of East London.
- Younger people , women and those with children at home are more likely to recognise involvement in sports and great music, festivals arts and events

Promoting London around the world (66%):

- Women (69%) - Aug
- 65+ year olds (75%) - Oct
- Those in higher social-economic grades ABC1 (72%) –May, Aug, Oct
- Outer Londoners (69%)

More chances to get involved in sport (39%):

- Women (42%) - Aug
- 16-44 year olds (43%) – May, Aug, Oct
- Parents with children at home (44%) – May, Aug, Oct
- Those in higher socio-economic groups ABC1 (41%) - Aug

More jobs and opportunities for Londoners (37%):

- 16-24 year olds (53%) – May, Aug, Oct but has become a narrower age group

Regenerating East London (59%) :

- 45-65+ year olds (66%) – May, Oct
- Those without children in the household (61%)
- Those in higher socio-economic groups ABC1 (64%) - May, Aug, Oct

Great music, festivals, arts and events (32%):

- Women (35%) – Aug, Oct
- 16-24 year olds (45% May, Aug, Oct but has become a narrower age group)
- Parents with children at home (38%) - Aug

None of these (13%):

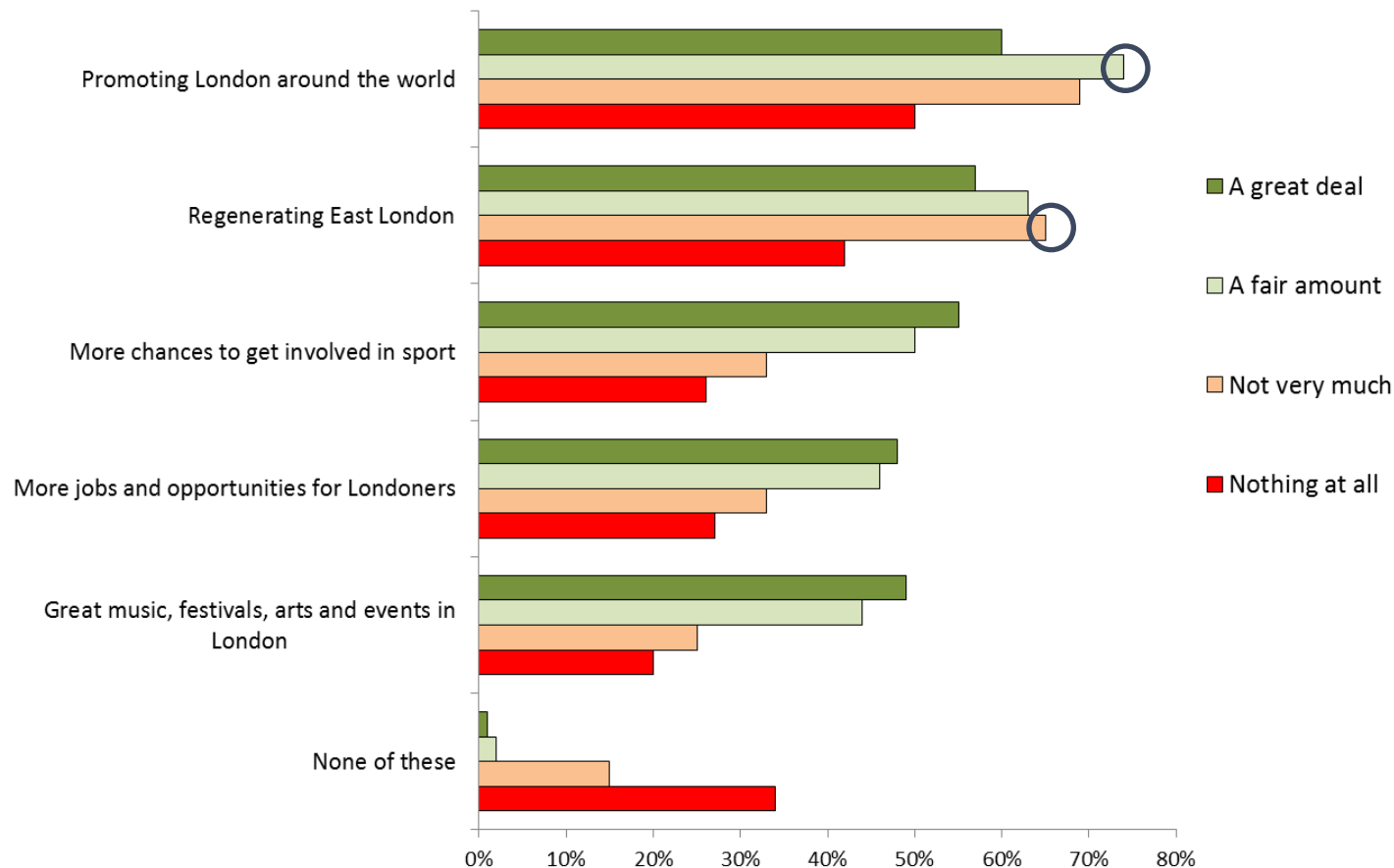
- 55-64 year olds (23%) - May
- Those in lower socio-economic groups (C2DE 16%) – Aug, Oct
- Not benefitting from Games / Local area not benefitting - Oct

Where these demographic differences found in March 2013 are similar to those found in previous surveys this is indicated – May, Aug, Oct. Inner/Outer Londoners was not captured in previous surveys

Aim 9 : To track perception of benefits

There is a correlation between levels of knowledge about what the Mayor of London is doing to ensure Londoners benefit from the 2012 Games now and in the future and recognition of some of the benefits

Recognition of the different benefits compared to levels of knowledge about what the Mayor is doing to ensure Londoners benefit from the Games (% of respondents)



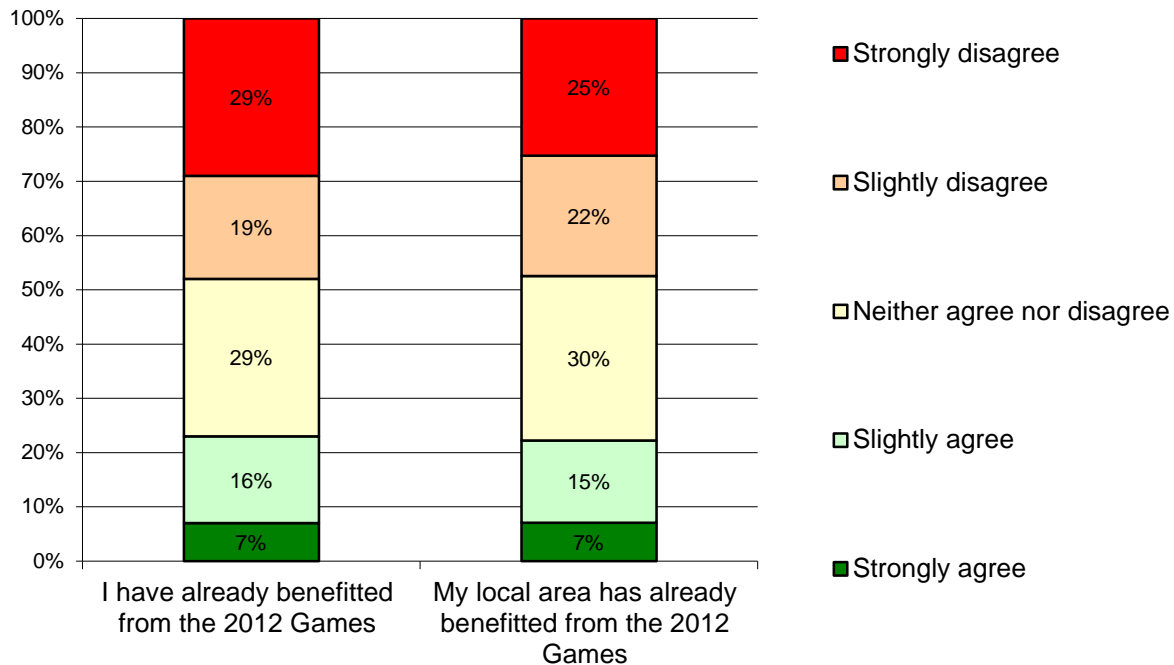
- Those who know a great deal about what the Mayor is doing to ensure Londoners benefit from the Games are more likely to recognise more chances to get involved in sport, more job opportunities for Londoners and Great music, festivals arts and events.
- This correlation between levels of awareness and recognising benefits is not seen for all benefits.
- Those who know not very much about what the Mayor is doing are more likely to recognise the regeneration of East London while those that know a fair amount are more likely to recognise promoting London around the world as a benefit

Aim 9 : To track perception of benefits

23% of Londoners feel they have already benefited from the 2012 Games and 22% feel their local area has already benefitted from the 2012 Games

- At the same time nearly half of all Londoners do not think they (48%) or their local area (47%) has already benefitted and around 30% neither agree nor disagree with these statements

How much do you agree or disagree with the following statements? (% of respondents)



Those more likely to agree with both of these statements are:

- Men
- 16-44 year olds
- Those with children in the household
- Those working
- Higher social grades (ABC1)
- Inner Londoners
- Those who know more about what the Mayor is doing to ensure Londoners benefit from the Games

Those more likely to disagree with both of these statements are:

- Women
- 45 + year olds
- Those without children at home
- Those not working
- Outer Londoners
- Those who know less about what the Mayor is doing to ensure Londoners benefit from the Games

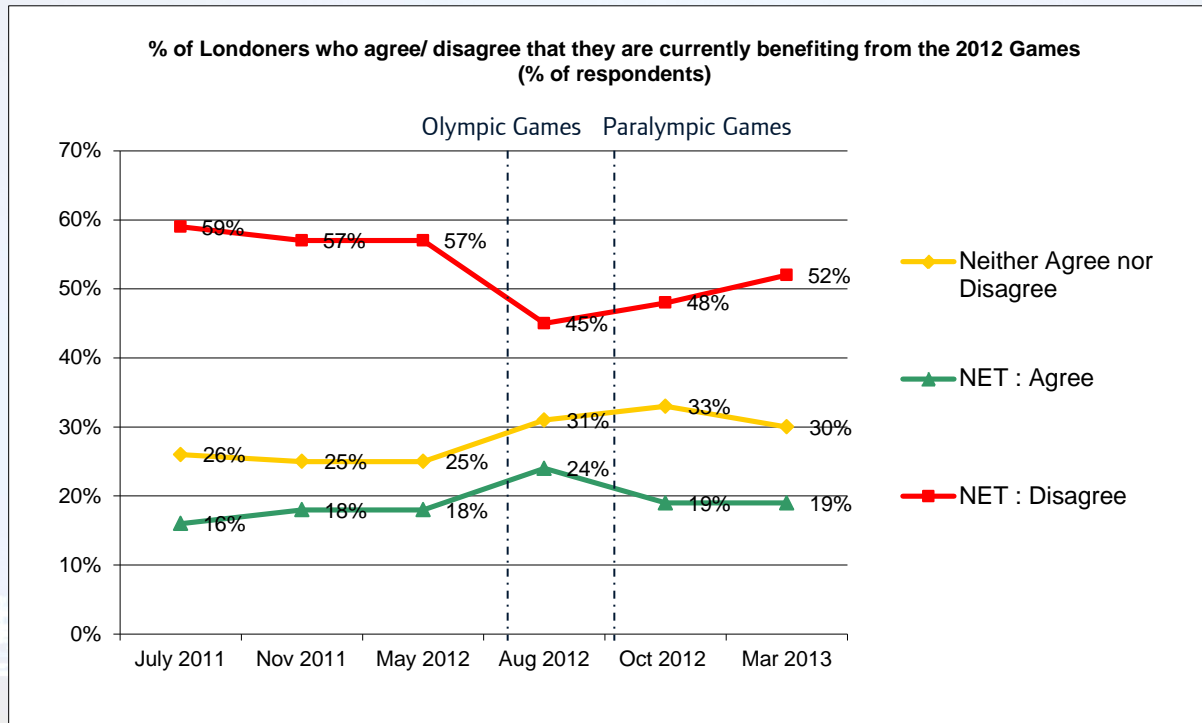
Aim 9 : To track perception of benefits

Nearly a fifth (19%) of Londoners continue to agree that they are currently benefiting from the Games, a fall back to May 2012 levels, following a high of 24% during the Games

As may be expected, there was an increase in agreement and a decrease in disagreement during the Games

In July 2011 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 it increased further to 24%. In October 2012 and March 2013 it has remained at 19%

Those disagreeing has risen since the Games to 52% but is still lower than it was pre Games in May 2012.



Those more likely to agree are:

- Men
- 16-44 yr olds
- Those with children in the household
- Those working
- Higher social grades (ABC1)
- Inner Londoners
- Those who know more about what the Mayor is doing to ensure Londoners benefit

Those more likely to disagree are:

- Women
- 45 + year olds
- Those without children at home
- Those not working
- Lower social Grades (C2DE)
- Outer Londoners
- Those who know less about what the Mayor is doing to ensure Londoners benefit

These differences are seen across all previous waves of research

TNS/GLA London Bus

14 - 18 July 2011, 1014 London adults aged 16+ yrs ; 17 - 22 Nov 2011, 1020 London adults aged 16+ yrs:

10 - 15 May 2012, 1018 London adults aged 16+ yrs; 16 - 22 Aug 2012, 1002 London adults aged 16+ yrs;

12 -16 Oct 2012, 1032 London adults aged 16+ yrs; 14 -16 March 2013, 1002 London adults aged 16+ yrs

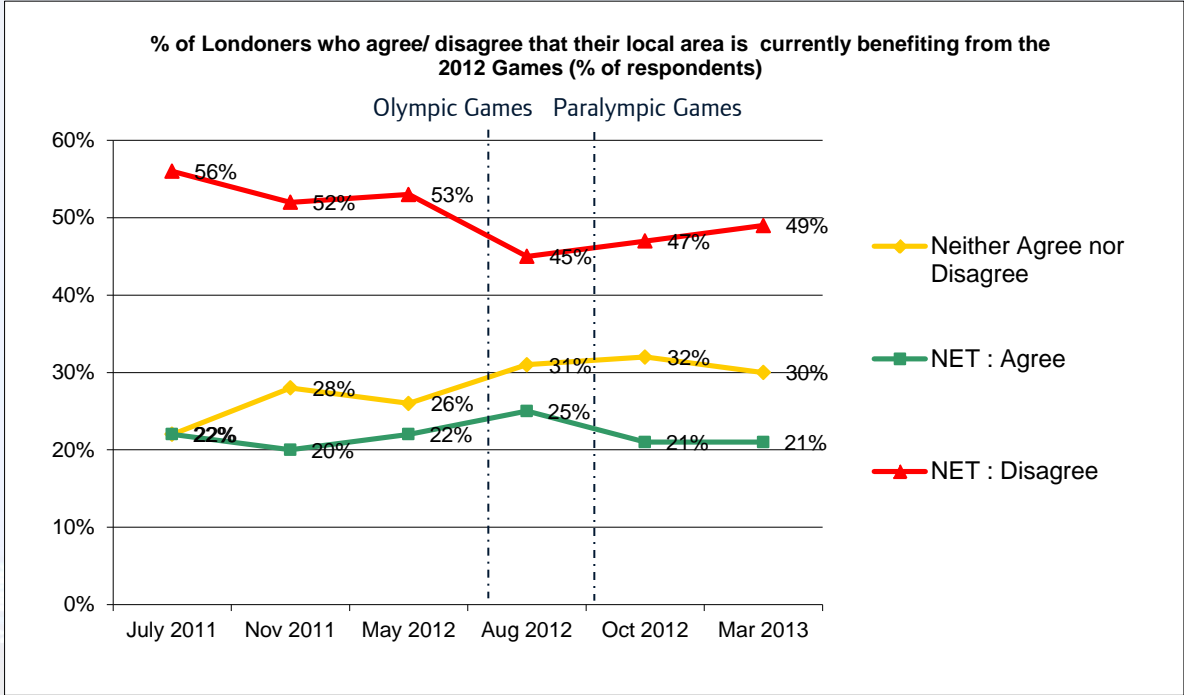
Aim 9 : To track perception of benefits

Since the Games, the number of Londoners who feel their local area is currently benefitting has fallen back to pre-Games levels and remains stable at 21%.

As in October 21% of Londoners think that their local area is currently benefitting from the Games, similar to levels seen before the Games

There has been a slight increase in those that disagree from 47% to 49% but this disagreement is still lower than before the Games levels (53% in May 2012)

Those that are unsure if their local area is currently benefiting remains around 30%



Those more likely to agree

- Men
- 16-34 yr olds
- Those with children in the household
- Those working
- Inner Londoners
- Those who know more about what the Mayor is doing to ensure Londoners benefit from the Games

Those more likely to disagree are:

- Women
- 45 + year olds
- Those without children at home
- Those not working
- Those who know less about what the Mayor is doing to ensure Londoners benefit from the Games.

These differences are seen across all previous waves of research

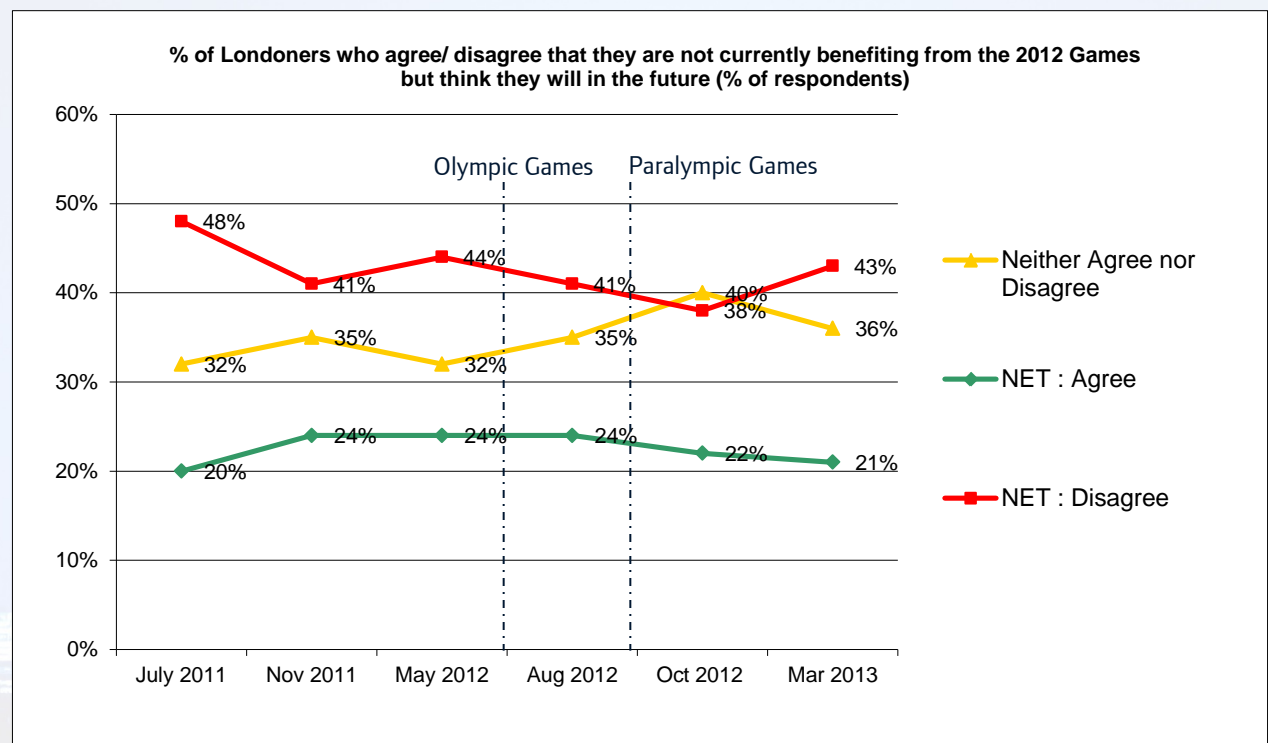
TNS/GLA London Bus

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12 -16 Oct 2012, 1032 London adults aged 16+ yrs; 14 -16 March 2013, 1002 London adults aged 16+ yrs

Aim 9 : To track perception of benefits

Just over one in five Londoners (21%) feel that they will benefit from the Games in the future. However disagreement has increased and now 43% do not think they will benefit in the future

There has been no significant increase in those that feel they will benefit from the Games in the future compared to the July 2011 figure, there was a 4% increase seen in November 2011 which was maintained through May and August but following the Games has fallen to 21%. Londoners have become more sure that they will not benefit in the future – since October disagreement among Londoners that they will benefit from the Games in the future has risen from 38% to 43% while those feeling unsure has fallen from 40% to 36%



Those more likely to agree:

- Men
- 16-44 yr olds
- Those with children in the household
- Those working
- Inner Londoners
- Those who know more about what the Mayor is doing to ensure Londoners benefit from the Games

Those more likely to disagree are:

- Women
- 45 – 64 year olds
- Those without children at home
- Those who know less about what the Mayor is doing to ensure Londoners benefit from the Games

These differences are seen across all previous waves of research

TNS/GLA London Bus
14 - 18 July 2011, 1014 London adults aged 16+ yrs ; 17 - 22 Nov 2011, 1020 London adults aged 16+ yrs;
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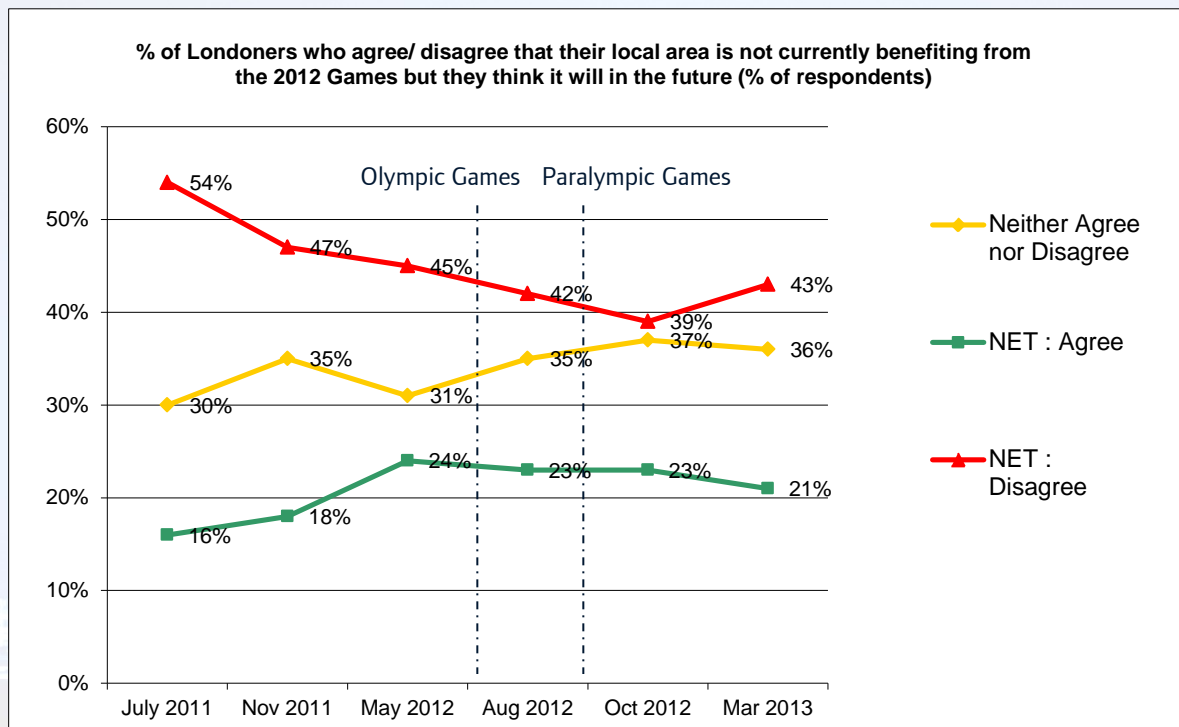
Aim 9 : To track perception of benefits

There has been a slight fall in the number of Londoners who think their local area will benefit in the future to 21%. 43% do not think this will happen.

21% think that their local area will benefit in the future. Although this has fallen from 24% in May it is still 5% higher than when first asked in July 2011.

Disagreement has increased from a low of 39% in October to 43%, similar to August levels. However this is still lower than in July 2011 when it was at a high of 54% .

Those that are unsure if their local area will benefit in the future remains stable at 36%.



Those more likely to agree are:

- Men
- 16-44 yr olds
- Those with children in the household
- Those working
- Higher social grades (ABC1)
- Inner Londoners
- Those who know more about what the Mayor is doing to ensure Londoners benefit from the Games

Those more likely to disagree are:

- Women
- 45 -64 year olds
- Outer Londoners
- Those who know less about what the Mayor is doing to ensure Londoners benefit.

These differences are seen across all previous waves of research

TNS/GLA London Bus

14 - 18 July 2011, 1014 London adults aged 16+ yrs ; 17 - 22 Nov 2011, 1020 London adults aged 16+ yrs:

10 - 15 May 2012, 1018 London adults aged 16+ yrs; 16 - 22 Aug 2012, 1002 London adults aged 16+ yrs;

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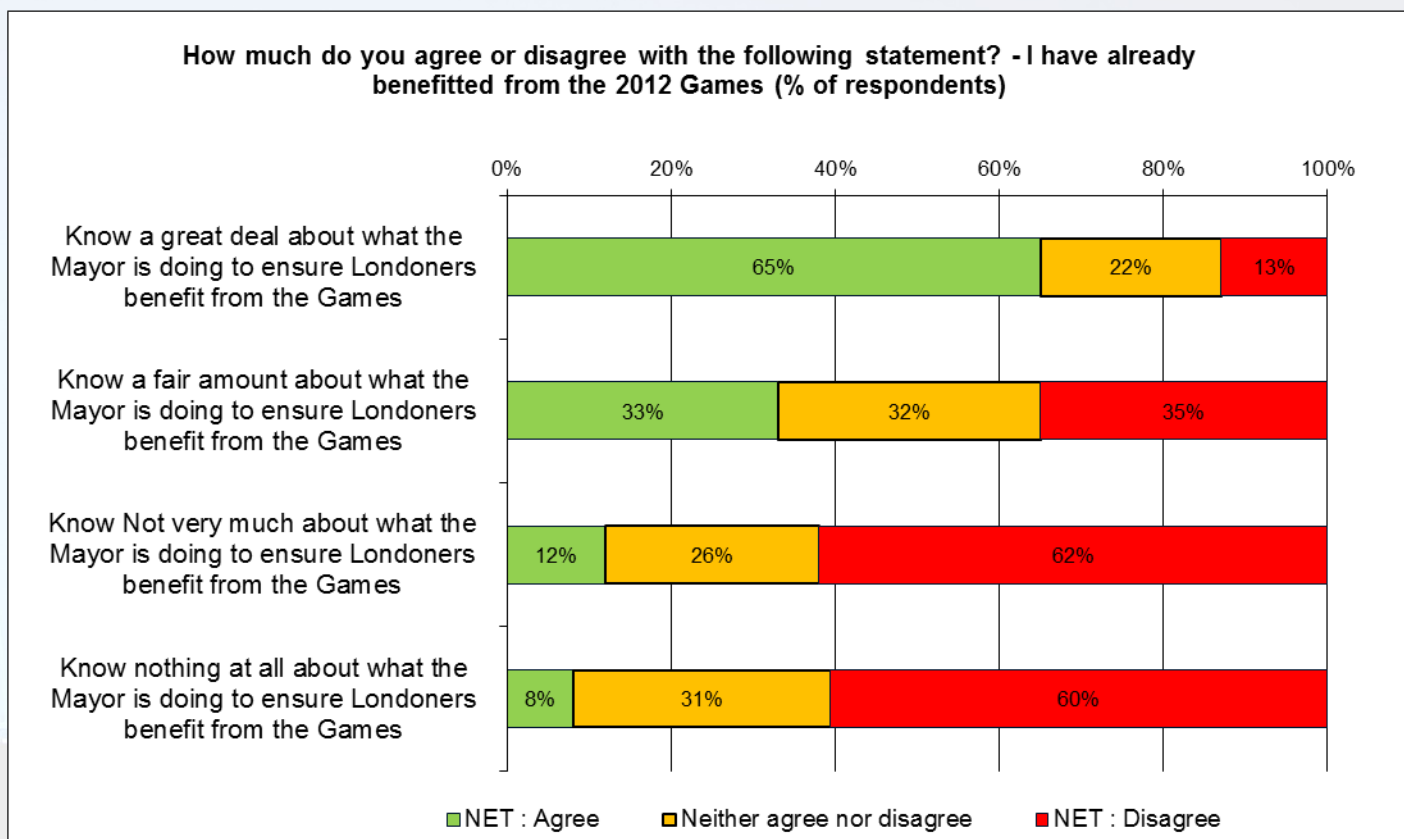
Aim 4: To evaluate the impact of marketing and comms

As seen previously there is a correlation between the perception of the benefits of the Games and knowledge about the Mayors work

- Those who know more about what the Mayor is doing to ensure Londoners benefit from the Games are more likely to agree that they themselves or their local area has already benefitted, is currently benefitting or will benefit in the future.
- This chart illustrates this correlation for those that agree or disagree that they have already personally benefitted from the Games.

65% of those who know a great deal about what the Mayor is doing agree they have already benefitted compared to just 8% of those who know nothing agreeing they have already benefitted. A similar correlation can be found for:

- Currently personally benefitting
- Will personally benefit in the future
- Local area already benefitted
- Local area currently benefitting
- Local area will benefit in the future

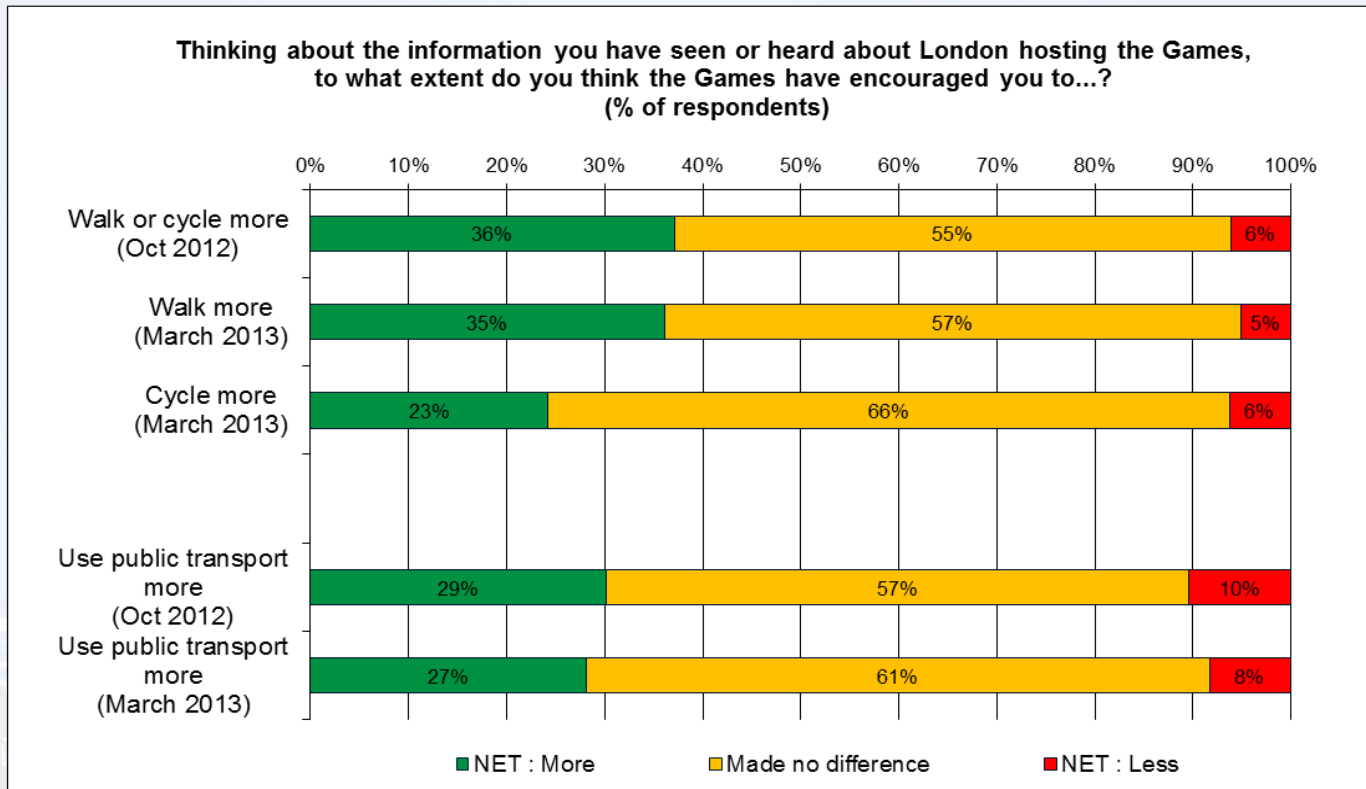


Aim 12: To assess the impact of the Games on Londoners

Information about the Games has been an inspiration to many Londoners to walk, cycle and use public transport more

In October we found over a third of Londoners have been encouraged to walk/cycle more (36%). In March we split this question. A similar amount 35% said they had been encouraged to walk more while nearly a quarter (23%) said the Games had encouraged them to cycle more.

In October 29% said they thought the Games had encouraged them to use public transport more as, this has remained fairly similar in March at 27%.



Those more likely to walk/cycle/ use public transport more are:

- Men (Oct – public transport only)
- 16-44 year olds (Oct)
- Those with children in household (Oct)
- Those working (Oct)
- Higher social grades (ABC1) (although not seen for walking)
- Inner Londoners
- Those that have benefitted, are benefitting or think they will benefit in the future
- Those who know more about what the Mayor is doing to ensure Londoners benefit

Where these demographic differences found in Mar 2013 are similar to those found in Oct 2012 this is indicated. Inner/Outer Londoners was not captured in previous surveys

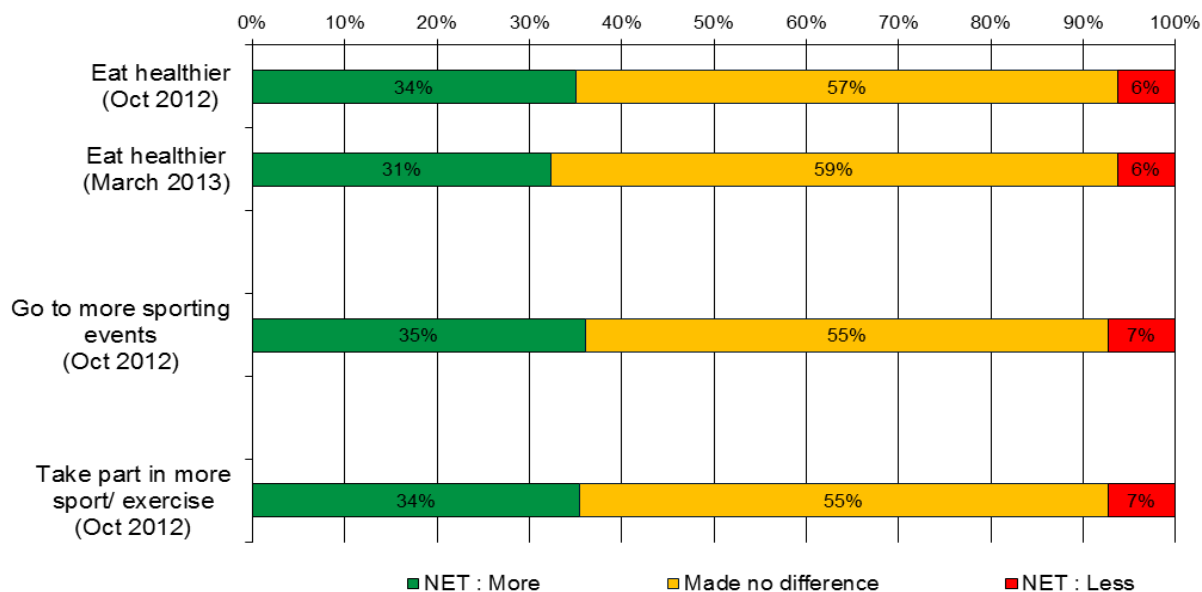
Aim 12: To assess the impact of the Games on Londoners

Information about the Games has also encouraged people to eat more healthier, go to more sporting events and take part in more sports and exercise

In October over a third of Londoners (34%) said that the Games had encouraged them to eat more healthily, in March this has fallen slightly to 31%.

Also in October over a third of Londoners said the Games had encouraged them to go to more sporting events (35%) and take part in more sport and exercise (34%). In March we explored these in more detail (see next slide)

Thinking about the information you have seen or heard about London hosting the Games, to what extent do you think the Games have encouraged you to...?
(% of respondents)



Those more likely to...

eat healthier (Oct and March) are:

- Men
- 16-44 year olds (Oct)
- Those with children in household
- Those working (Oct)
- Those that have benefitted, are benefitting or think they will benefit in the future
- Those who know more about what the Mayor is doing to ensure Londoners benefit

take part in more exercise (Oct) are:

- Men
- 16-44 year olds
- Those with children in household

go to more sporting events (Oct) are :

- 16-44 year olds
- Those with children in the household
- Those in work
- Social groups ABC1

Where demographic differences found in Mar 2013 are similar to those found in Oct 2012 this is indicated.

Aim 12: To assess the impact of the Games on Londoners

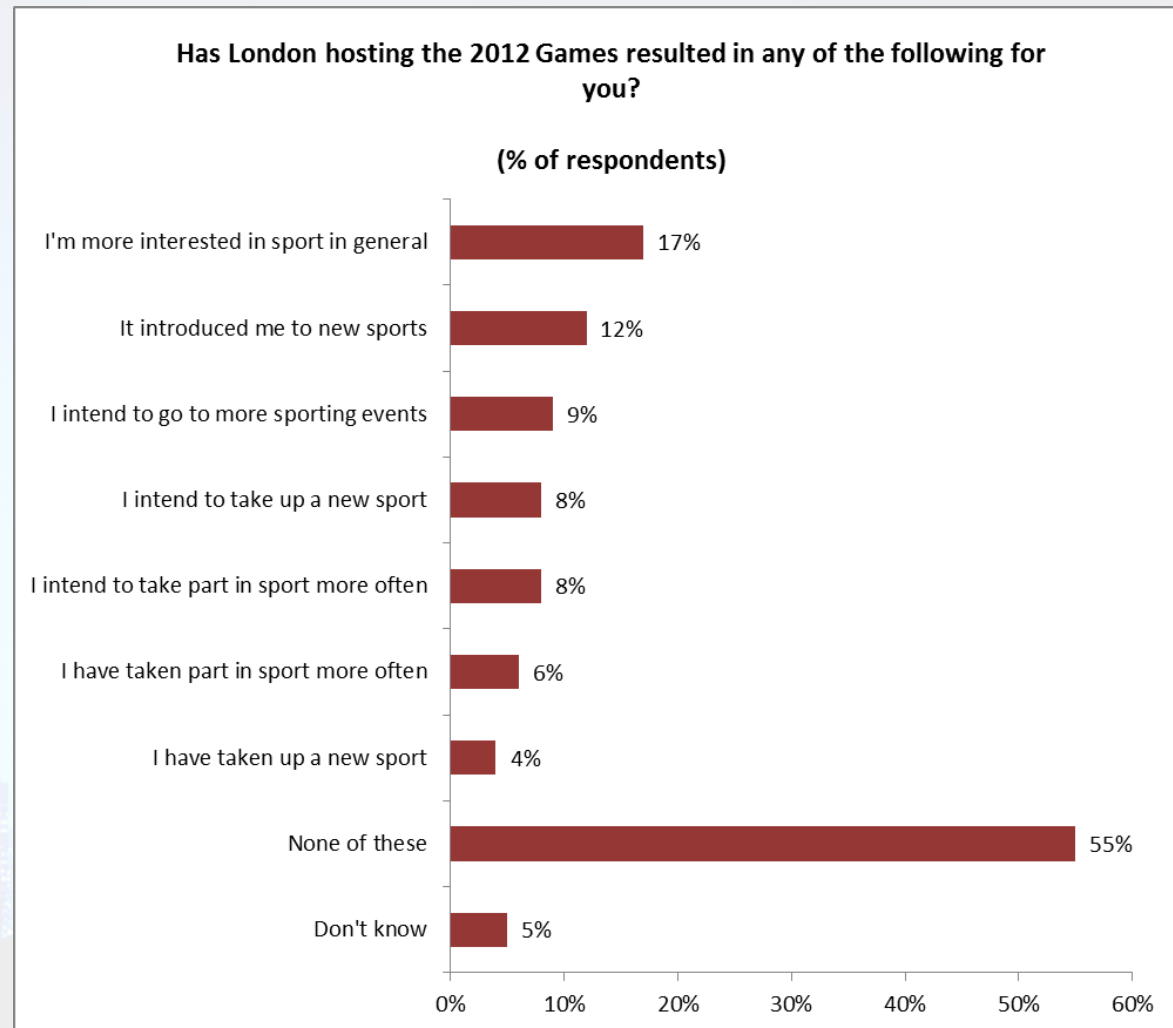
17% of Londoners say the Games has made them more interested in sport in general and 12% say it introduced them to new sports

However levels of actual participation are lower with just 6 % saying they have taken part in sport more often and only 4% have taken up a new sport as a result of London hosting the Games.

55% of Londoners say that the Games hasn't resulted in any of these things for them

Those more likely to have done none of these things are:

- Women
- 55+ year olds
- Those without children at home
- Those not working
- Outer Londoners
- Those that do not think they already have, are, or will benefit from the Games
- Those that know less about what the Mayor is doing to ensure Londoners benefit from the Games

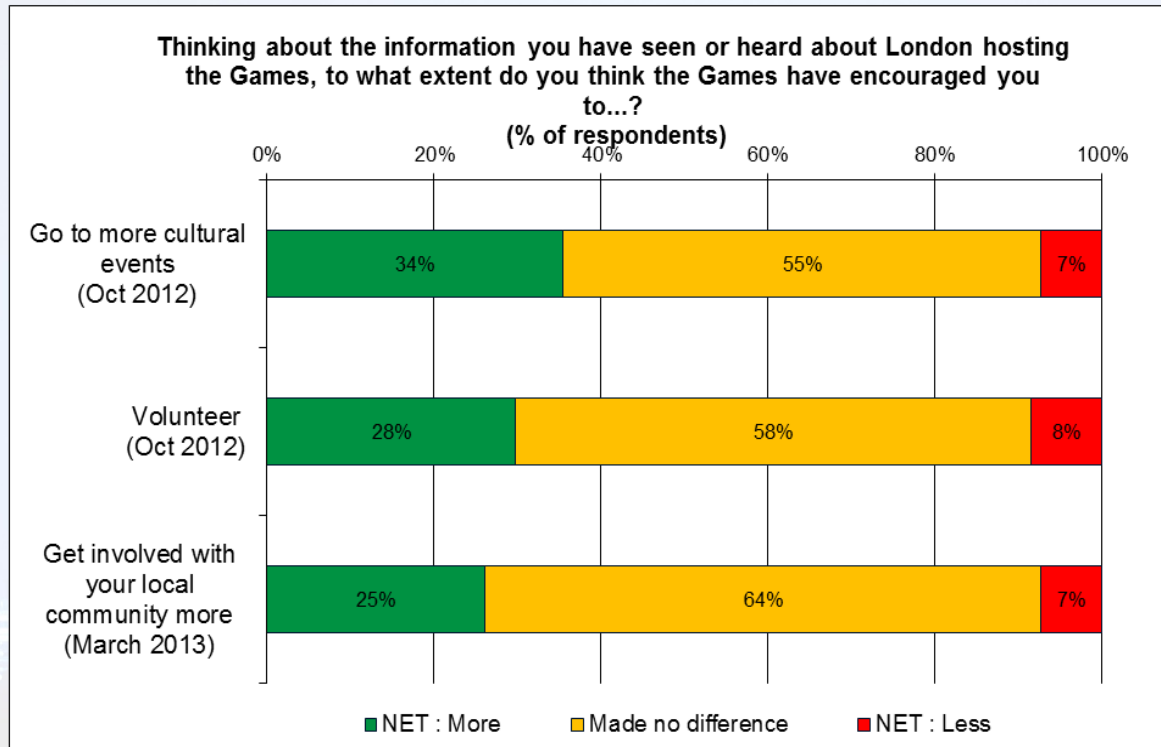


Aim 12: To assess the impact of the Games on Londoners

A quarter of all Londoners say that the Games have encouraged them to get involved with their local community more

At the same time nearly two thirds (64%) said the Games had made no difference to their involvement with their local community.

In October over a third (34%) of Londoners said that the Games had encouraged them to go to more cultural events. At the same time 28% said the Games had encouraged them to volunteer. In March we explored these areas in more detail (see the following slides)



Those more likely to...

get involved in their local community more are (March):

- Men
- 16-44 year olds
- Those with children in household
- Those working
- Higher social grades (ABC1)
- Inner Londoners
- Those that have benefitted, are benefitting or think they will benefit in the future
- Those who know more about what the Mayor is doing to ensure Londoners benefit

Go to more cultural events are (Oct):

- Men
- 16-44 year olds
- Those with children in household
- Those in work

Volunteer are (Oct):

- 16-44 year olds
- Those with children in household
- Those in work
- Social group ABC1

Aim 12: To assess the impact of the Games on Londoners

16% of Londoners say they are more interested in events and cultural activities in general and more aware of events put on or supported by the Mayor

16% also say that seeing and hearing about all the free events and cultural activities in London at the time of the Games has introduced them to events and cultural activities taking place in London.

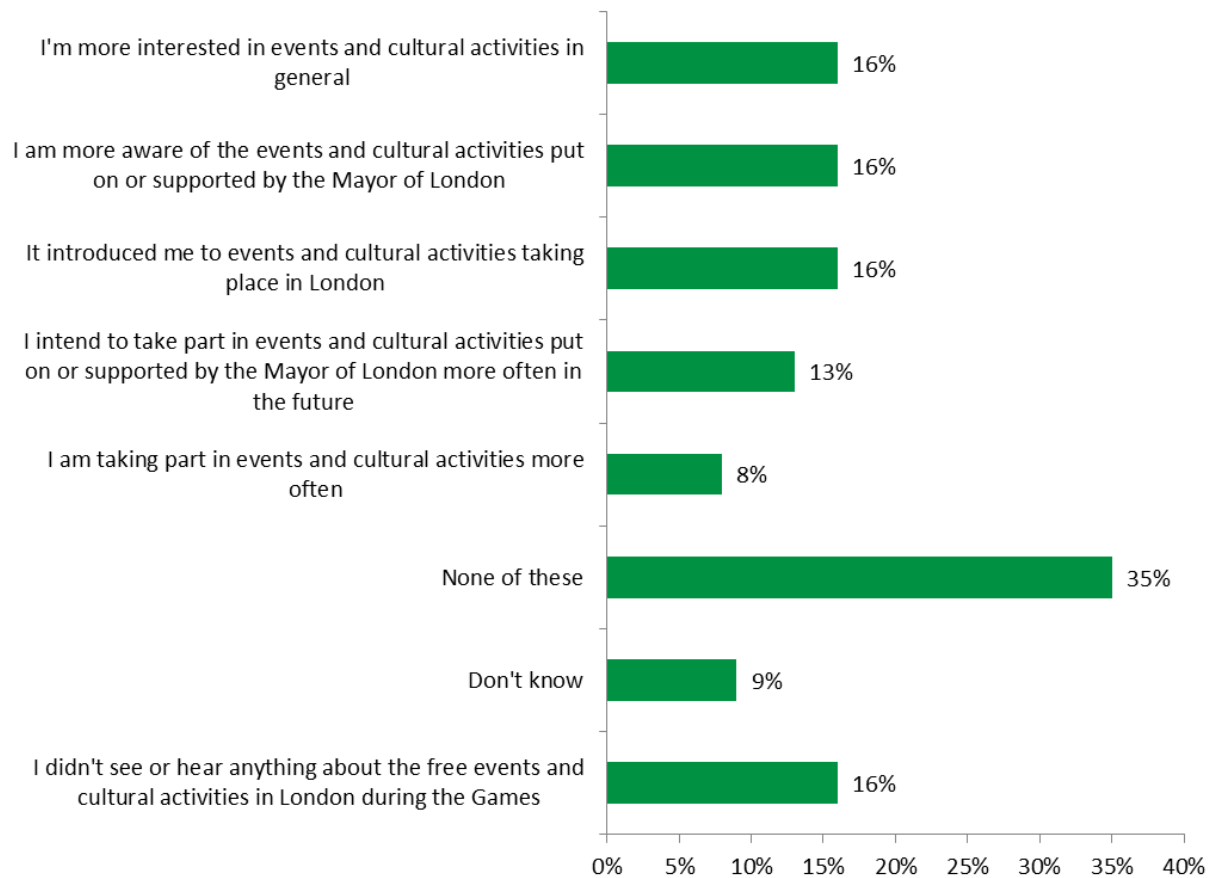
13% intend to take part in more events and 8% say they are actually taking part in events more often.

35% say seeing and hearing about the events has not resulted in any of these things for them while 16% say they didn't see or hear anything about the free events.

Those more likely not to have done these things are:

- 45+ year olds
- Those without children at home
- Outer Londoners
- Those that do not think they already have, are, or will benefit from the Games
- Those that know less about what the Mayor is doing to ensure Londoners benefit from the Games

Has seeing and hearing about all the free events and cultural activities in London at the time of the Games resulted in any of the following for you?
(% of respondents)



Aim 12: To assess the impact of the Games on Londoners

18% of Londoners say that seeing and hearing about the volunteers that helped to deliver the Games has made them more aware of volunteering opportunities

14% say they are now more interested in volunteering and 13% say they intend to volunteer more often in the future.

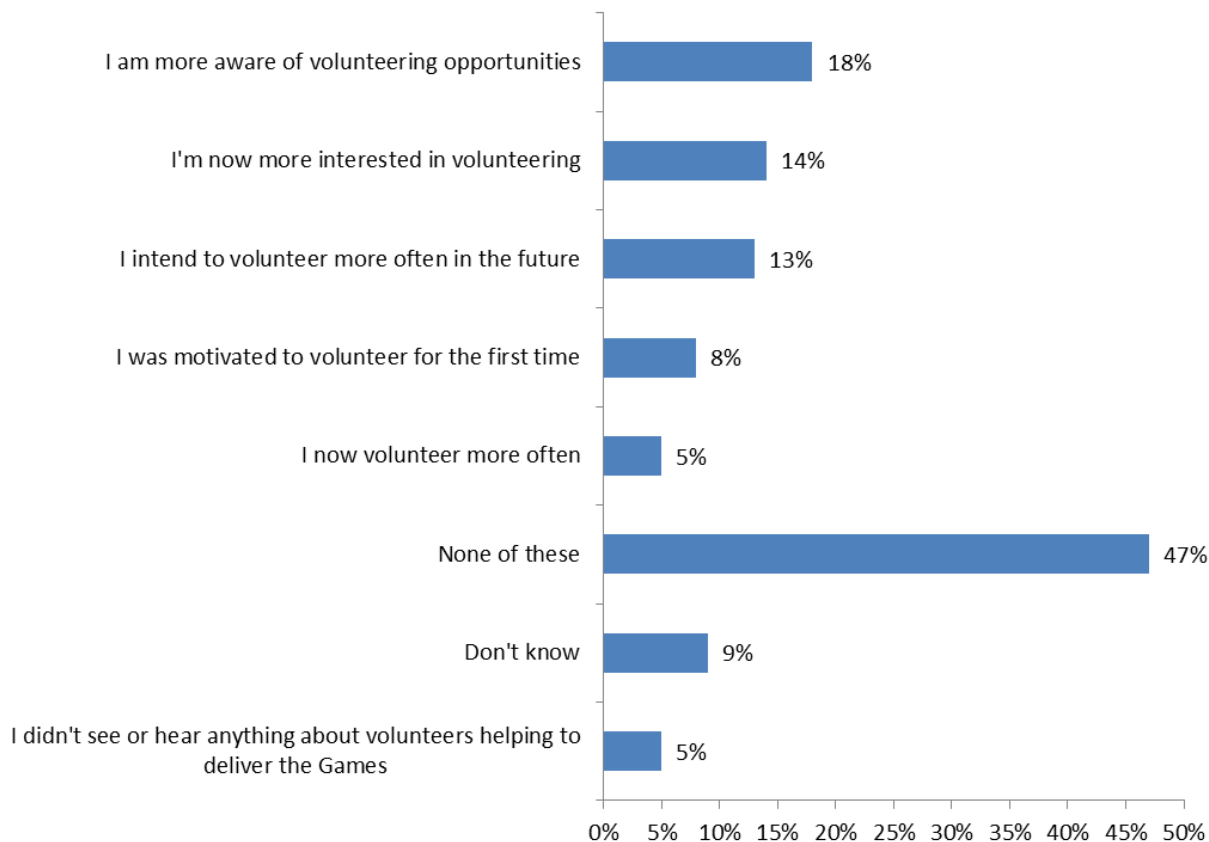
However just 5% say they actually now volunteer more often and only 8% say they were motivated to volunteer for the first time

47% say that seeing and hearing about the volunteers has not resulted in any of these things for them.

Those more likely not to have done these things are:

- Women
- 45+ year olds
- Those without children at home
- Those not working
- Outer Londoners
- Those that do not think they already have, are, or will benefit from the Games
- Those that know less about what the Mayor is doing to ensure Londoners benefit from the Games

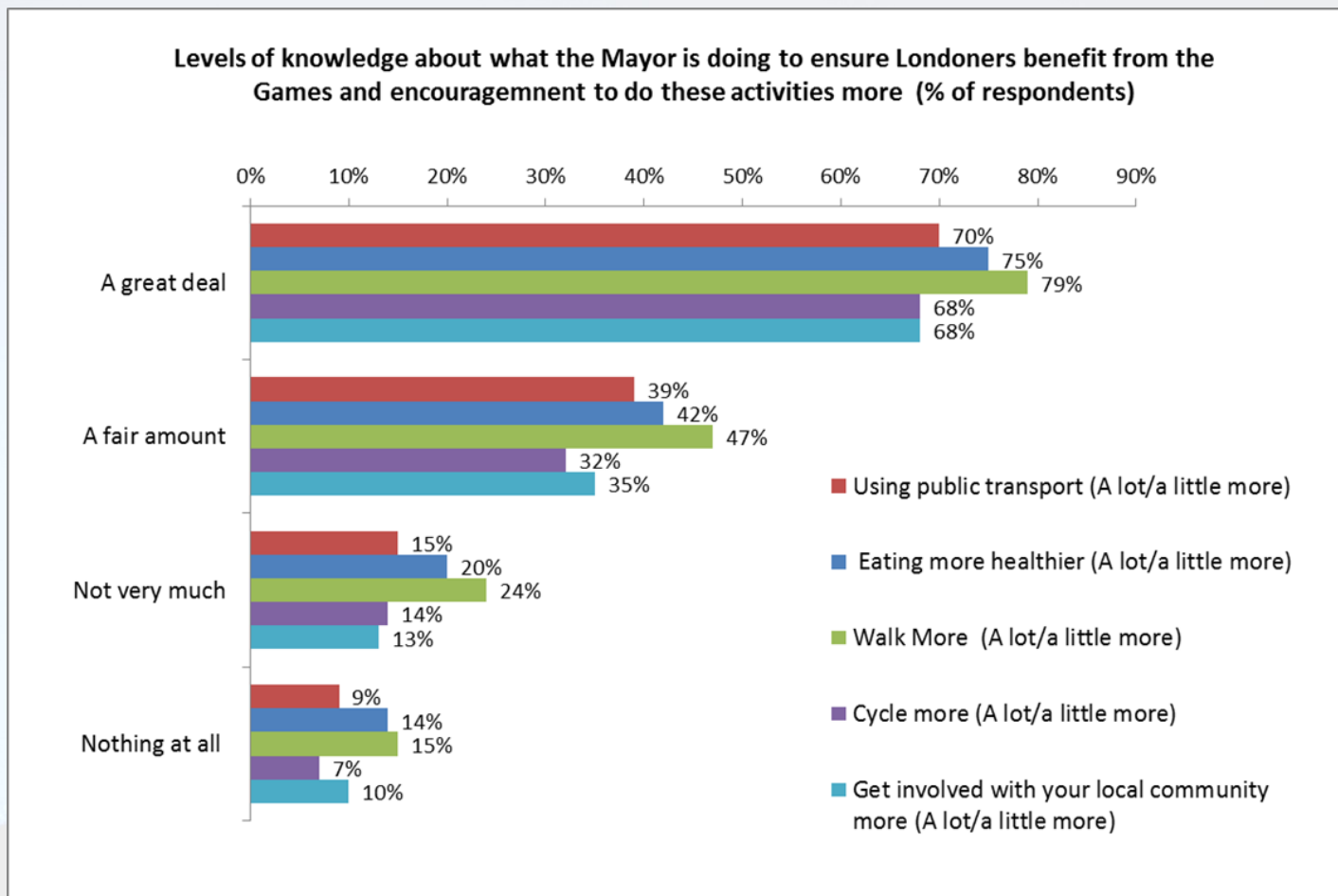
**Has seeing and hearing about the Volunteers that helped to deliver the Games, such as the Team London Ambassadors and the Gamesmakers, resulted in any of the following for you?
(% of respondents)**



Aim 12: To assess the impact of the Games on Londoners

There is a clear correlation between levels of knowledge about what the Mayor of London is doing to ensure Londoners benefit from the Games and these activities

- Those who know more about what the Mayor is doing to ensure Londoners benefit from the Games are more likely to think that the Games have encouraged them to do these activities more.
- For example 70% of those who know a great deal about what the Mayor is doing to ensure Londoners benefit say they are using public transport more compared to just 9% of those that know nothing at all about what the Mayor is doing to ensure Londoners benefit.



Aim 12: To assess the impact of the Games on Londoners

There is also a clear correlation between those that think they are benefitting from the Games and these activities

- Those who agree they are currently benefitting from the Games are more likely to think that the Games have encouraged them to do these activities more.
- For example 68% of those who agree they are currently benefitting say they are using public transport more compared to just 12% of those that disagree they are currently benefitting.
- A similar correlation can be found for those that have already benefitted and those that think they will benefit in the future.

Agreement/ disagreement that Londoners currently benefitting from the Games and encouragement to do these activities more (% of respondents)

