QUEEN ELIZABETH OLYMPIC PARK

VISITOR RESEARCH 2016/17

UNDERTAKEN BY VECTOR RESEARCH

1. The study

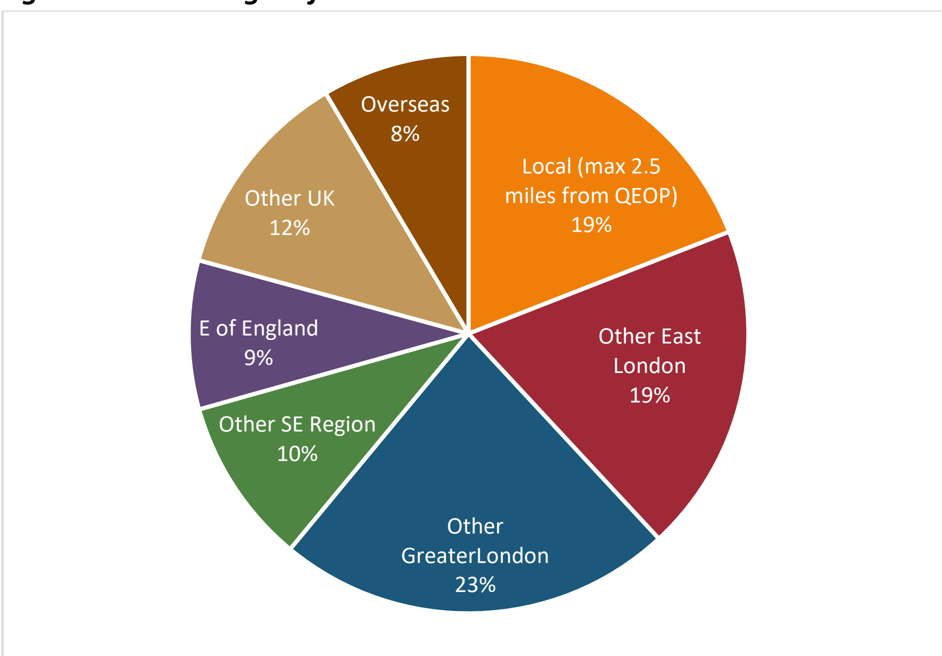
This report analyses data from 3 waves of surveys conducted during 2016-17 with visitors to Queen Elizabeth Olympic Park (QEOP). Each wave involved 1,250 face to face interviews conducted at a mix of locations. Waves were conducted in July/August, October/November and February/March to ensure the most representative sample. Subsequent sections of this summary address findings relating to the profile of visitors; motivations and visitor behaviour; and attitudinal data on satisfaction and perception.

2. Profile – who visits QEOP?

2.1 Local, sub-regional, UK wide and international visitors well represented

The starting point for understanding the profile of visitors is the home origin breakdown shown below.

Figure 1: Home origin of visitors



- Almost 4 in 10 come from east London
- Almost two-thirds come from London as a whole
- Almost a third from the rest of UK
- Eight percent are from overseas

2.2 Generally a profile which reflects the catchment

Table 1: Representation of key profile groupings		
Good representation in terms of key dimensions:		
Category	*Theme*	*Evidence/explanation*
Age	Peak in younger adult groups (25-44); however all age groups well represented	Parents Young adult “actives” Local population has peak in 25-44 compared to UK
Ethnicity	One third (34%) BAME	Less than east London (46% BAME) but much higher than UK mean of 12%; would expect around one-third if representative of ethnicity in each segment in Figure 1
Slight bias in gender and socio-economic/employment profile:		
Category	*Theme*	*Evidence/explanation*
Gender	Slight female bias	56%
SEG	Good mix of classifications	All socio-economic groups well represented with a slight bias towards white collar/higher income respondents (AB,C1 and C2s) compared to UK and local population.
Employment status	80% of 16-64s employed	Higher than UK/London averages of 70-74% during survey period – i.e. fewer economically inactive at QEOP
Under-representation in disability		
Category	*Theme*	*Evidence/explanation*
Disability	4%	Higher numbers of disabled visitors during summer

2.3 Seasonality trends emerging?

From wave 1 (summer July/August) to wave 2 (mainly October) to wave 3 (late winter i.e. February/early March) observed:

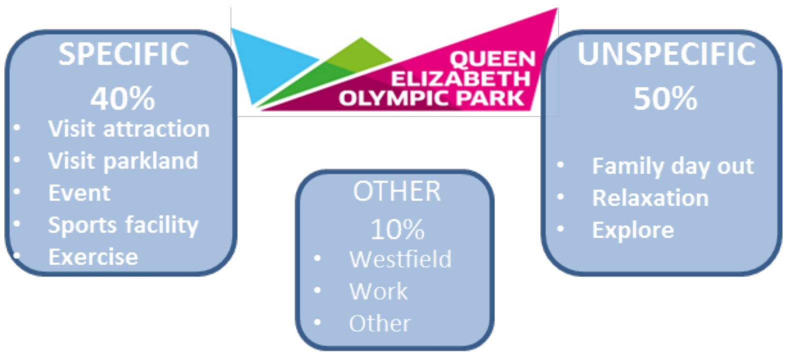
- Increasing ”peakiness” in terms of young adult age groups (25-34 and 35-44s)
- very limited presence of 65 and over in wave 3 (winter)
- fewer BAME respondents in wave 3
- More local and London based visitors in wave 3
- Significant disability presence in summer but v limited in other waves.

After just one year of surveys it is not possible to determine whether these trends in profile are purely seasonal or a reflection of more medium to long-term changes in demand.

3. Behavioural data – motivations and activity of visitors

3.1 Primary motivations – two broad categories

In terms of primary reason for visiting QEOP, the bulk of visitors split fairly evenly into *specific* motivations and more general *unspecific* motivations:



The *specific* group (40%) can be further split in to

- *Active* participants (12%) who use sports facilities, run, cycle or walk for fitness
- *Passive/spectator* attenders (28% of all visitors) who visit attractions, attend football or visit parkland/park events.

In addition a small proportion were visiting primarily for Westfield shopping, work purposes or the main "other" response of café visits/rendezvous.

3.2 Seasonality – proportionally more 'specific purpose' visits in winter

Wave 3 (Feb-Mar) yielded a lower representation of general or *"unspecific"* motivations. Thus in winter there is a greater proportion of *activity driven* visits to QEOP.

- Unspecific motivations fell from 63% (wave 1) to 38% (wave 3)
- Specific motivations conversely increased from 27% (wave 1) to 52% (wave 3)

3.3 Key penetration data – ArcelorMittal Orbit as dominant attraction

As well as primary motivation for visiting, respondents were also asked about other (secondary) pre-planned reasons for visiting and any unplanned activity/venue visits once they were on-site. Adding the three responses together provides us with a figure for total penetration as follows:

- ArcelorMittal Orbit 21.5% of visitors
- Parkland 12.9%
- London Aquatics centre 6.0%
- Lee Valley Velo Park 4.3%
- Copper Box Arena 2.0%
- London Stadium 1.6% ex. matchday

3.4 Crossover – dominated by Westfield

Over a third of visitors (36%) also visited venues outside of QEOP, with four in five (81%) of these also going to Westfield. Of the remainder, almost all were visiting central London visitor attractions. Greater level of (non-Westfield) crossover was observed in wave 1 followed by wave 2, implying greater significance of tourism based visits in summer and to a lesser extent autumn.

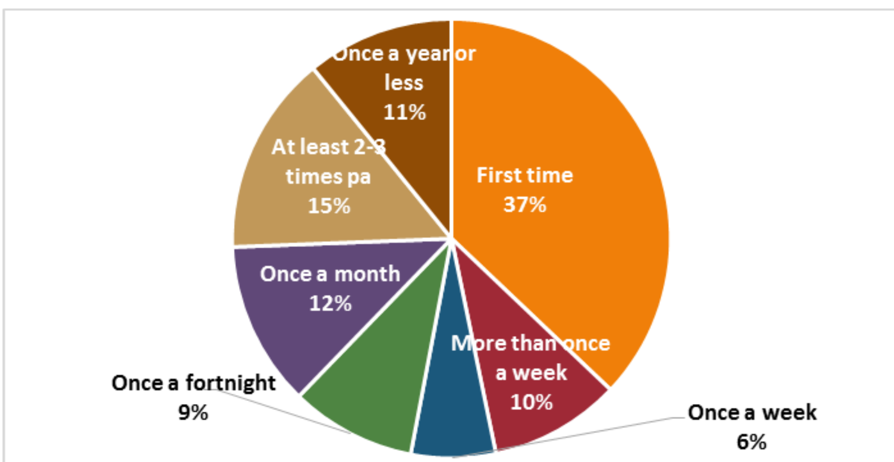
3.5 Spend of £18 per head

Total expenditure of around £18 per respondent was recorded during the visit. NB t*his excludes pre-visit spend which may well be significant in many cases (online or other pre-purchased tickets for West Ham matches, stadium events, cycling/tennis/swimming/Orbit fees for example.* However it does give an indication of the level of spend generated *during* the visit.

3.6 Repeat visitors – around 4 in 10 are first-timers and similar number are regulars

In terms of frequency of visits:

- Over one third are ***first timers*** i.e. 37% -particularly high in wave 2 (42%)
- An equally large group (37%) of ***regulars*** (at least monthly) – but lowest in wave 2
- *"Occasionals"* (less than monthly) consistently account for around a quarter i.e 26%



3.7 High propensity to re-visit

Respondents were asked when they were likely to re-visit.

In the next week	24.0%
In the next month	23.3%
In the next 6 months	16.9%
In the next year	28.3%
Unlikely to visit again	7.5%

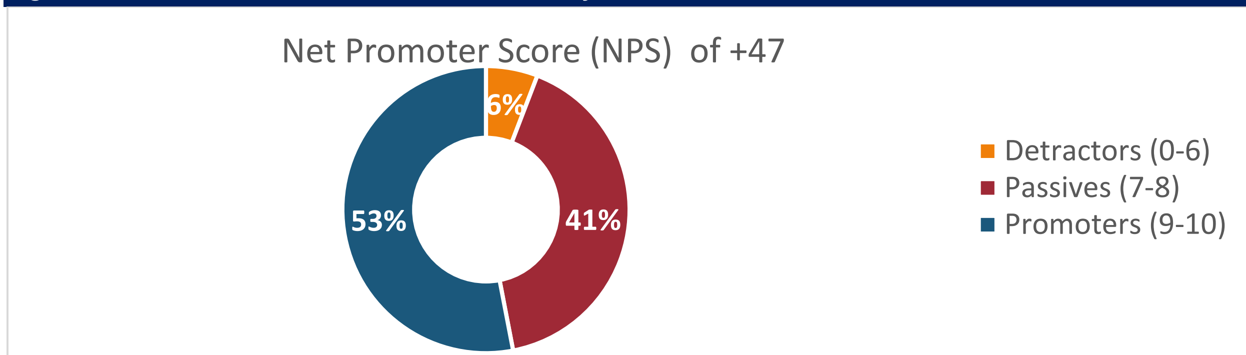
A substantial proportion (47%) plan to visit again within the next week or month, and 92.5% are planning another visit at some point within the next year. Only 7.5% were unlikely to visit again – of these, more than 4 in 10 were from overseas i.e. for whom a one-off or occasional visit is the norm and likelihood to re-visit may well have nothing to do with the quality of the QEOP offer. In addition many of the remainder gave a positive satisfaction score – so it is estimated that around 1.9% are not returning because of moderate or low satisfaction.

4. Visitor attitudes – how do they rate The QEOP offer?

4.1 Positive responses

The two key attitudinal indices from the survey produced very positive responses as below;

Figure 2: Net Promoter Score and mean satisfaction



Based on the question *"How likely are you to recommend QEOP to friends/family on a scale of 1 (unlikely) to 10 (very likely)"*

Overall rating of satisfaction with visit (out of 10):

8.3

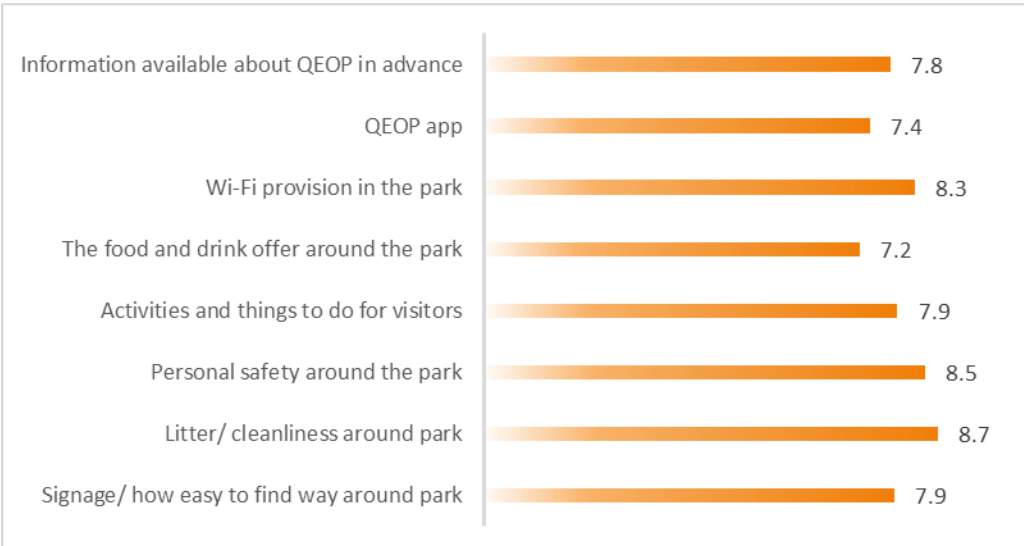
There was a slight downward trend observed across the waves, h*owever this result should be set against a substantive difference in weather.*

4.2 High level of consistency across visitor groups

The summary reports for each survey wave include analysis of satisfaction by demographic, socio-economic and motivational groups – analysis which identified very strong consistency i.e. there were no obvious sub-groups of visitors with significantly more negative or positive views.

4.3 Specific criteria generally score positively

Respondents scored each of the individual criteria 7.2 or more (out of 10). Score for litter / cleanliness (8.7) and personal safely (8.5) scored highest. Lowest scores were for food and drink offer (7.2) and QEOP app (7.4).



4.4 Disability - limited negative responses

People with health problems/disabilities limiting day to day activities were asked to rate *Accessibility/getting around QEOP* which produced an overall mean of 7.0 out of 10. Although it should be noted that this is a very small sample size.

4.5 QEOP is positioned fairly positively against several key criteria - but awareness issue?

Respondents were presented with a series of statements about QEOP so that perceptions could be tracked in relation to the aims and objectives of LLDC. There were generally good levels of agreement for each factor (i.e. 7.0 was the lowest mean and 8.0 the highest)

Perceptions of QEOP with response rates for each factor

QEOP offers………..	Mean	% response
top class sports events	8.0	71.3%
a range of opportunities for participation in sport	7.9	70.6%
a range of arts and culture activities and events	7.0	46.9%
a host of community events	7.2	46.5%
a “must see” visitor attraction	7.5	90.7%
a great place to live	7.2	72.5%
a range of work opportunities	7.1	49.2%

Based on a scale of 0 (no agreement) to 10 (total agreement)

Analysis of east London-based respondents produced almost identical responses but higher proportions responding - implying slightly greater awareness

4.7 Verbatim responses identify some areas of perceived shortfall

In wave 3 respondents were asked to justify their NPS score. The main positive verbatim comments were generic (good, great, excellent, etc.) or related to specific high quality facilities. Of the very small number of respondents giving a low NPS score (6%), the main negatives included;

- Lack of activity and events in the winter period
- Perceived signage shortfalls
- Cafes
- The aesthetics of the site including greenery, and a perceived bleakness.

NB these comments are from the winter wave only

5. Thematic summary analysis

5.1 Consistent levels of satisfaction

Despite the divergence in motivation, levels of satisfaction remain high and very consistent in terms of mean score for overall satisfaction with the visit with;

- Regular actives (8.6) giving the highest score
- Occasional actives (8.0) giving the lowest rating

5.3 Football impacts – visitor satisfaction not adversely affected

The impact of West Ham's move into the London Stadium in 2016 – in terms of visitor satisfaction – was negligible. Respondents gave very similar, positive scores on both match and non-match days.

5.4 Observable trends

The main trends observed over the three waves of surveys were

- Fewer older visitors in winter, more 25-34 and in particular 35-44s in the winter wave
- Fewer visitors with a disability outside the summer months
- Relatively more local and fewer overseas and non-London visitors in winter
- Relatively more specific motivations in winter
- Slight decline in satisfaction and NPS from wave 1 through to wave 3
- Improving perceptions based on the battery of criteria presented

Having conducted the three surveys commencing in July 2016 and finishing in March 2017 it is difficulty to attribute discernible changes in mean response to a medium or longer-term trend. Indeed they may well reflect a mix of statistical chance and/or seasonal changes in the demand profile and their engagement with and attitudes to the QEOP offer.