



Perceptions of London

A social media analysis examining the impact of the London 2012 Olympic and Paralympic Games on perceptions of London as a place to live, work and visit.

Jeremy / April 2013 / final

Contents

i > Introduction

m > Method

1 > What do people think about London?

2 > Have perceptions of London changed?

3 > Conclusions

i > Introduction

The aims, scope and context of this report

i.1

Introduction

The Mayor of London has been committed to delivering a successful Games and securing a viable and sustainable legacy as part of the economic, social and environmental change in London, and east London in particular, over the next 25 years.

London's bid for the 2012 Games was based on an overall vision endorsed by the Olympic Board "to host an inspirational, safe and inclusive Olympic and Paralympic Games and leave a sustainable legacy for London and the UK", including showcasing London - maximising the opportunities to showcase London to the world as a place to live, visit, work, learn and invest.

The GLA is now evaluating the impact and legacy of the 2012 Games and the GLA's City Operations programme which aimed to extend an inspirational Games experience across London, ensuring that everyone is safe, well informed and involved, as well as showcasing London domestically and globally.

i.2

Evaluation

A key component of this evaluation is to explore the impact that the Games had on people's perceptions of London.

All of the research undertaken to date has been delivered via traditional research methods, including online quantitative surveys of a representative sample of Londoners, and in-field interviews with attendees at 2012 events.

This study looks to add a different perspective to this research by analysing people's comments and discussions on social media. Exploring social media conversations provides a more natural and much broader understanding of people's feelings about London. It also spanned a longer time frame than the other research, analysing conversations over a period of months before and after the Games.

i.3

Project aims

In order to help the GLA evaluate the impact and legacy of the 2012 Olympic and Paralympic Games this project set out to:

- Identify comments made across a wide range of social media (e.g. blogs, forums, tweets etc.) regarding people's perceptions of London.
- Assess these comments to understand how people talk about London and what they say.
- Compare randomised data from the three months before and three months after the Games to observe differences in overall perceptions.
- Develop a broader understanding of people's feelings about London as a place to Live, Work and Visit.

Our overall aim was to see if there was any change in the way that people talked about London before and after the Games, which might indicate the impact of the Games on these perceptions.

m > Method

Social Media Research

m.1

Method: overview

This study employed Social Media Research techniques as these could provide a different perspective from traditional forms of research. Social Media Research:

- Aims to deduce theories that explain behaviour by **looking solely at what is contained with the data itself**. This differs from the 'create hypothesis, collect data to test' approach common in other forms of Market Research.
- When applied to large amounts of social media data this technique enables the research to **identify patterns of behaviour across a wide variety of people** and experiences.
- This approach uses **data that has been created by people in a natural context** (i.e. outside of a constructed research setting) and so the content does not follow the rigid structure that you find in other methodologies. In research terms, the data is all 'open' and unstructured.

m.2

Method: approach

The findings in this report are based on a large scale qualitative analysis of comments made by different people across social media regarding London as a place to Live, Work or Visit. Our approach included the following stages:

Stage 1

Finding relevant comments

Using a social media monitoring service we scanned over 80 million public websites (including forums, blogs, twitter etc.) looking for content that combined mentions of:

- Living, Working or Visiting, and
- Personal references (such as I, you, we), and
- London (including areas of London e.g. postcodes, slang, village names etc.).

This allowed us to identify natural conversations taking place on social media that spoke to a person's perceptions of London. From this, we obtained a random sample of 14,000 comments, split evenly between the period before (Apr-Jun) and after the Games (mid Sep-Dec 2012).

This allowed us to examine the impact of the Games *indirectly* to see if there was a broader emotional or perceptual impact.

m.3

Method: data sources

We identified and collected individual comments from a wide range of social media sources. The final analysis is based on relevant data collected from over 450 different sources, including:

Twitter, Tripadvisor, thestudentroom, answers.yahoo, moneysavingexpert, yelp, pistonheads, housepricecrash, mumsnet, overclockers, toontastic, pistonheads, track-days, livefight, qype, reddit, urban75, eastdulwichforum, nappyvalleynet, recoveryourlife, community.tes, runnersworld, bikeradar, allinlondon, olympicbusinesspages, footballforums, horseandhound, londoncyclist, eurogamer, netmums, ukbusinessforums, travel.ciao, london-se1, amywinehouseforum, thedibb, rspb, lonelyplanet, clinpsy, consumeractiongroup, cemexangling, streetdancers, sagazone, fmuk, attraction-tickets-direct, starting-out-London, mk5golfgti, thefightingcock, p2s-prepared2survive, abrsm, doverforum, spotlight-forums, forum.towerstimes.co.uk, yacf, thefootballramble, hitched, uk-preppers, huffingtonpost, wearetherangersboys, forums.pubsgalore, thisishullandeastriding, globalteam, blogspot, forums.m3cutters, periodproperty, pointblog, kingdomofstyle.typepad, golfgtiforum, londondrum, nomorepanic, railforums, thanetroadrunners, chiswickforums, muscletalk, stargazerslounge, forum.carersuk, practicenursing

m.4

Method: approach (cont.)

Stage 2

Data processing

The information gathered by computer-based social media monitoring tools is good but tends to contain a lot of false-positive results i.e. data that meets the search terms, but that isn't relevant to the research question. In the case of London, people often mention it just as a locational marker (e.g. *"I drive a Golf and I live in London"*), rather than as part of the context of what's being said (e.g. *"There's no point having a car, because I live in London"*).

In the second stage of the project we read and assessed each comment to find pertinent information, remove any irrelevant data and began the process of interpreting the results. We removed any duplicates and ensured that each comment was from a different individual.

Comments were deemed relevant and included in the analysis if they mentioned Living, Working or Visiting London.

This resulted in a total sample of 3,098 comments, 1,549 relevant comments for each period.

m.5

Method: approach (cont.)

Stage 3

Analysis & reporting

We applied Grounded Theory techniques as the analytical framework for interpreting the results and drawing conclusions from the data.

Grounded Theory involves the systematic discovery of theory through the analysis of data. As opposed to other forms of research, a Grounded Theory study starts with the collection of data which is then systematically coded and then categorised through an iterative process with the hypothesis emerging through the process of analysis.

Underpinning this approach we used Discourse Analysis techniques to help interpret the comments in a structured and thorough manner. Discourse analysis provides a series of tools and techniques to help the researcher understand and interpret how humans make meaning and communicate across different groups.

These techniques allowed us to examine each comment and draw conclusions from the body of comments about people's perceptions of London in a consistent and thorough way.

Method: Notes on interpretation

m.6

Social Media Research is a relatively new discipline and while the techniques used to interpret it are well established, it has some characteristics that should be taken into account when thinking about any conclusions.

Like most research techniques, Social Media Research is based on taking data from a sample of the population. While traditional market research samples people who sign-up to take part, Social Media Research observes the comments that people make public. As all insight is derived from the comment itself we know nothing else about the individual who made the comment. Consequently it is not possible to apply traditional segmentation techniques to the data based on demographics. However it is possible to segment those that live in London from visitors by the nature of their comments.

The reader of this report should take into account that the findings are based on the analysis of large scale qualitative data that has been created using social media. This is not necessarily reflective of the national population and as such the results should be interpreted as indicative rather than representative.

One final consideration is that, as with all projects of this nature, it is difficult to completely remove the potential influence of other variables (i.e. on perceptions of London). All care was taken to compare 'like for like' between the two data sets so that conclusions were based on a comparison of the same variables.

1 > What do people think about London?

Perceptions of London: sentiment, emotions and interests

1.1

Introduction

When looking at how people perceive London, there is a wide range of experiences, emotions and opinions about what it's like as a place to Live, Work or Visit. From this, a number of common themes emerged which help define what perceptions are made of.

This part of the report explores these themes looking at the complete data set (data from pre- and post-Games combined) to see what people think of London overall. This then introduces the framework for comparing perceptions before and after the Games.

INTEREST



What are the main topics of conversation for people when talking about Living, Working or Visiting London.

SENTIMENT



What are people's overall feeling towards London?

EMOTION



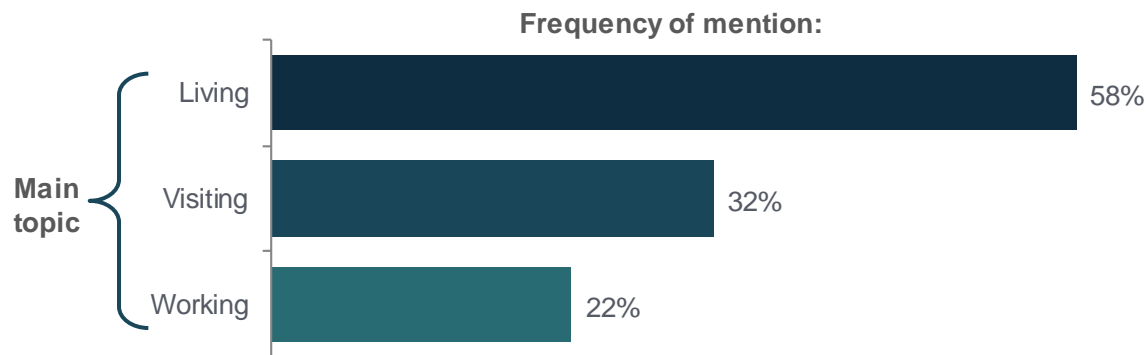
What is the main emotional response felt by people experiencing or anticipating London.

1.2

What do people talk about?

This study deliberately sought to identify and interpret comments which spoke to an individual's perceptions of London as a place to Live, Work or Visit.

As such each comment contained a reference to one or more of these main topics . The relative frequency of mentions for each of these is shown below*:



Within these broad topics, people expressed their perceptions of London either:

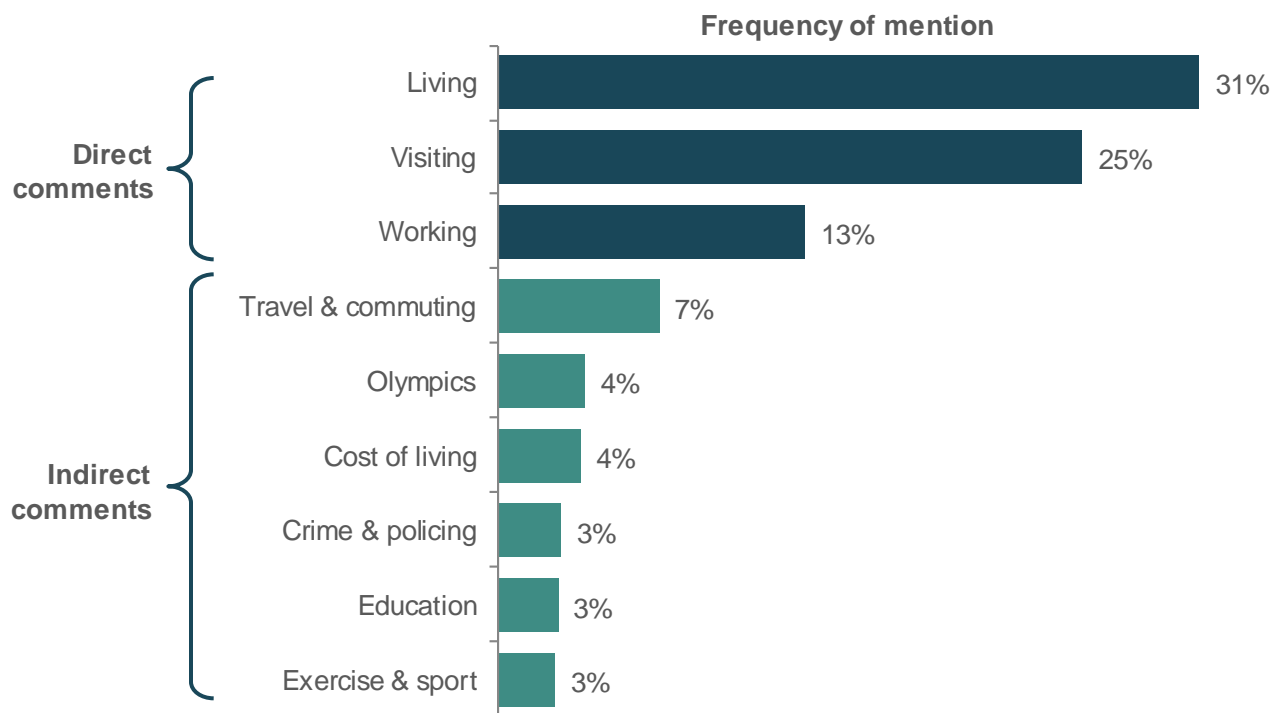
- **Directly:** where the subject of these comments is the experience or expectation of Living, Working or Visiting London (e.g. *"I love coming to London"*), or
- **Indirectly:** the subject of these comments is something else, but which takes place within the broader context of Living, Working or Visiting London (e.g. *"The choice of restaurants in London is amazing"*).

1.3

What do people talk about?

This spread of direct and indirect comments helps identify the other main topics of interest that shape people's perceptions of London.

There were a wide variety of subjects, however, the most common (covering 92% of all comments) clustered into the following broad categories:



Sample size: 3,098 (1,549 before, 1,549 after)

1.4

What do people talk about?

Each subject contains conversations including the following broad areas:



Sample size: 3,098 (1,549 before, 1,549 after)

1.5

Interest: Direct

Examples of these comments and discussions include:

Living

The experience or expectations of living in London.

Conversations include:

- Comparing locations.
- The “London dream”.
- Learning the ways.
- Reaction to cultural icons e.g. National Gallery to Made in Chelsea
- Amount of opportunity: to do or find things.

Working

The experiences of people working or looking for work in London.

Conversations include:

- There being more opportunity.
- The experience that working in London offers.
- Competition in the job market.
- How to qualify to work.
- Pride in where they work or excitement about a new job
- Where best to live for work and other logistical challenges.

Visiting

The experience or expectations of people visiting, or going out in London for fun.

Conversations include:

- Asking advice on what to do or where to go.
- Expressing a desire to visit.
- Sharing their experience of staying/visiting.
- Sharing their experience or expectation of a range of events and attractions.
- Reviews.

1.6

Interest: Indirect

Examples of these comments and discussions include:

Travel & commuting

Any comments concerned with moving into, out of, or around London.

Conversations include:

- Discussing the best way to get around.
- Sharing different experiences.
- London being well connected and easy to get about.
- Congestion and delays.
- Conditions e.g. of the roads, trains etc.

Olympics

Feelings towards and experiences of the Games, including volunteering.

Conversations include:

- Feelings about working or volunteering.
- Impact on the economy (cost vs. benefit).
- National pride.
- Ability to cope.
- Legacy impact.

Cost of Living

Discussions about various costs associated with doing things in London.

Conversations include:

- Relative costs of different areas in London.
- Relative cost of London compared to other places.
- Pressures on the cost of living e.g. investment buying.
- General cost of things in London (e.g. food, going out) compared to other areas.
- Impact of high cost on other aspects of life e.g. saving for a house.

1.7

Interest: Indirect

Examples of these comments and discussions include:

Crime & policing

Comments sharing incidents of, or a fear of crime, and attitudes towards the Police.

Conversations include:

- Sharing experiences of incidents.
- Discussing the relative safety of different areas.
- Observing perceived criminal activity.
- Discussing impact on attractiveness of different areas.

Education

Discussions about comparing the educational quality of different areas and the entry criteria.

Conversations include:

- Which schools/areas are best.
- Different entry criteria.
- Where to study, e.g. within London, and comparing London to other areas.
- Experience or expectations of studying in a particular area.

Exercise & sport

Doing it, talking about it or looking for someone to do it with.

Conversations include:

- Asking advice, e.g. on running / cycling routes.
- Discussing riding to work.
- Looking for exercise buddies or clubs.
- Discussing sporting events.

1.8

Overall opinion: sentiment

Having seen *what* people talk about we can now interpret the comments to observe *how* they feel about London.

In this report we use the term sentiment to describe a person's overall opinion of London. It's a summary of their experiences and feelings as expressed in the comments they have made. We assessed sentiment based on the tone, context, language and content of each comment. In doing so we found that people tend to either feel:

Positive: they feel favourably towards London and want to become involved or stay involved with it in some way.

OR

Negative: they feel badly about London and want to distance themselves (emotionally and / or physically).

"I work in London every week and have often fancied treating my partner [to restaurant name]"

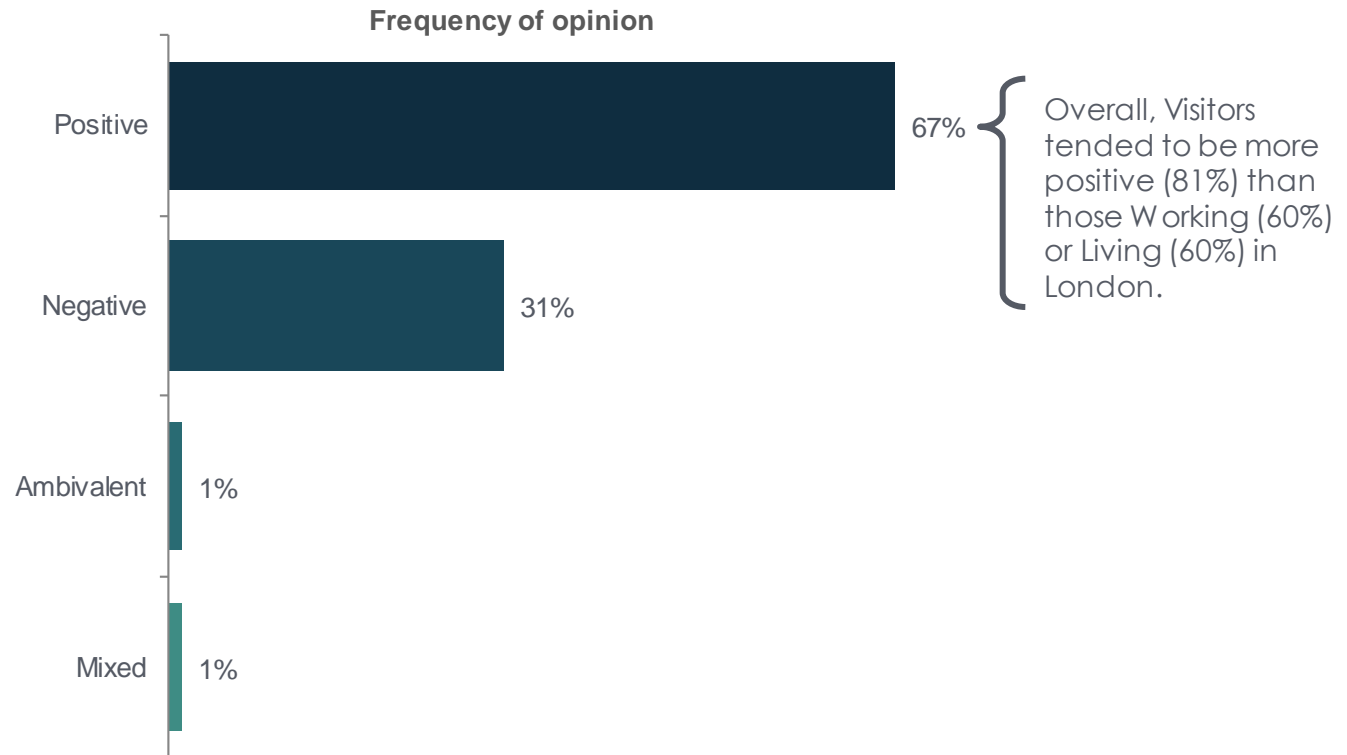
"we're thinking about moving out of the grim [...] London neighbourhood in which we currently live."

There are those who are truly ambivalent or hold balanced, but contrasting opinions; however, these are in the minority (see next page).

1.9

Overall opinion: sentiment

Looking at all of the data (the pre and post-Games data combined), we found that just over two thirds (67%) of the sample felt positively about their experiences or expectations of Living, Working or Visiting London.



Sample size: 3,098 (1,549 before, 1,549 after)

1.10

Specific reactions: emotional response

Another method of exploring perceptions is to look at the dominant emotional response expressed in each comment. This is the reaction each individual had to their experience or expectation of Living, Working or Visiting London.

If we take sentiment as a measure of overall opinion, then the emotional response helps us describe how someone felt about the topic they were talking about at the time. This could be talking about London directly:

"I prefer living in London to NY but I wish [...] was my daily paper."

**Example of a
'like' emotion**

Or indirectly:

**Example of a
'dislike' emotion**

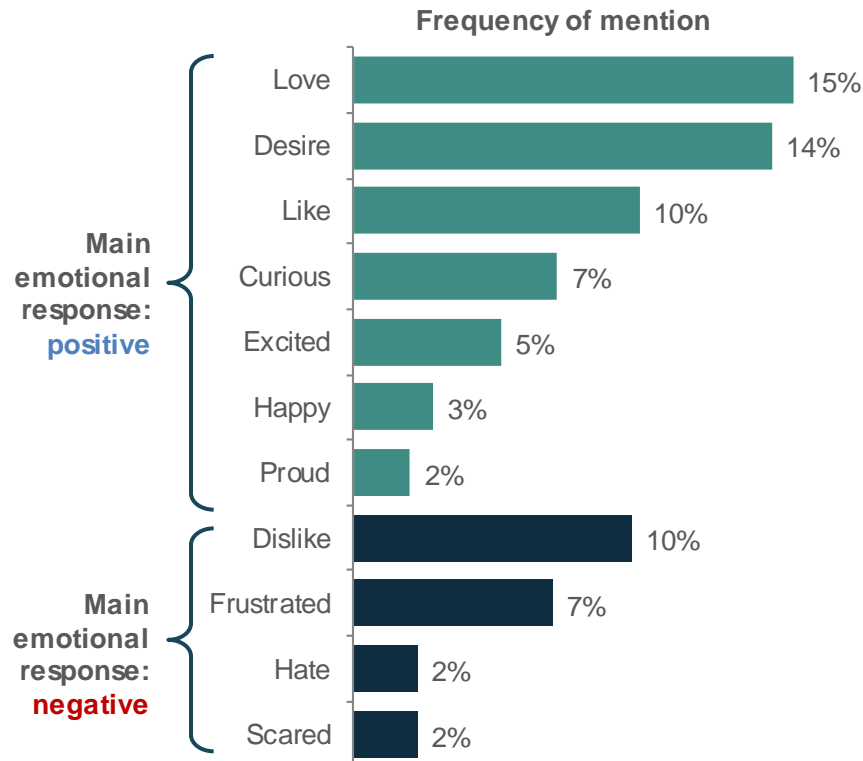
"I hardly drive in due to the epic bottlenecks on the way home..."

There was a huge range of emotional experiences present in the data. However, within these, a number of states captured the majority of the comments (as shown on the next page).

1.11

Specific reactions: emotional response

As you would expect there was a huge diversity in the type of emotions expressed by people talking about London. However the majority of these (76%) tended to fall into one of the following responses:



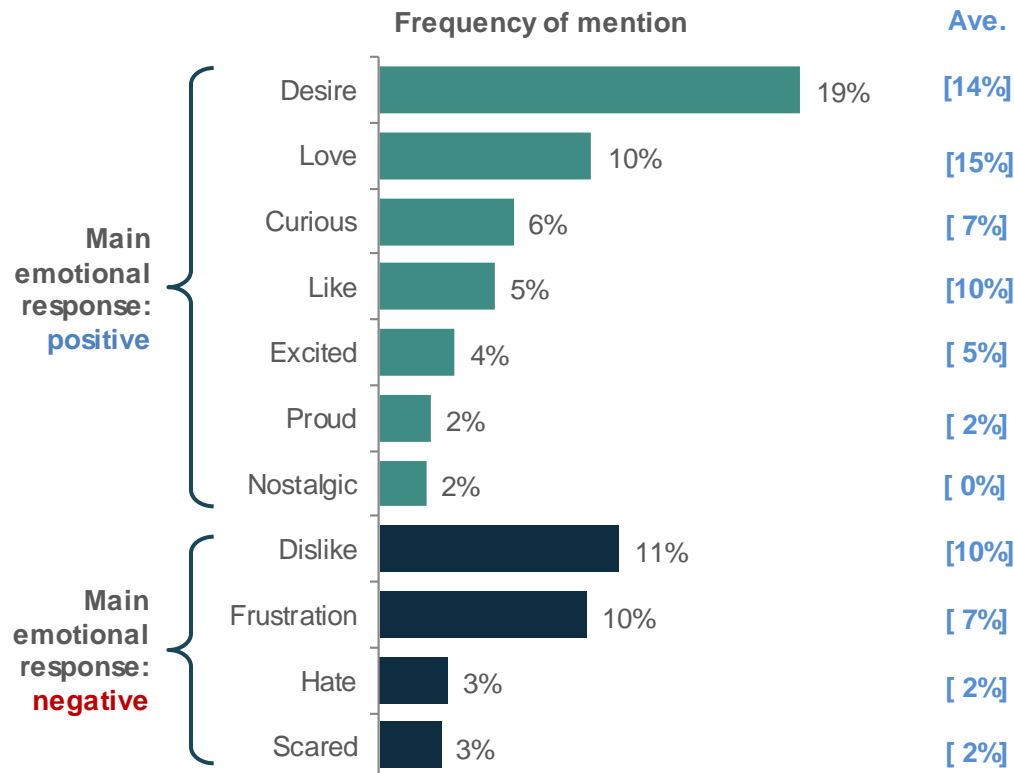
This study looked at perceptions of London, grounded in people's experiences of it as a place to Live, Work or Visit.

As a result of this focus the majority of the emotional responses we observed tended to reflect peoples' **experiences** (e.g. frustration or pride) or their **expectations** (e.g. desire or curiosity).

1.12

Perceptions of **Living** in London

When we look the combined data (pre- and post-Games) we observed people's perceptions of Living in London are mostly positive (60% positive sentiment), but less favourable than the average (67%).



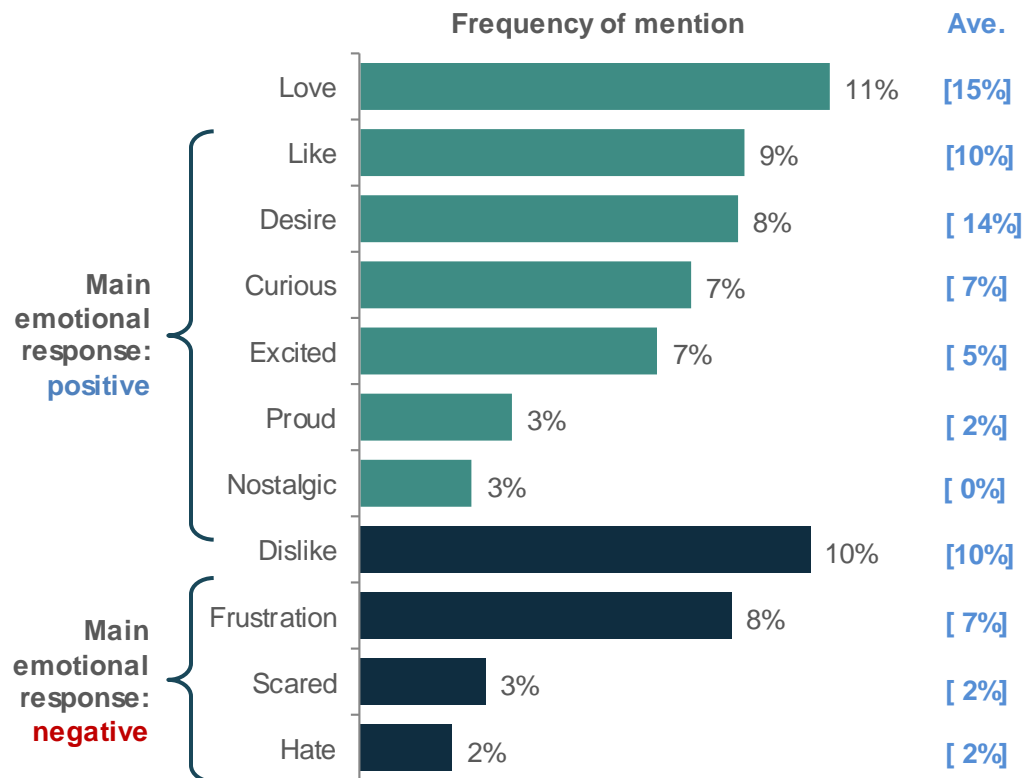
Overall perceptions of **Living** in London differ from the average in terms of:

- The **Desire** to live there is stronger (+5%).
- But the **experience** is seen less favourably with fewer **Like** + **Love** mentions (-10%) and more **Dislike** + **Frustration** mentions (+4%).

1.13

Perceptions of **Working** in London

Looking at the perceptions of those talking about Working in London we again see a mostly positive (60% positive sentiment), but lower than the average, overall reaction (67%).



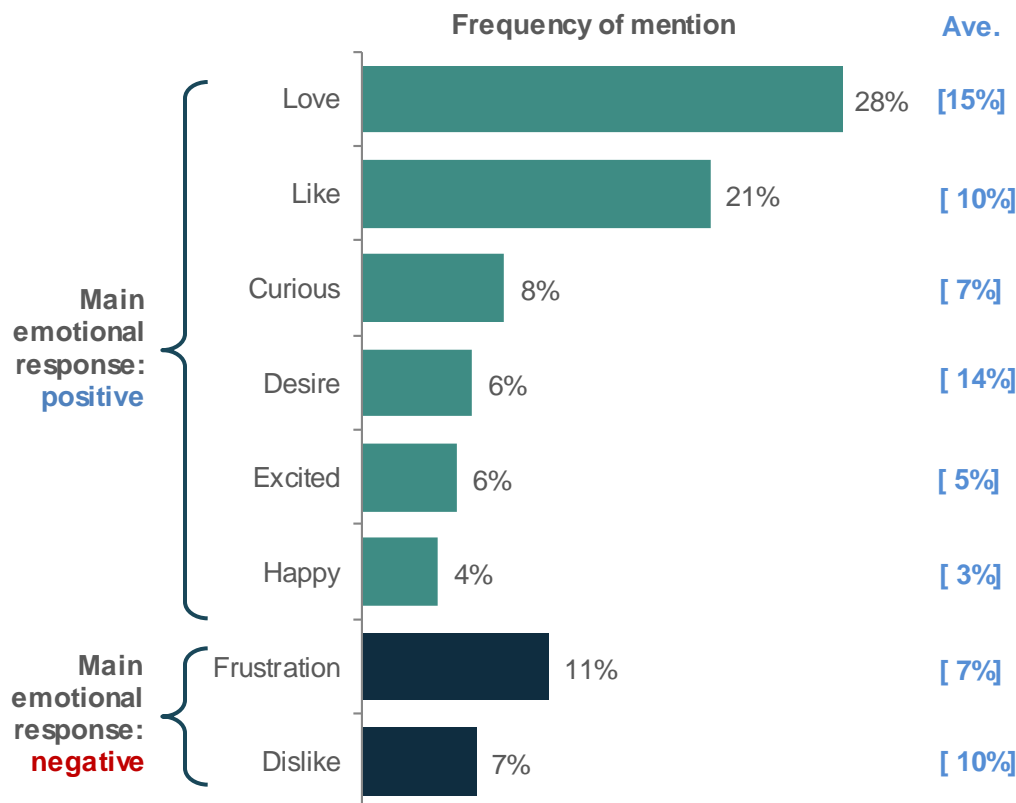
Perceptions of **Working** in London differ from the average in terms of:

- **Excitement** about working in London is slightly stronger (+2%).
- But the **experience** is seen slightly less favourably with fewer **Like + Love** mentions (-5%).

1.14

Perceptions of Visiting London

Visitors to London (those who are planning or who have been) tended to be more positive in their overall perception of London (81% positive sentiment).



When compared to the average, Visitors' perceptions tended to:

- Exhibit much higher **Love + Like** (24%) and lower **Dislike** responses (-3%)
- However, they also exhibited more **Frustration** (+4%)

Desire is noticeably lower (-8%); we expect this might be due to comments relating to a trip that has happened or is being planned, rather than yearning for something currently out of reach.

2 > Have perceptions of London changed?

Comparing perceptions of London before and after the London 2012 Olympic and Paralympic Games

2.1

Introduction

The overall aim of this study was to explore if the London 2012 Olympic and Paralympic Games had any lasting impact on perceptions of London.

To answer this question, we compared how people talked about London in the three months before and the three months after the Games.

We deliberately avoided looking at the Games directly (as this was covered by other research) instead focusing on exploring how people felt about London as a place to Live, Work or Visit. In doing so we were able to examine the impact of the Games on people's everyday opinions, experiences and expectations of London.

Having introduced and described what constitutes 'perception' in the first part of this report, we now look at how these factors compare between the pre- and post-Game periods. It starts with comparing overall perceptions, then looks separately at those changes in perceptions of Living, Working and Visiting London.

Interestingly, the subject of people's conversation changed little between the two periods with a few exceptions. In the post-Games period:

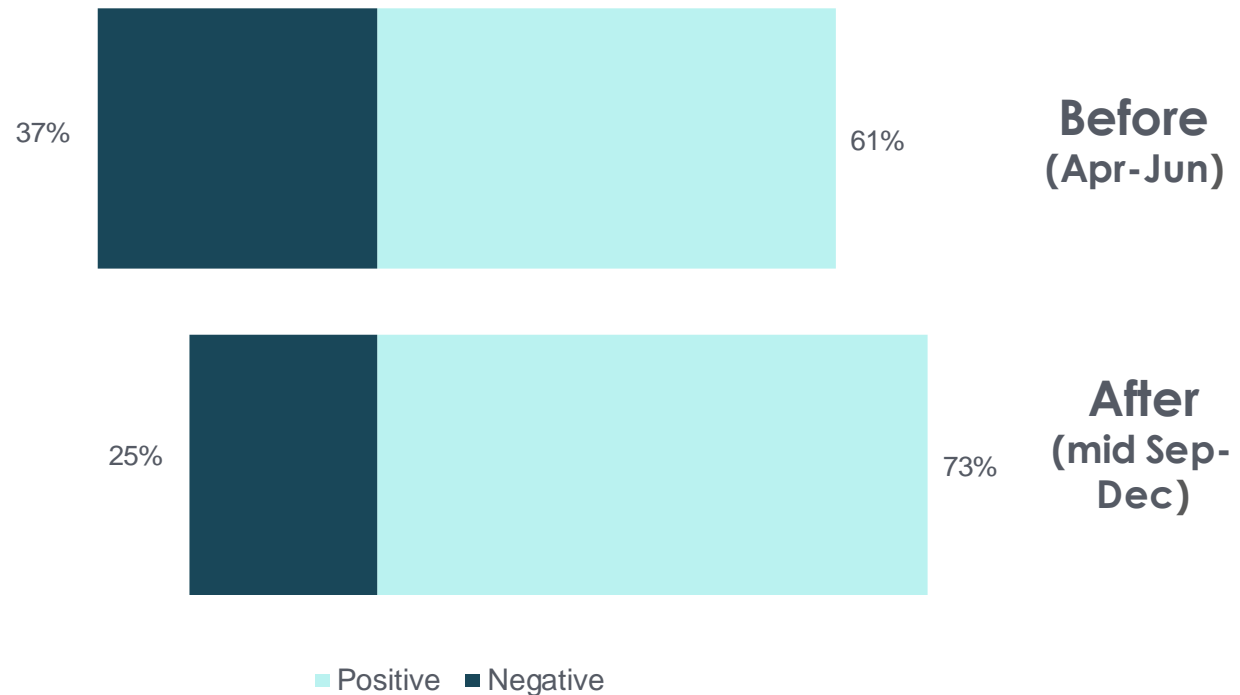
- More people talked about Working in (+6%) or Visiting (+8%) London and fewer about Living (-6%).
- Fewer mentioned the Olympics (-6%).
- More people mentioned sport and exercise, particularly those talking about Living in London (+5%).

2.2

Overall perceptions of London

We observed a +12% **increase** in overall positive sentiment towards London in the period after the London 2012 Olympic and Paralympic games.

This represents an increase in the total sum of positive experiences, expectations and opinions from those talking about Living, Working or Visiting London.

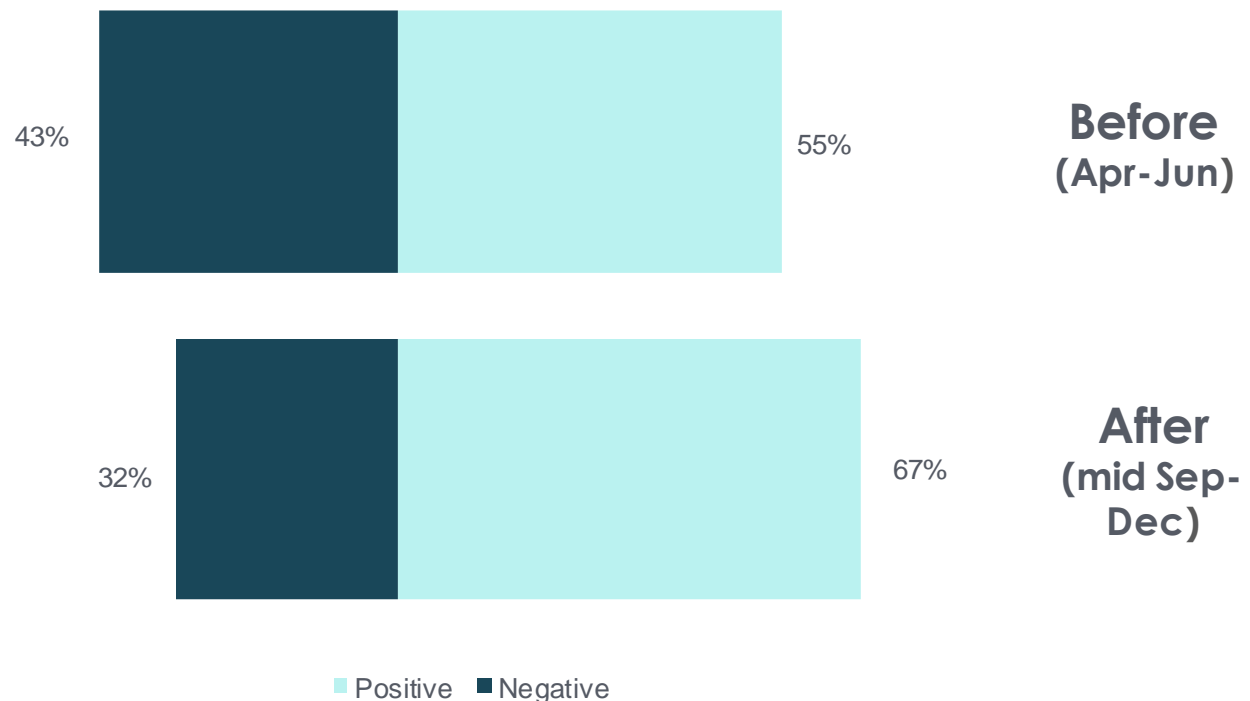


Sample size: 3,098 (1,549 before, 1,549 after)

2.3

Perceptions of **Living** in London: **sentiment**

Looking at sentiment for those talking about **Living** in London, we see an increase in the incidence of positive feeling of +12%.

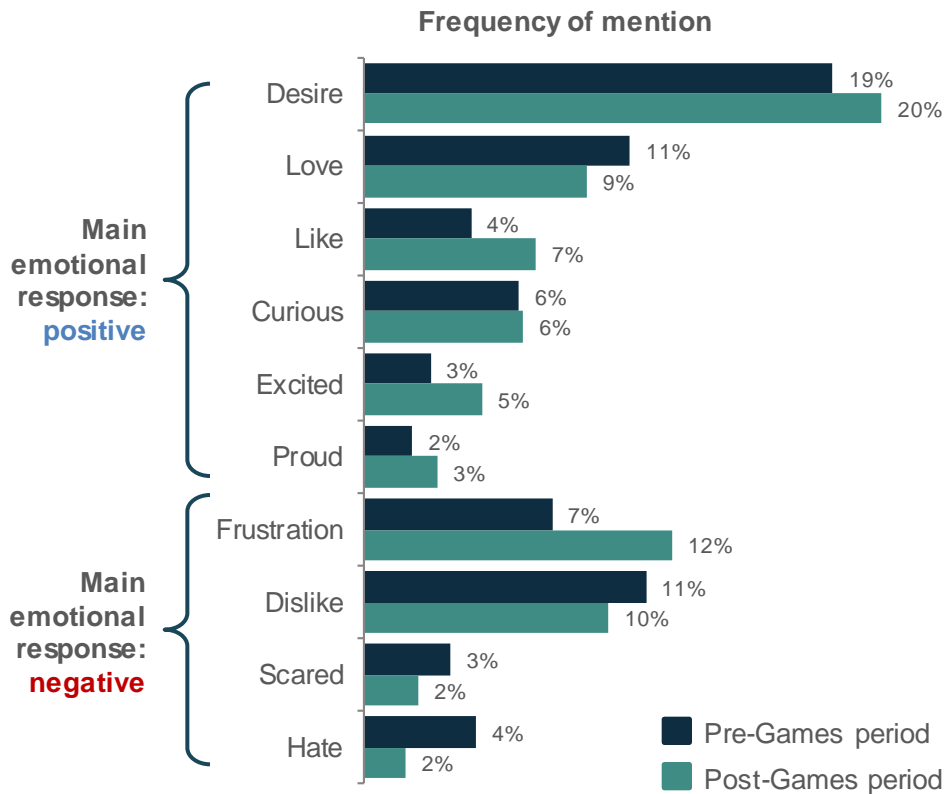
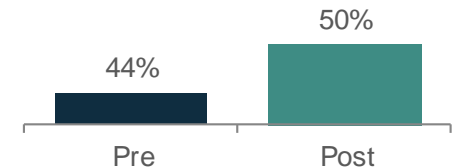


Sample size: 1,799 (1,001 before, 798 after)

2.4

Perceptions of **Living** in London: **emotions**

Comparing the most frequent emotional responses* before and after the Games we saw a higher incidence of positive (+6%) reactions.

Incidence of most frequently occurring **positive** emotionsIncidence of most frequently occurring **negative** emotions

The incidence of negative emotions remained at 26% for the post-Games period. However, this masks a higher incidence of **Frustration** (+5%) and reductions in the other most common emotional responses (see chart opposite).

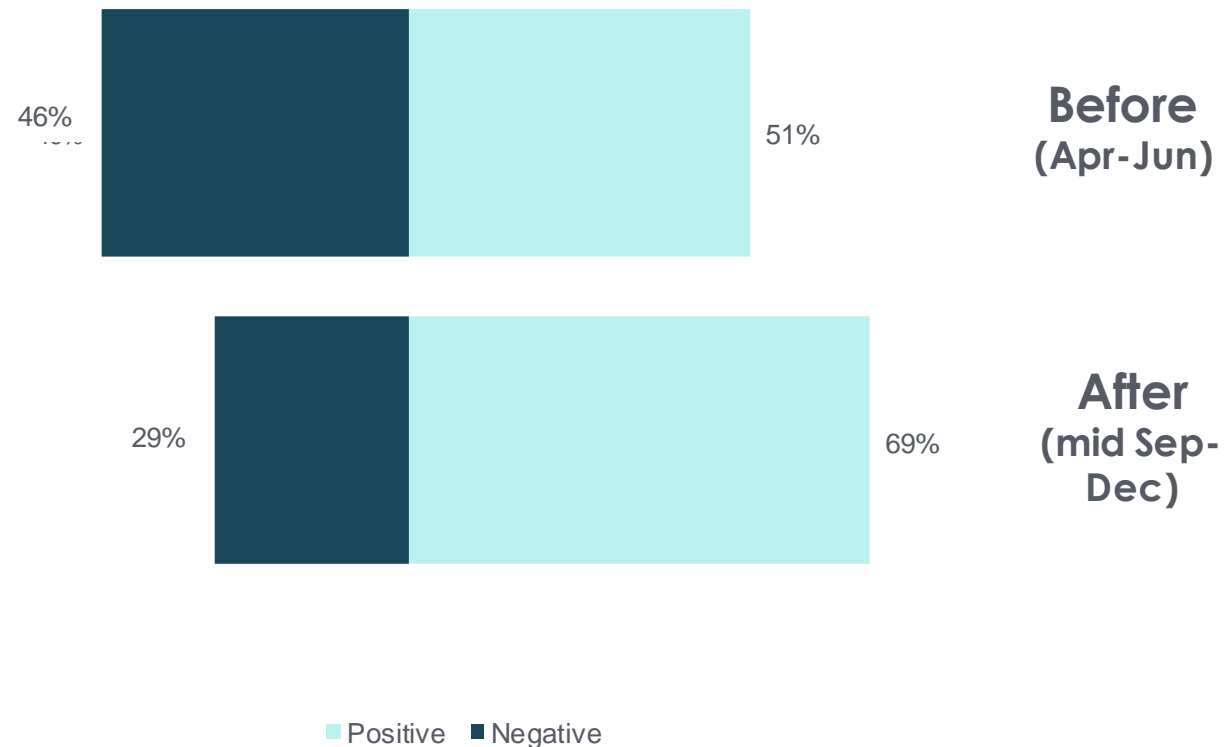
Sample size: 1,796 (1,001 before, 798 after)

* These account for account for between 70-75% of all comments

2.5

Perceptions of **Working** in London: **sentiment**

Attitudes towards **Working** see the biggest increase (+18%) in positive feelings.

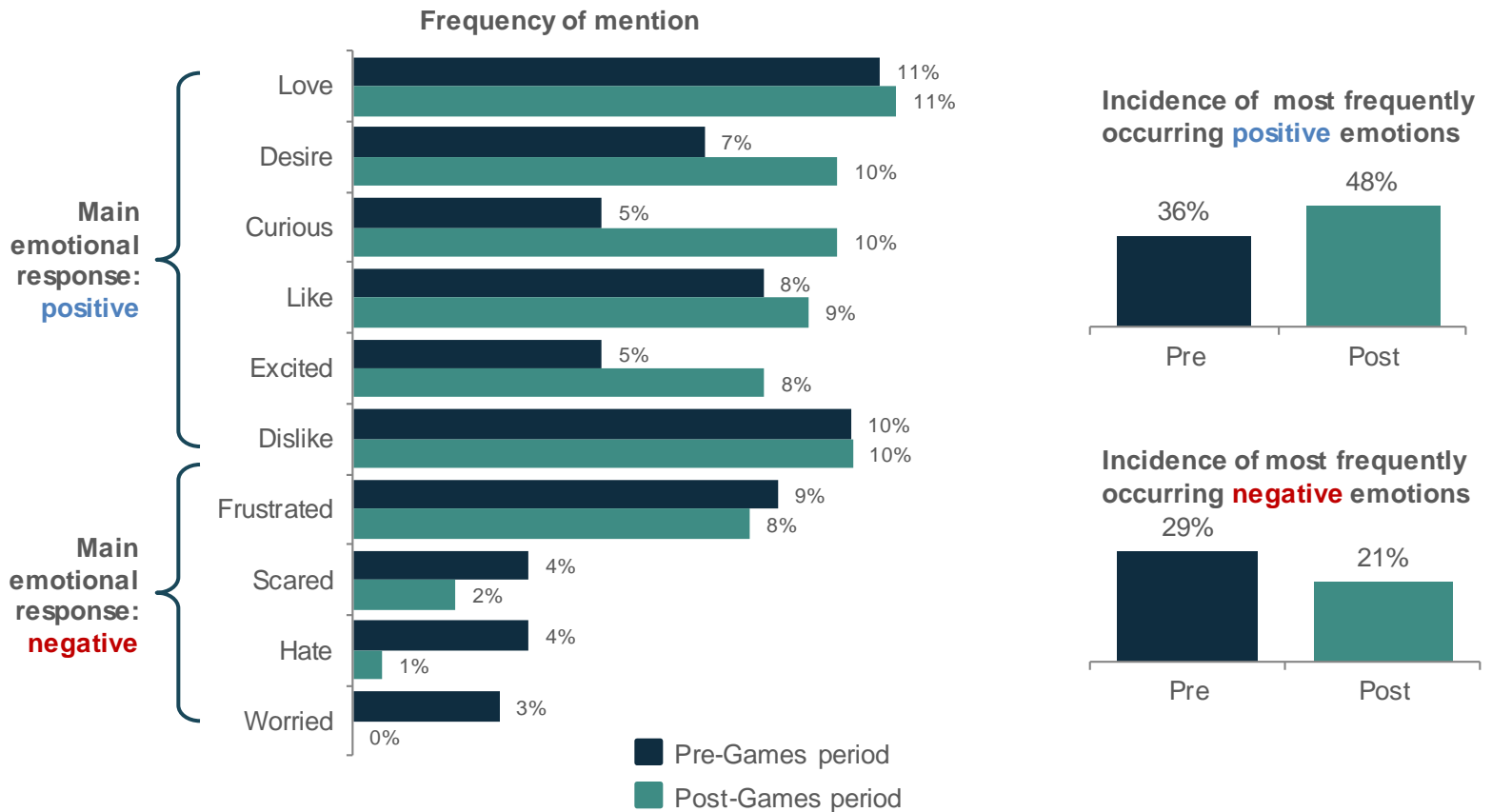


Sample size: 672 (334 before, 338 after)

2.6

Perceptions of **Working** in London: **emotion**

The post-Games period sees increases in all of the most frequently occurring* positive emotions with an overall increase of +12%.



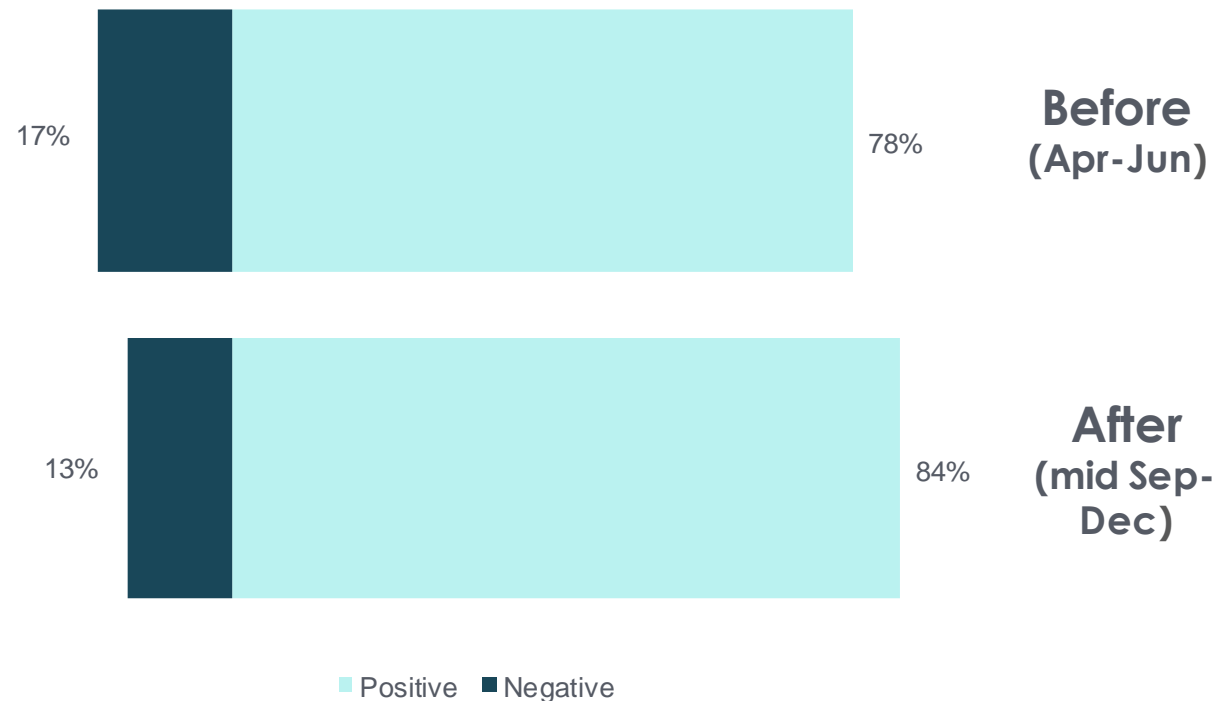
Sample size: 672 (334 before, 338 after)

* These account for account for between 65-69% of all comments

2.7

Perceptions of **Visiting** London: **sentiment**

Feelings towards **Visiting** London were more positive than the overall average (all comments) and have grown stronger (+6%) after the Games.

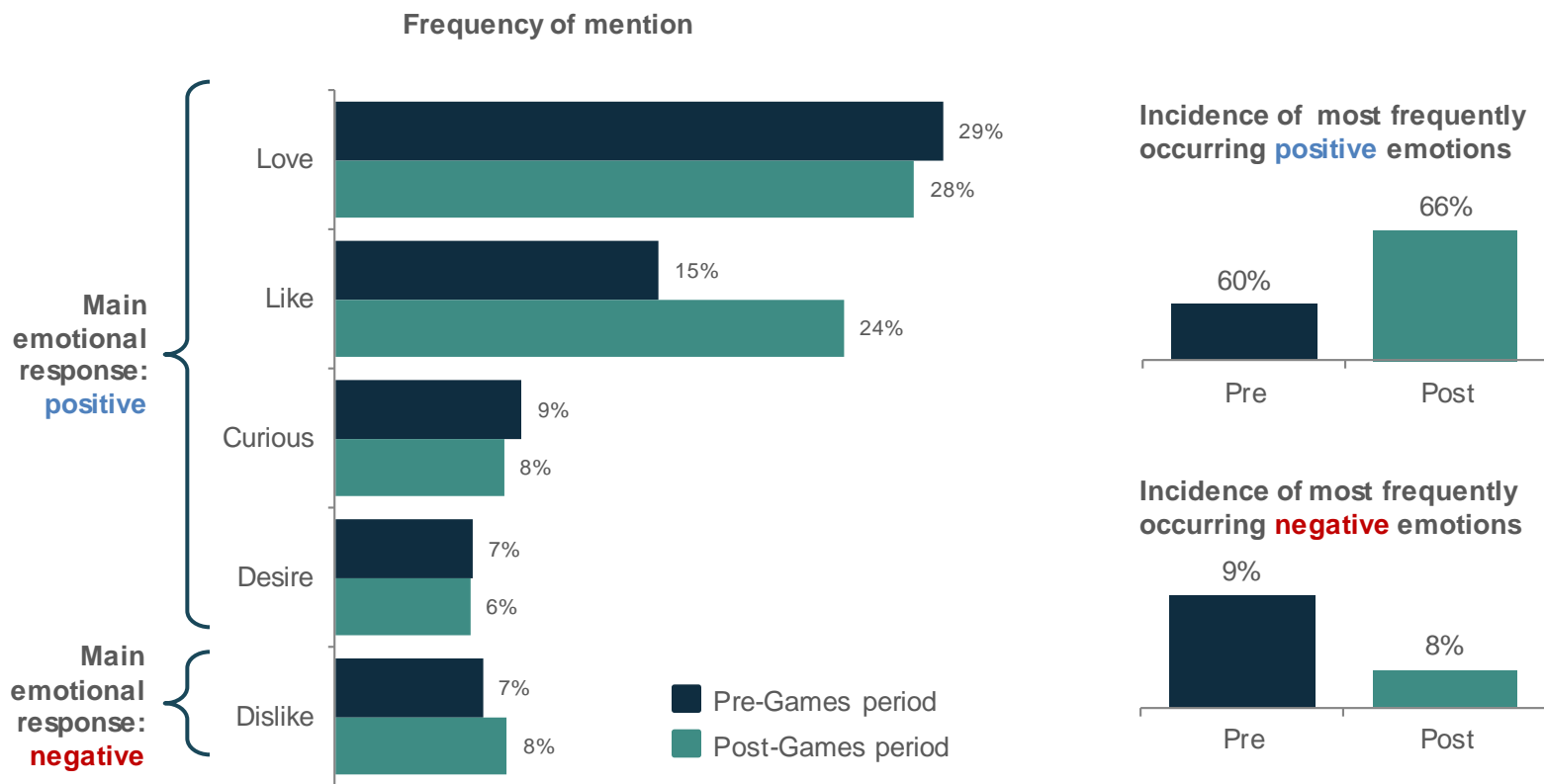


Sample size: 989 (429 before, 560 after)

2.8

Perceptions of Visiting London: emotion

The post-Games period also saw a proportionately higher (+6%) incidence of the most common* positive emotional responses.



Sample size: 989 (429 before, 560 after)

* These account for account for 70-75% of all comments

3 > Conclusions

3.1

Conclusion

The Mayor of London has been committed to delivering a successful Games and securing a viable and sustainable legacy.

London's vision for the 2012 Games was "to host an inspirational, safe and inclusive Olympic and Paralympic Games and leave a sustainable legacy for London and the UK". This included showcasing London - maximising the opportunities to showcase London to the world as a place to live, visit, work, learn and invest.

The GLA is now evaluating the impact and legacy of the 2012 Games and the GLA's City Operations programme. As part of this overall evaluation this project aimed to see if there was any change in the way that people talked about London before and after the Games, which might speak to the impact of the Games on these perceptions.

These findings will sit along side other results to help provide a thorough and holistic view of the impact and potential legacy of the London 2012 Olympic and Paralympic Games.

3.2

Conclusion: main findings

In observing thousands of individual comments about people's experiences of Living, Working or Visiting London before and after the Games we have reached the following main conclusions:

- Overall, most people feel positively about London (67% positive sentiment), with Visitors the most keen (+14%).
- People **feel more positively** (+12%) about London in the period **after the Games**, both overall and in terms of their specific experiences or expectations.
- This increase in positive feeling is represented across each activity (meaning that the increase isn't simply a result one factor e.g. more tourists).
 - 12% more people felt positive about London as a place to **Live**
 - 18% more people felt positive about London as a place to **Work**, and
 - 6% more people felt positive about London as a place to **Visit**

This project is a first of its kind and has provided evidence on the impact that the Games has had on people's perceptions of London, as expressed by the way they talk about it, rather than a response to a question.

It would be useful to contrast these findings over time or with other cities to help provide an independent comparison.



About us

We help people think differently and act differently.

Get in touch

Jeremy Hollow / Founder

T: 07799 415829

E: jeremy@listenandlearnresearch.com

W: listenandlearnresearch.com

#LALResearch

Or connect on [LinkedIn](#)