

London 2012 Monitoring

Online survey of Londoners
Pre Games - May 2012



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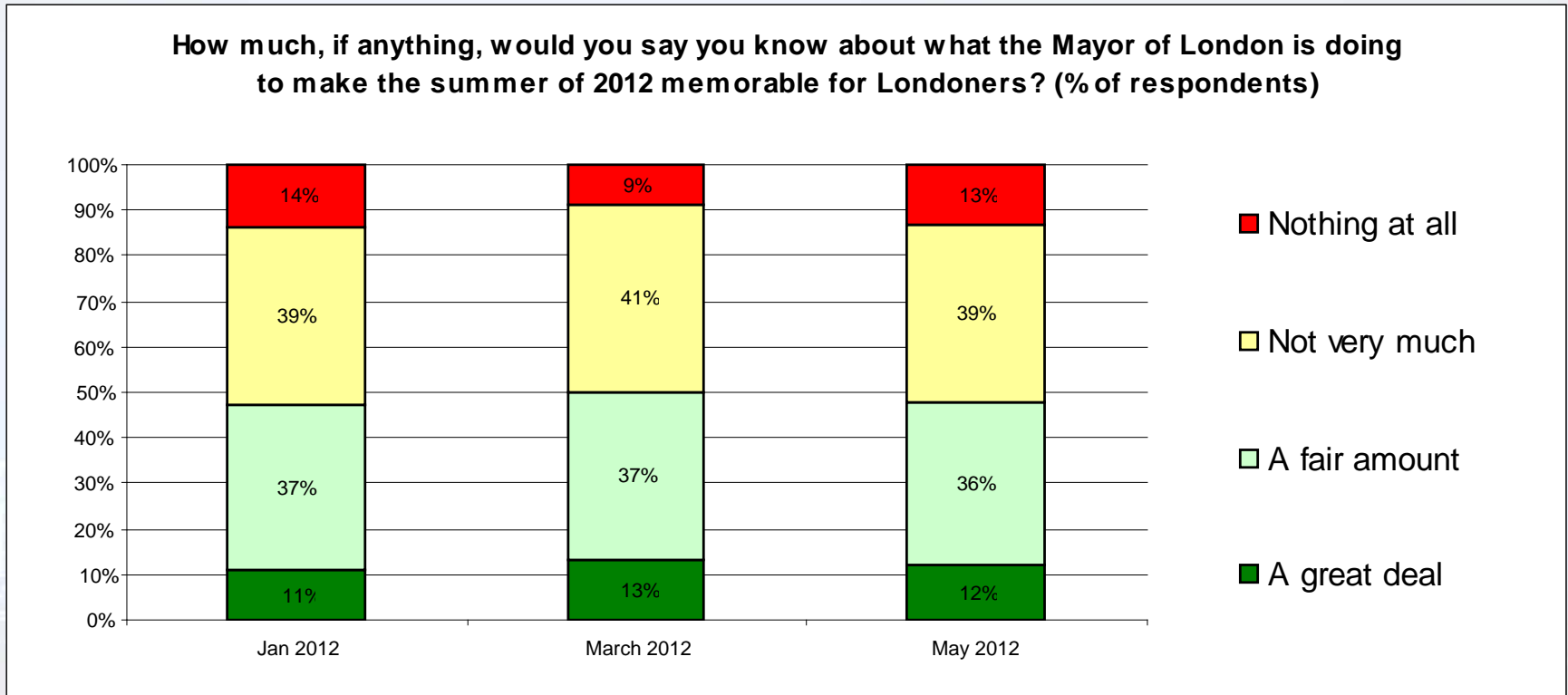
Background

- 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 first wave (pre Games) of online research conducted by TNS from 10th to 15th May 2012. A representative sample of 1018 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

87% of Londoners know something about what the Mayor is doing to make the summer of 2012 memorable for Londoners

- This 87% is made up of 12% who think they know a great deal, 36% who know a fair amount and 39% who know not very much. 13% state they know nothing at all.
- This level of Mayoral awareness has remained fairly consistent across 2012 so far.



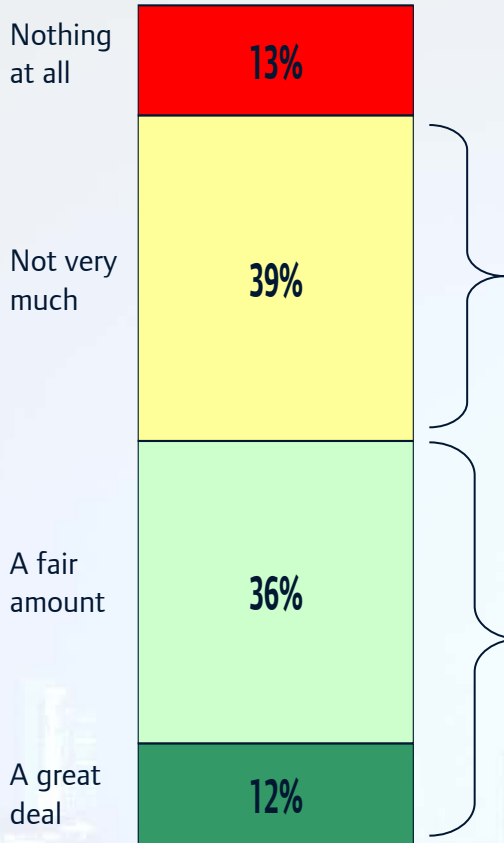
GLA/TNS – Free Sport 12th - 16th Jan 2012, 1045 Londoners 16+ yrs

GLA/TNS – Free Sport 15th - 20th March 2012, 1031 Londoners 16+ yrs

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

Aim 1: To assess awareness of Mayors contribution

Men, those aged 25-34, those with children at home and those working are more likely to know at least a fair amount



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)

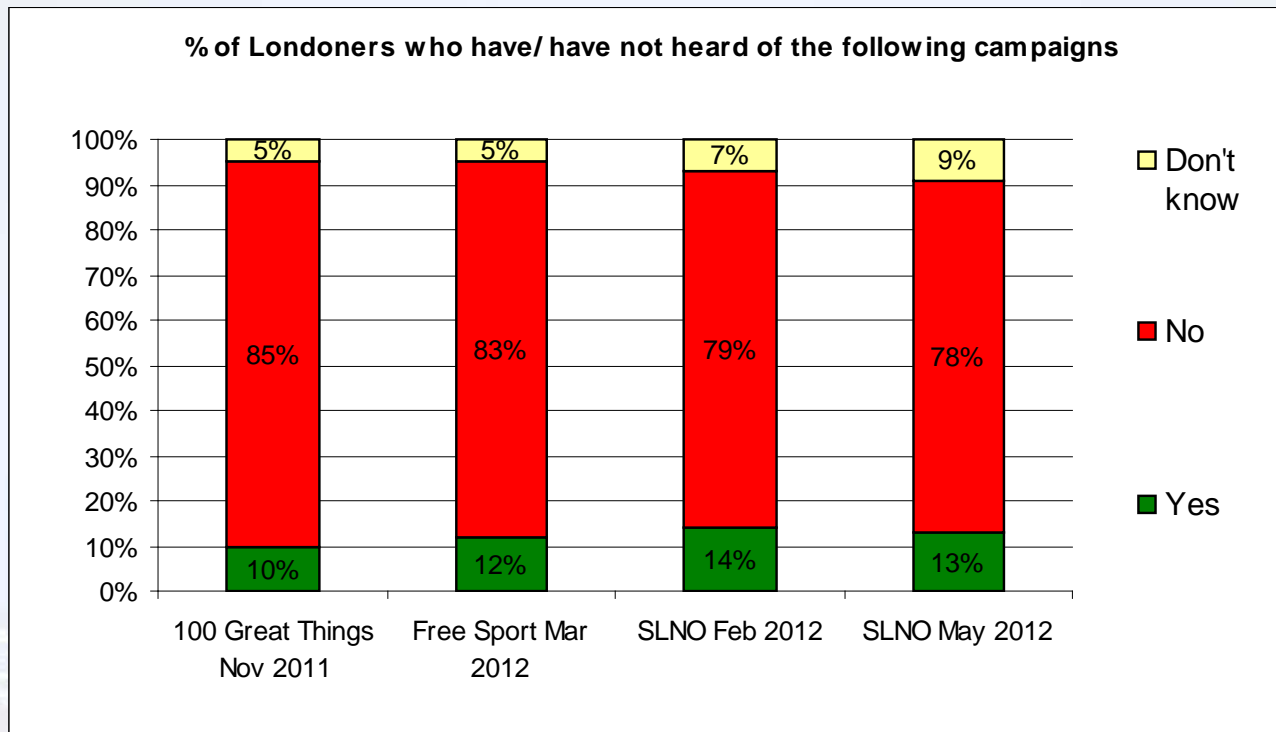
- Women are more likely to know not very much (41% compared to 36% of Males)
- 45-64 year olds are more likely to know not very much
- Parents without children in the household are more likely to know not very much as are those who are not working
- Those who have not heard of the SLNO campaign, not heard of the website, not seen the adverts

- Men are more likely than women to know at least a fair amount (51% of Males know a great deal/ a fair amount compared to 34% of women)
- 25-34 year olds are more likely to know at least a fair amount than all other age groups.
- Parents with children in the household are more likely to know at least a fair amount as are those who are working
- There is little difference between social classes
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts are more likely to know at least a fair amount

Aim 3: To assess awareness of marketing campaigns

Awareness of the Mayors Summer Like no other campaign remains fairly low at 13%

- 13% have heard of the Mayors summer like no other campaign, this is similar to levels in February 2012 (14%) and to previous campaigns – 100 Great things (November 2011) and Free Sport (March 2012).



Less likely to have heard of the campaign:

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

More likely to have heard of the campaign:

- Men
- 25-34 yrs olds
- Those with children in the household
- Those working

GLA/TNS – 100 Great Things 17th-22nd Nov 2011, 1020 Londoners 16+ yrs

GLA/TNS – Free Sport 15th-20th March 2012, 1031 Londoners 16+ yrs

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

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

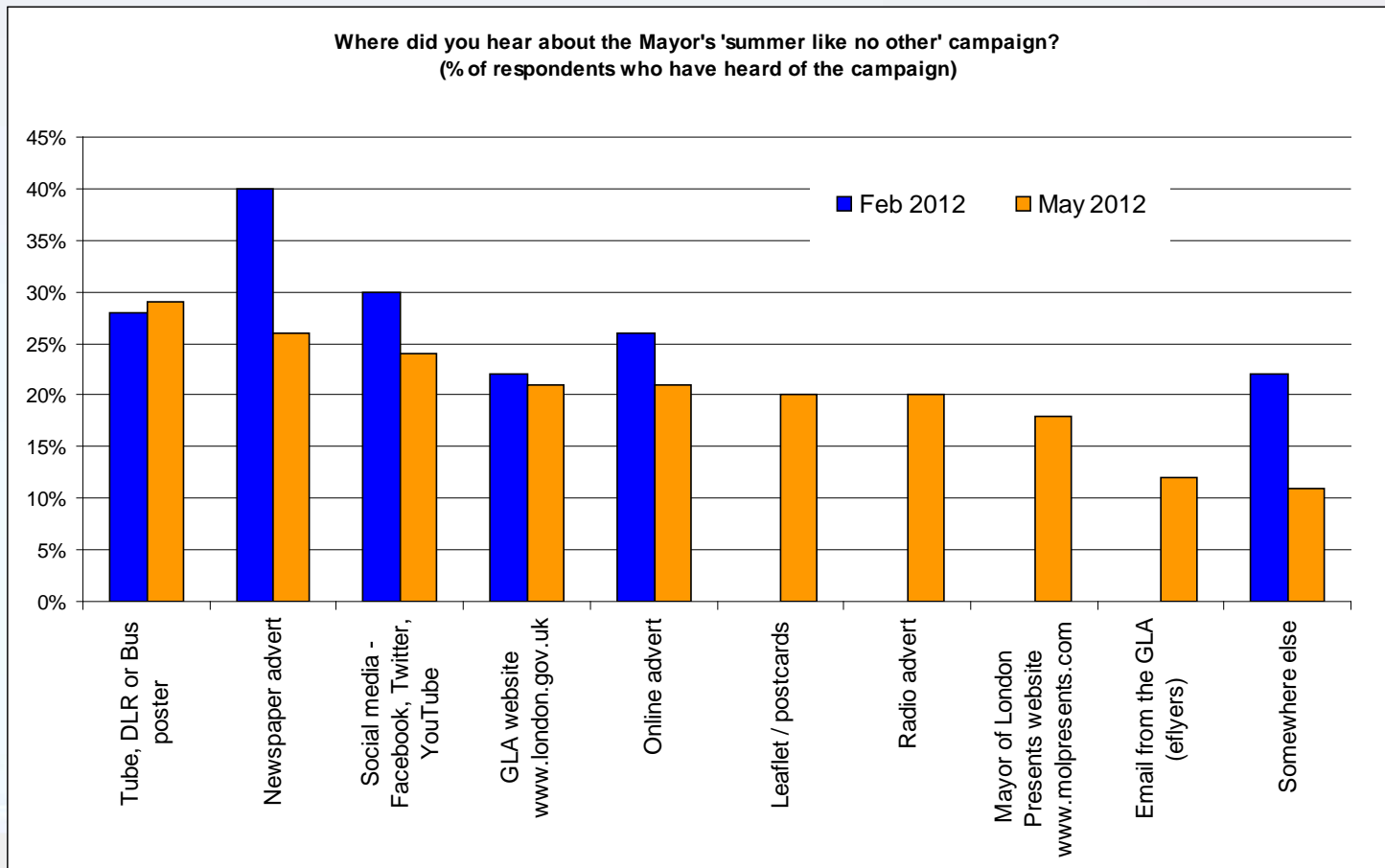
Aim 3: To assess awareness of marketing campaigns

Posters, newspaper adverts and social media are the most popular places for hearing about the campaign

- Of those that had heard of the campaign (131 respondents) 29% heard about it via tube, DLR or Bus poster

- Less people had heard of it through Newspaper adverts than in February 2012

- Note that this is based on a small sample size of 131 respondents and therefore results should be treated with caution.



Aim 3: To assess awareness of marketing campaigns

On average 11% of Londoners have seen the adverts, this equates to 704,004 people*

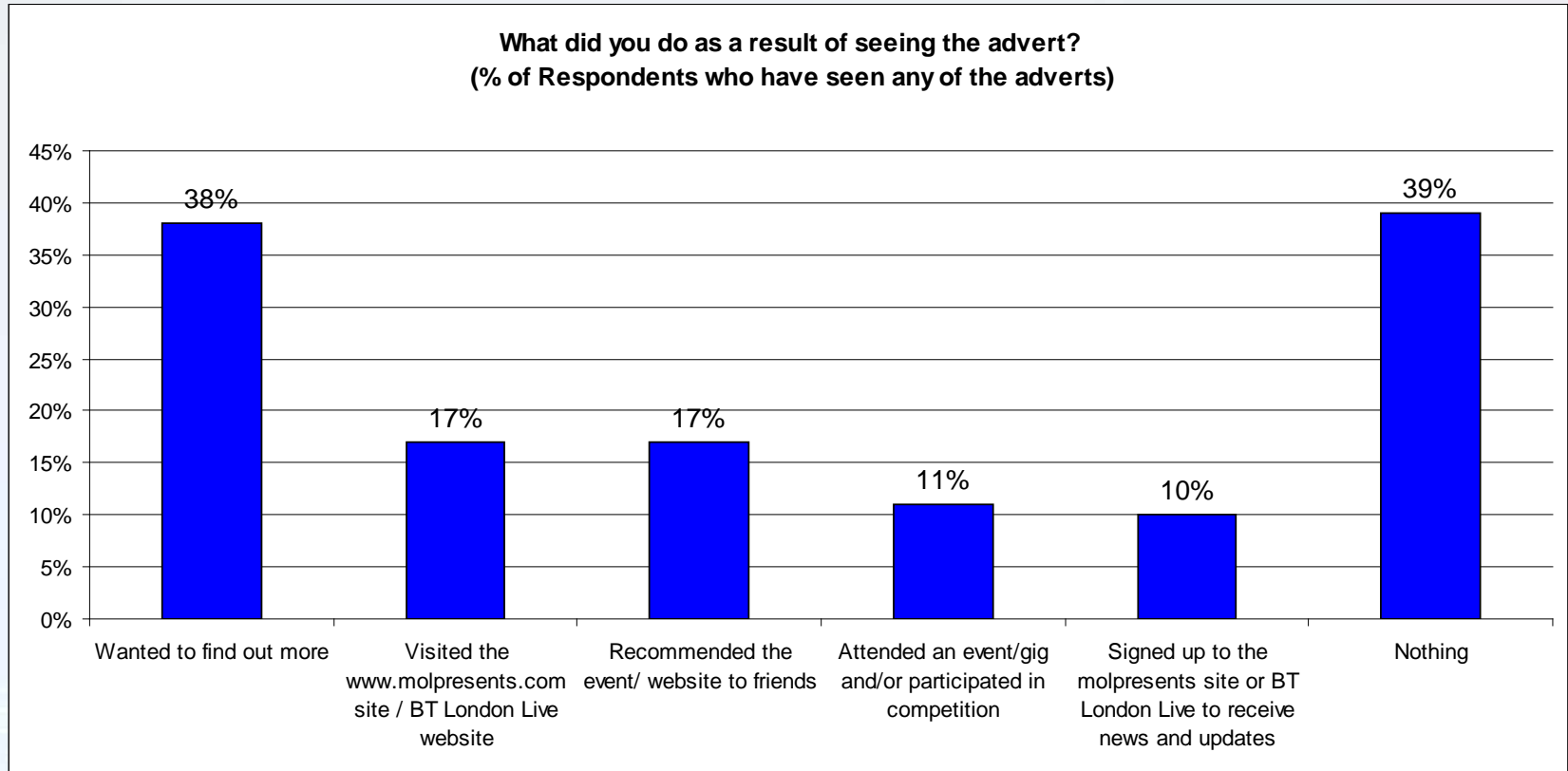
Have you seen any of these adverts before today?	BT London Live	Gigs	St Georges Day
Yes	13%	11%	10%
No	81%	85%	85%
Don't know	6 %	5%	4%



* 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 4: To evaluate the impact of marketing and comms

**Of those that had seen any of the adverts (211 respondents)
38% wanted to find out more while 39% did nothing**



- Those who wanted to find out more are more likely to be 25-34 yrs old, parents with children at home, those working and those in lower socio-economic groups (C2DE). Note that this is based on a small sample size of 80 respondents who wanted to find out more and therefore results should be treated with caution.

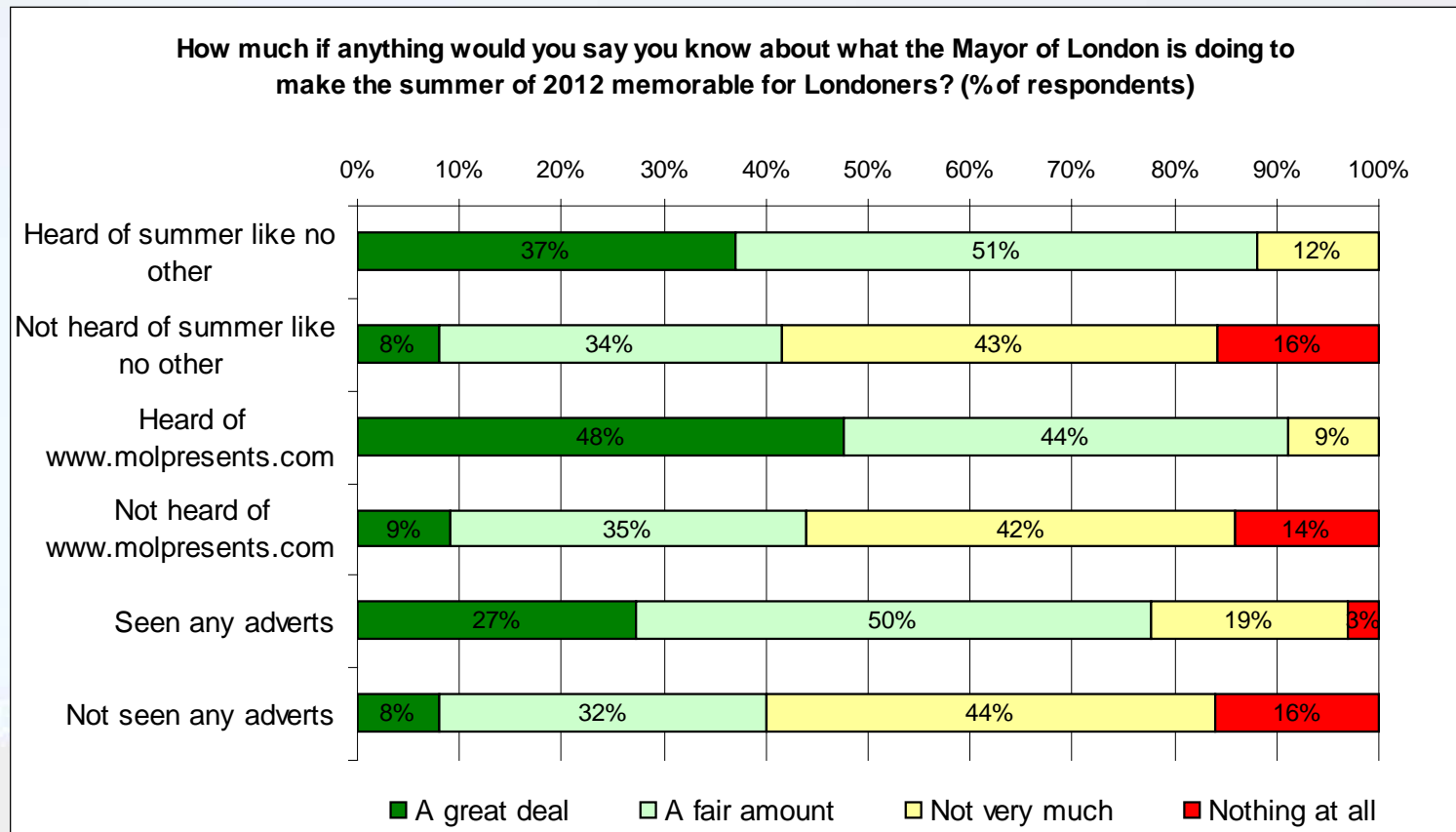
Aim 4: To evaluate the impact of marketing and comms

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 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 (131), website (76) or seen any adverts (211) so results should be treated with caution

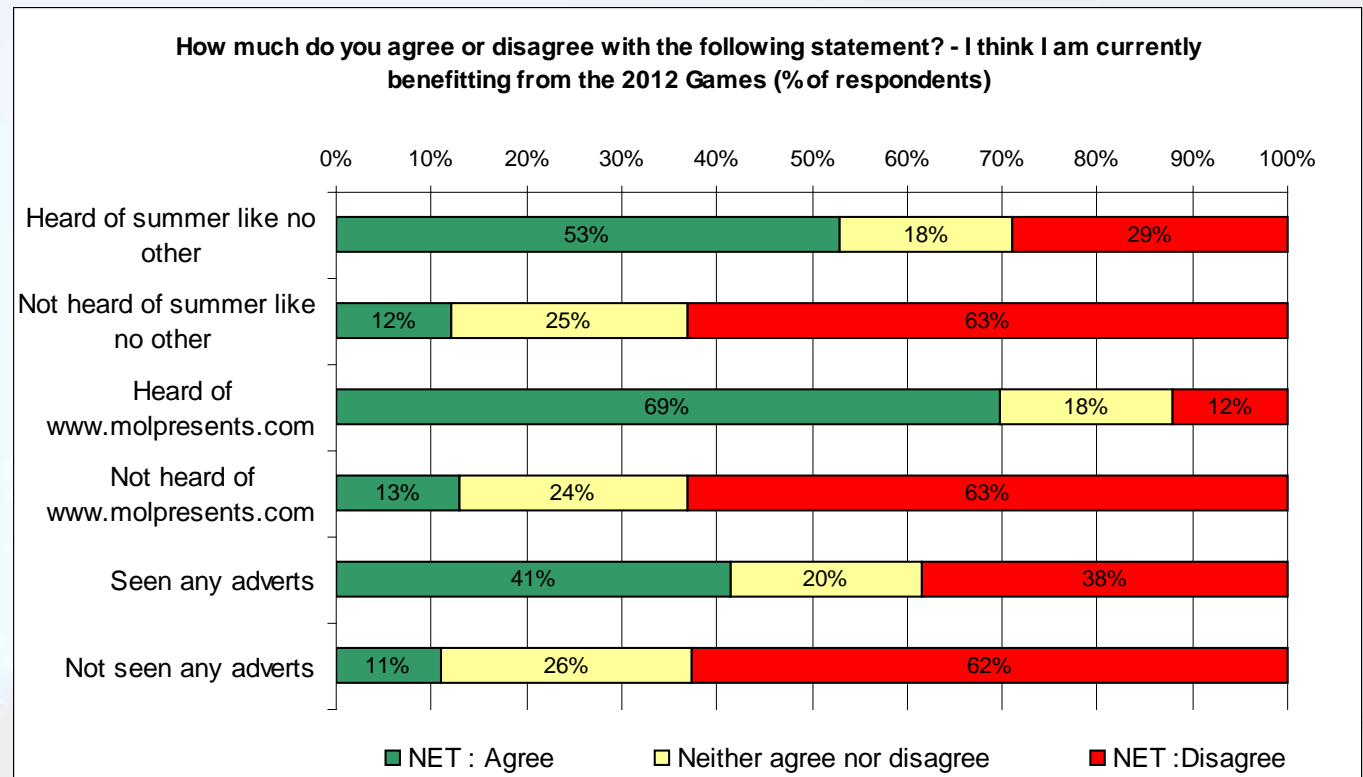


There also appears to be a correlation between knowledge of the marketing campaigns and perception of the benefits of the Games

- 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 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

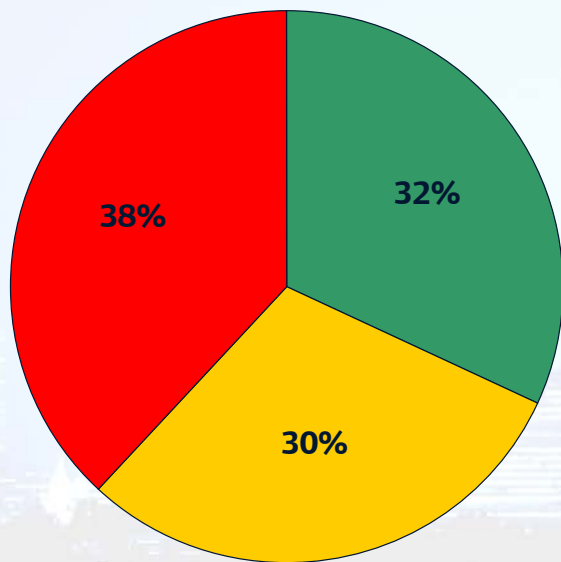
Please note the small sample sizes for those who have heard of the campaign (131), website (76) or seen any adverts (211) so results should be treated with caution



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

Over a third of Londoners (35%) plan to attend more events this summer than last summer

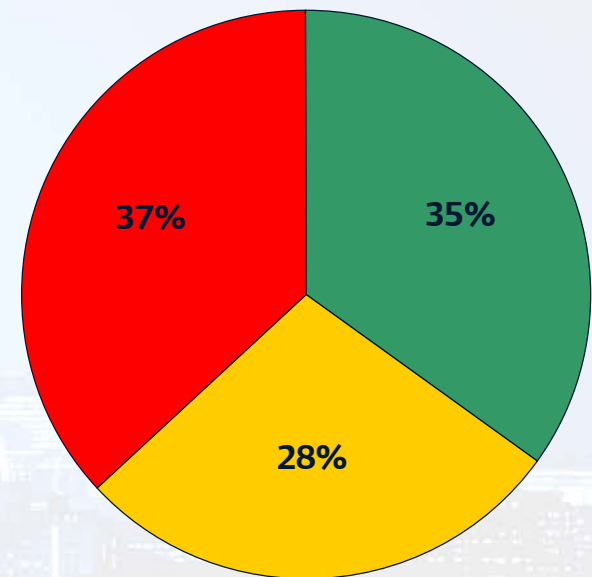
- Almost a third (32%) of Londoners are planning to attend some of the events and cultural happenings put on or supported by the Mayor.
- However over a third (38%) are not planning on doing so.



% of respondents

- NET: Agree
- Neither agree nor disagree
- NET: Disagree

- Similar numbers (35%) think that they will attend more events and cultural happenings during this summer than last summer. While 37% don't think that they will.



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

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 Londoners more likely to agree that they are planning to attend some of the events and cultural happenings put on or supported by the Mayor are:

- Men
- 25-34 year olds
- Parents with children at home
- Those working
- 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

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

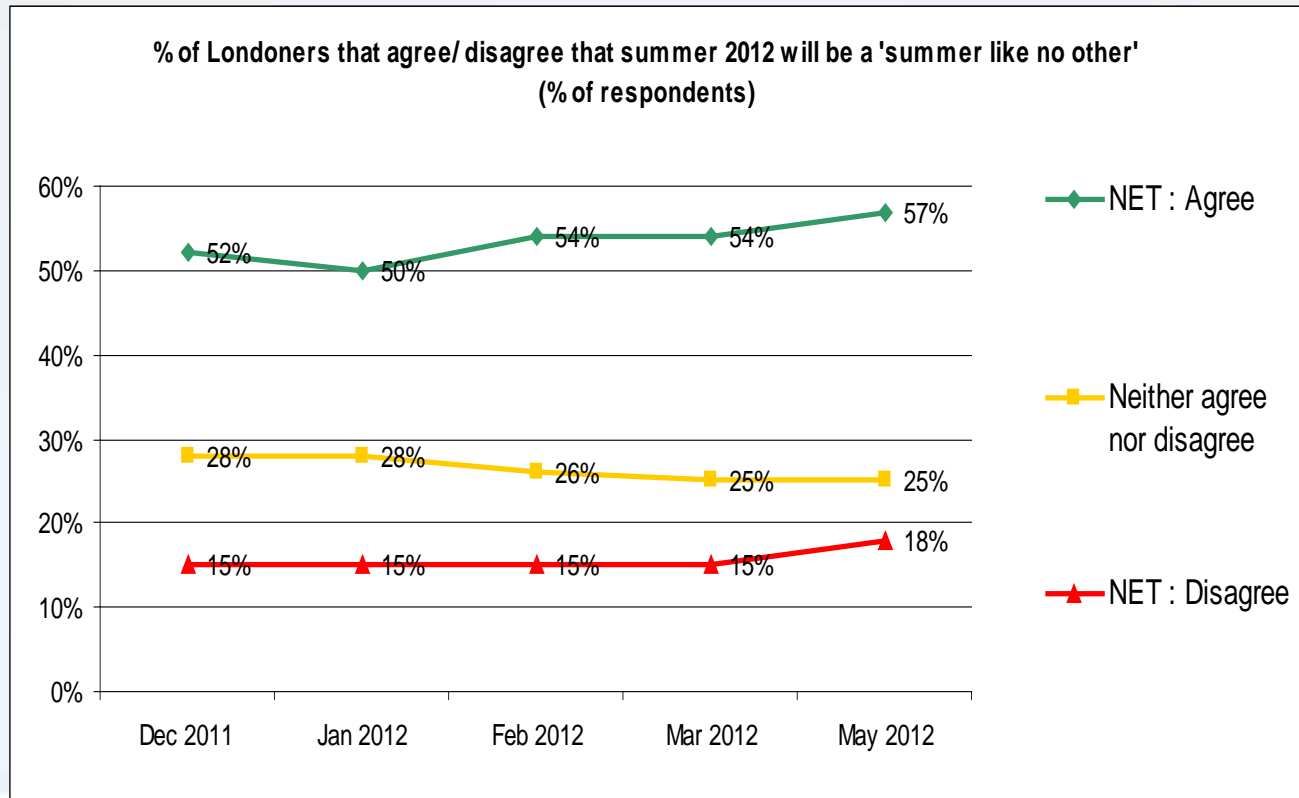
Those Londoners most likely to disagree that they are planning to attend some of the events and cultural happenings put on or supported by the Mayor are:

- 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

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

57% of Londoners think that summer 2012 will be a 'summer like no other' this is a 5% increase since December 2011



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

- Men
- 25-44 yrs olds
- Parents with children at home
- 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

TNS/GLA London Bus

15 - 20 Dec 2011, 1016 London adults 16+ yrs, 12-16 Jan 2012, 1045 London adults 16+ yrs

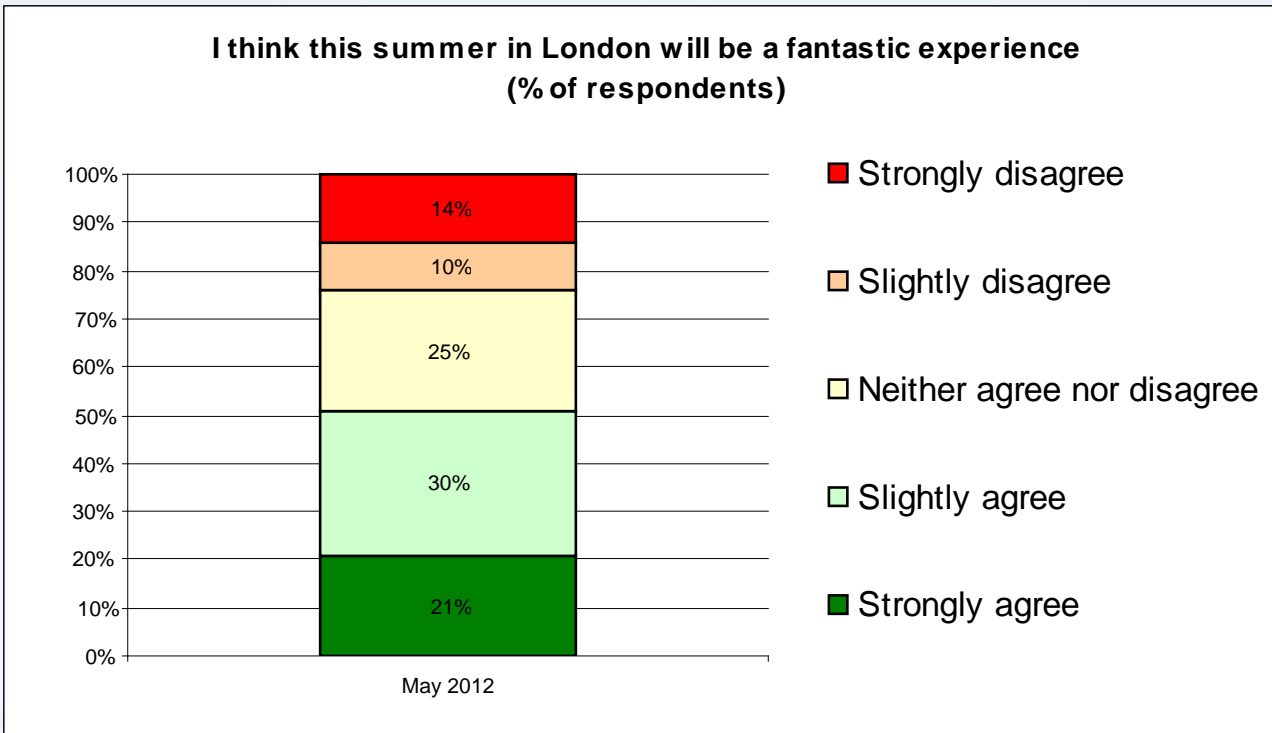
9 -13 Feb 2012, 1007 London adults 16+ yrs, 15-20 March 2012, 1031 London adults 16+ yrs

10 -15 May 2012, 1018 London adults 16+ yrs

GLA INTELLIGENCE UNIT

Aim 8: To assess the sentiment of Londoners

51% of Londoners think that summer 2012 will be a 'fantastic experience'



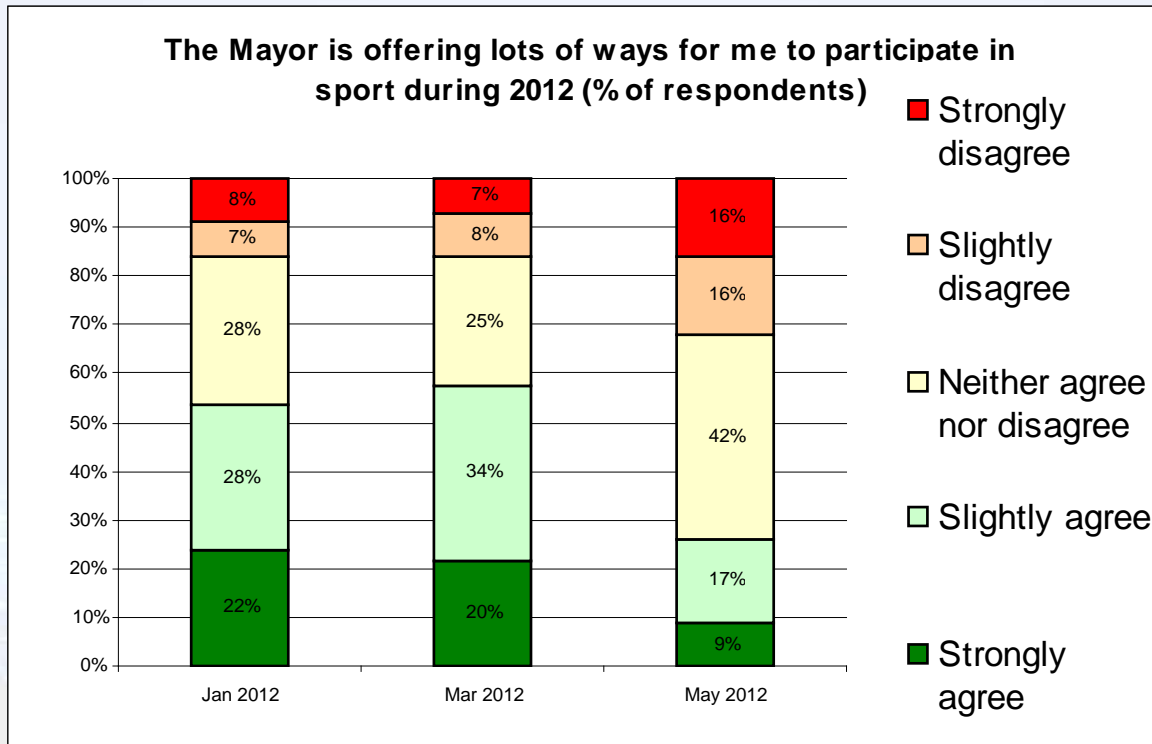
Those more likely to agree it will be a fantastic experience:

- Men
- 16-44 yrs olds
- Those with children in the household
- Those working
- 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

Aim 8: To assess the sentiment of Londoners

26% of Londoners agree that the Mayor is offering lots of ways for them to participate in sports

- From March to May there has been a fall (from 54% to 26%) in the number of Londoners who agree that the Mayor is offering lots of ways for them to participate in sports. This may be 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.



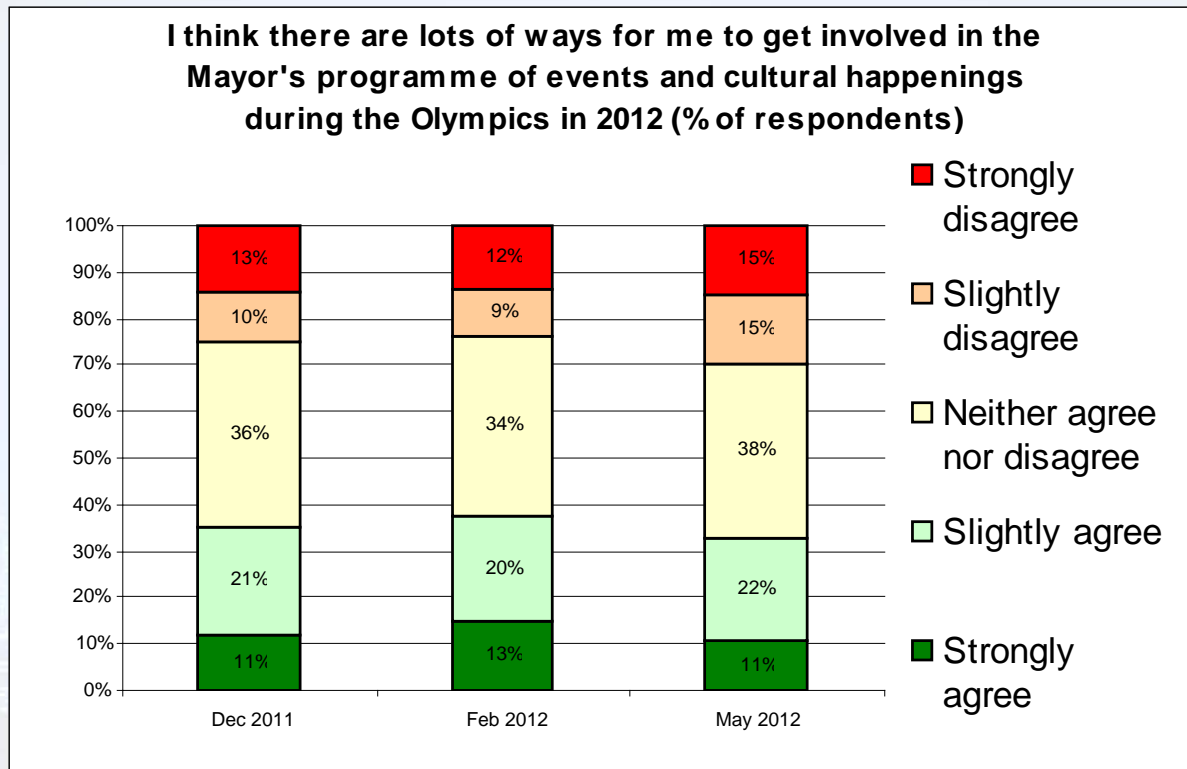
More likely to agree

- Men
- 25-34 yr olds
- Those with children in the household
- Those working
- 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

Aim 8: To assess the sentiment of Londoners

Londoner's views on getting involved in the programme of events and cultural happenings during the Olympics are split

- 33% 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 30% feel this is not the case.



Likely to agree

- Men
- 25-44 yr olds
- those with children in the household
- Those working
- 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

GLA/TNS – SLNO 15th - 20th Dec 2011, 1016 Londoners 16+ yrs

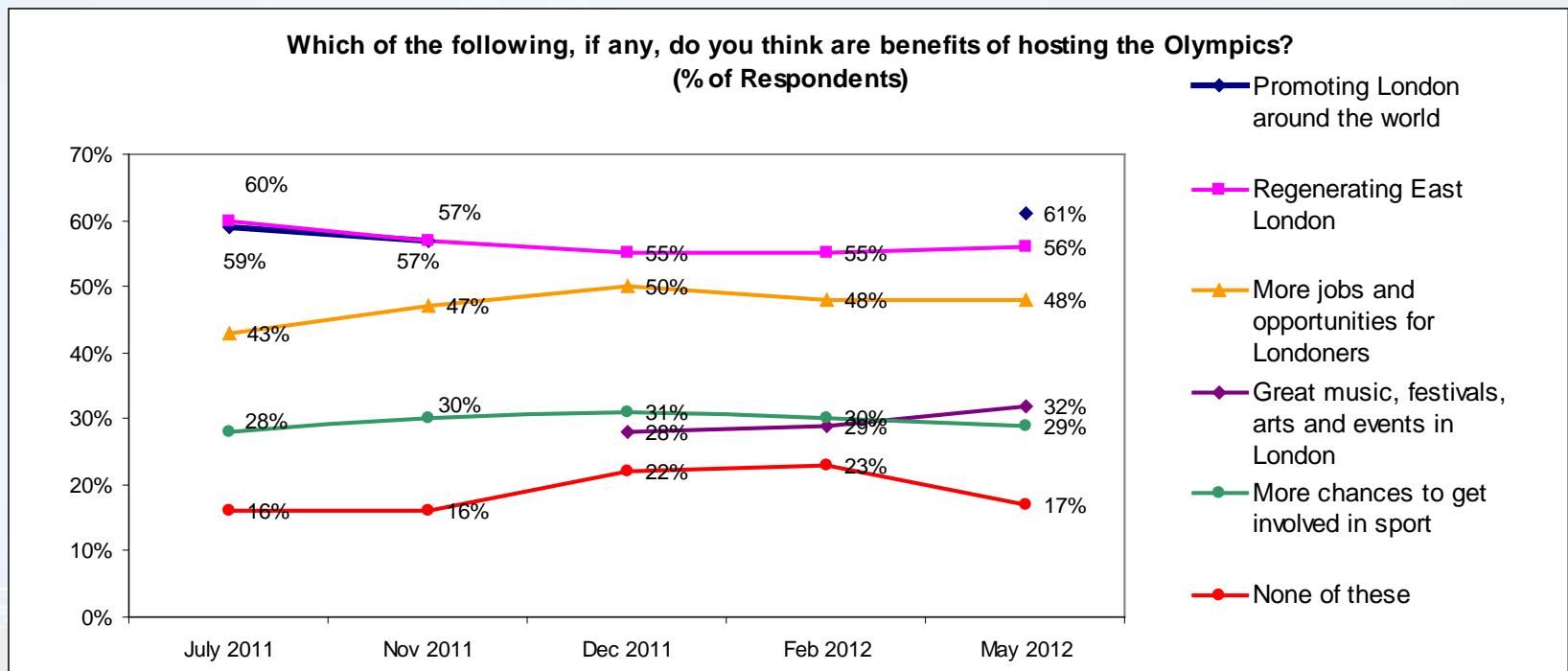
GLA/TNS – SLNO 9th - 13th Feb 2012, 1007 Londoners 16+ yrs

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

Aim 9 : To track perception of benefits

Promoting London around the world is the most recognised benefit of the Olympics (61%).

- Promoting London around the world is the most recognised benefit of the Olympics (61%). This is followed by Regenerating East London (56%) and more jobs and opportunities for Londoners (48%).
- More chances to get involved in sport is the least recognised benefit (29%)
- Since December 2011 there has been a slight increase (5%) in people recognising jobs and more opportunities for Londoners as a benefit of the Games



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+ yrs

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 (61%):

- Men
- 16-54 year olds
- Higher social grades (ABC1)
- Those who have seen any of the adverts

Regenerating East London (56%) :

- 45+ year olds
- Higher social grades (ABC1)

More jobs and opportunities for Londoners (48%):

- 16-24 year olds
- Those not working

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

- 16-34 year olds
- Those who have heard of summer like no other campaign
- Those who have seen any adverts

More chances to get involved in sport (29%):

- 25-34 year olds
- Parents with children at home
- Those who have heard of the summer like no other campaign
- Those who have seen any adverts

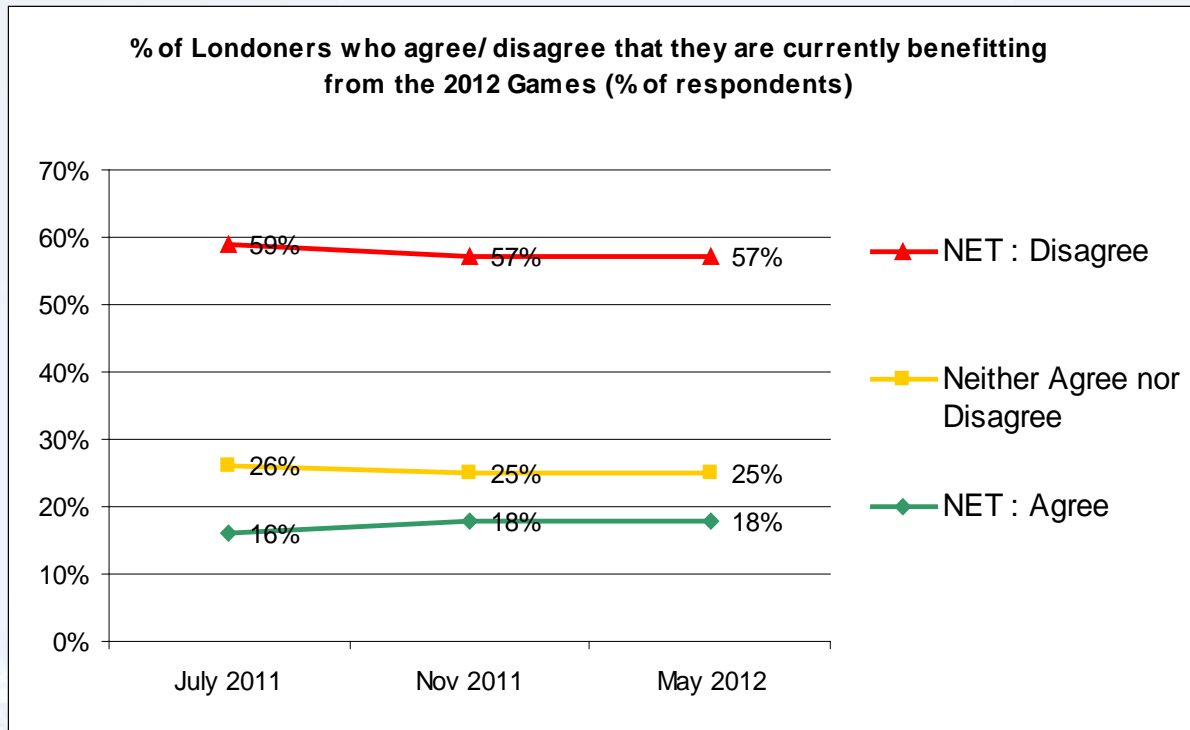
None of these (17%):

- 55+ year olds
- Without children at home
- Those not working
- Those who have not heard of the summer like no other campaign
- Those who have not seen any of the adverts

Aim 9 : To track perception of benefits

18% of Londoners agree that they are currently benefiting from the Games

- In July last year only 16% of Londoners felt they were benefitting from the Games this has risen very slightly as we approach the Games to 18%.



More likely to agree

- Men
- 16-44 yr olds
- Those with children in the household
- Those working
- Lower social grades (C2DE)
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts

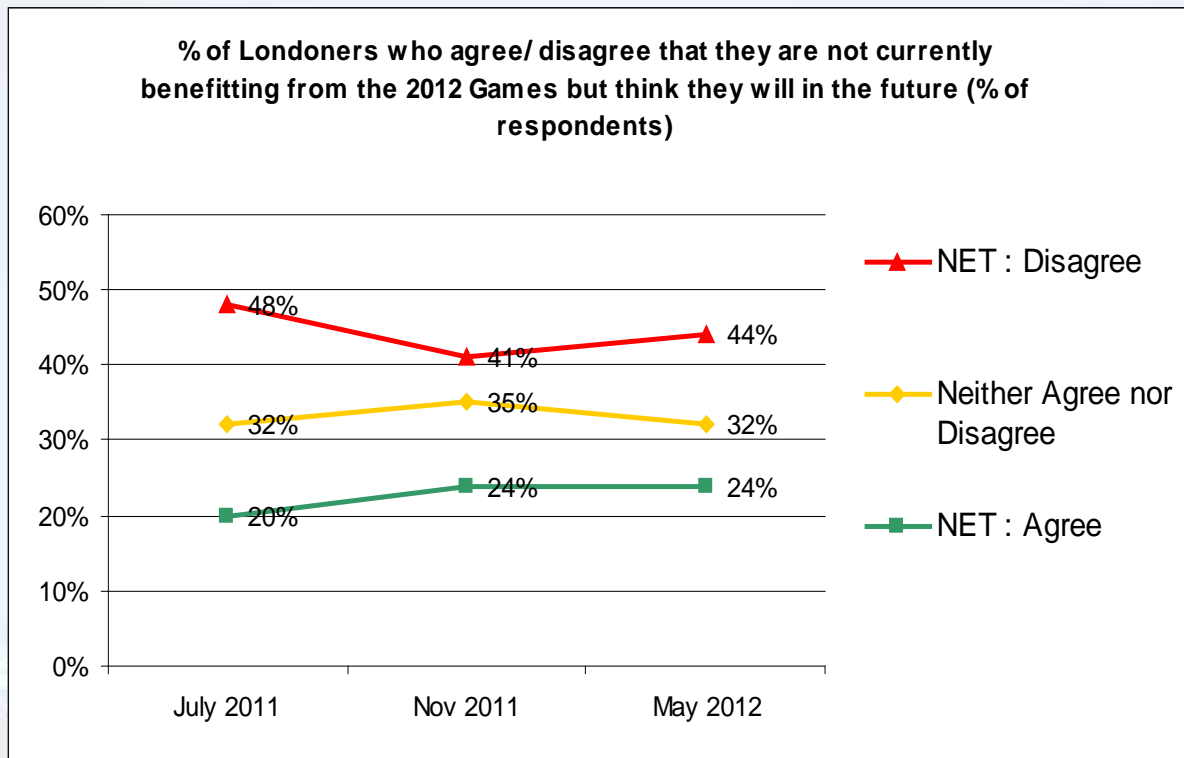
More likely to disagree

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

Aim 9 : To track perception of benefits

Just under a quarter (24%) feel that they will benefit from the Games in the future

- 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
- Lower social grades (C2DE)
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts

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.

TNS/GLA London Bus 14 – 18 July 2011, 1014 London adults aged 16+ yrs

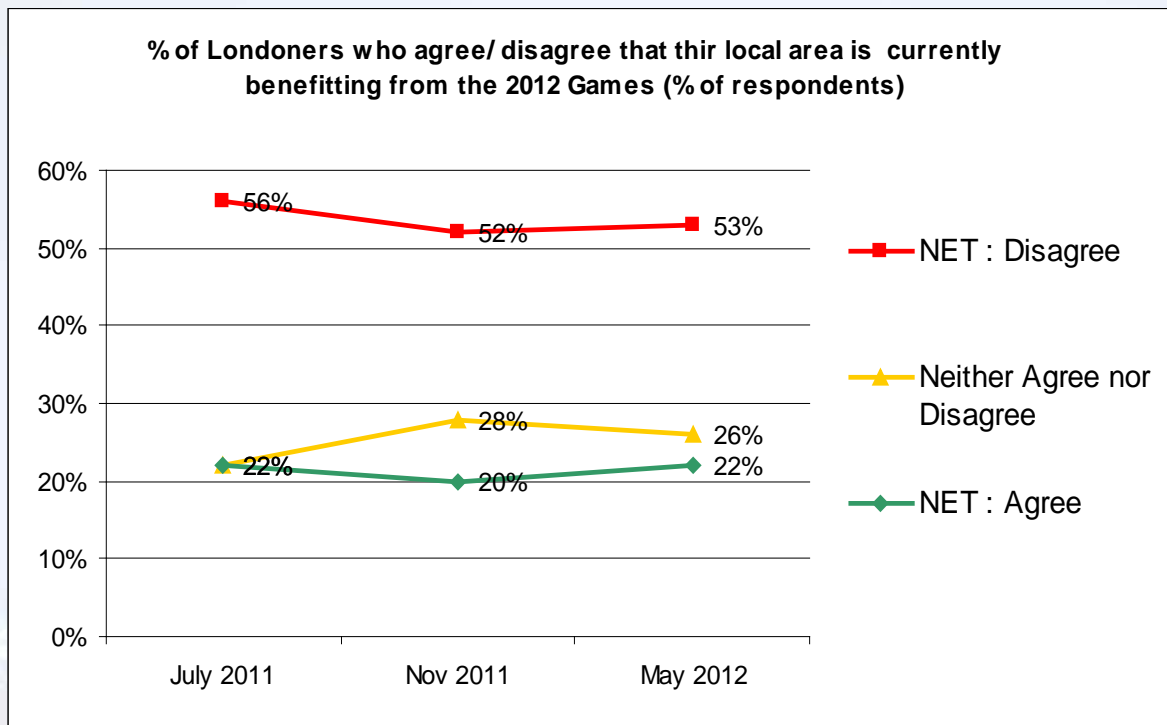
TNS/GLA London Bus 17 – 22 Nov 2011, 1020 London adults aged 16+ yrs

TNS/GLA London Bus 10th-15th May 2012, 1018 London adults 16+ yrs

Aim 9 : To track perception of benefits

22% of Londoners feel their local area is currently benefitting from the Games.

- People who live in the city of London and the host boroughs are more likely to think that their local area is currently benefitting. 53% of Londoners feel their local area is not currently benefitting.



More likely to agree

- Men
- 25-34 yr olds
- Those with children in the household
- Those working
- Lower social grades (C2DE)
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts

More likely to disagree

- Women
- 45 + year olds
- Those without children at home
- Those not working
- Higher social grade (ABC1)
- Those who have not heard of the SLNO campaign, not heard of the website, not seen the adverts.

TNS/GLA London Bus 14 – 18 July 2011, 1014 London adults aged 16+ yrs

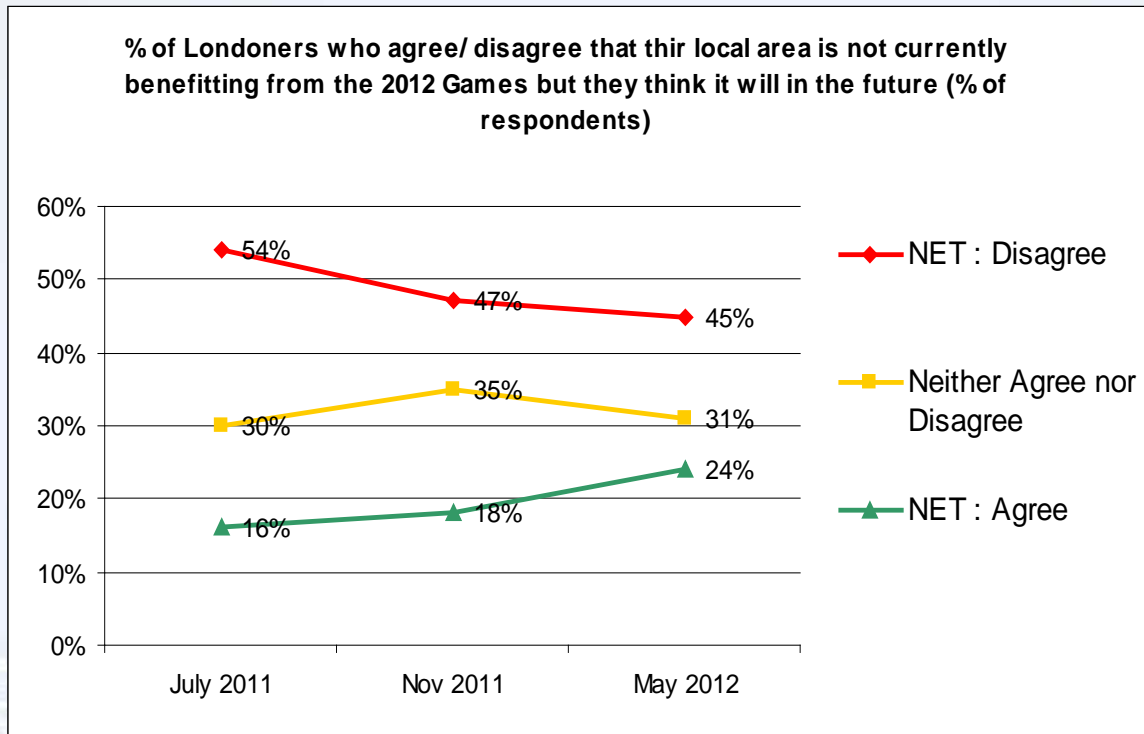
TNS/GLA London Bus 17 – 22 Nov 2011, 1020 London adults aged 16+ yrs

TNS/GLA London Bus 10th-15th May 2012, 1018 London adults 16+ yrs

Aim 9 : To track perception of benefits

Since July 2011 There has been a 8% increase in those that think their local area will benefit in the future

- Currently just under a quarter (24%) think their local area will benefit in the future. This is a 9% increase from July last year.



More likely to agree

- Men
- 25-34 yr olds
- Those with children in the household
- Those working
- Lower social grades (C2DE)
- Those who have heard of the SLNO campaign, heard of the website or seen the adverts

More likely to disagree

- Women
- 45 + year olds
- Higher social grade (ABC1)
- Those who have not heard of the SLNO campaign, not heard of the website, not seen the adverts.

Aim 11: To ensure everyone is well informed

7% of Londoners had heard of the mol presents website, this is 1% more than in February 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 7% equates to 448,028 Londoners
- Of the 76 respondents that had heard of the website, 33% (25 people) had done so through the GLA website, 31% (24 people) through Tube, DLR or Bus poster and 29% (22 people) through an online advert.
- Note that this is based on a small sample size of 76 respondents and therefore results should be treated with caution.

