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London Legacy Development Corporation

Queen Elizabeth Olympic Park – Covid Research



Introduction

The Nursery Research have been undertaking visitor and market research for Queen Elizabeth Olympic Park on behalf of LLDC for the past 3 years. Each year consists of 3 waves of research per year, consisting of onsite and online interviews.

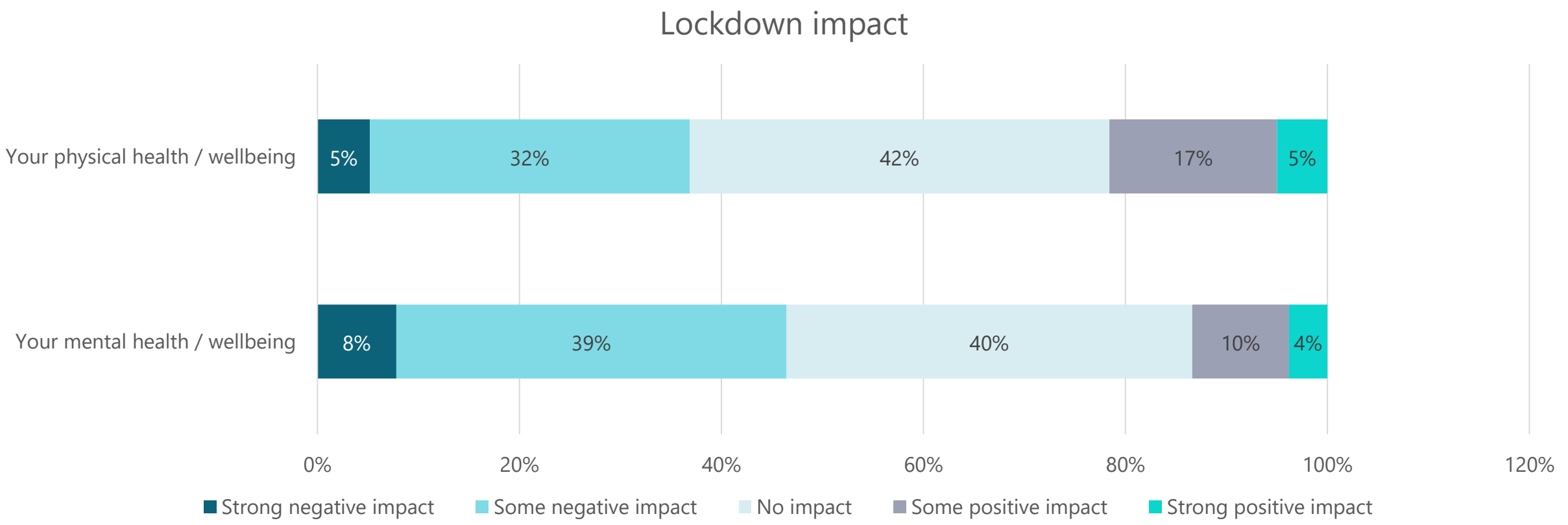
The 2019/20 survey has had 2 normal waves of research but the final wave was due to happen when the UK was in the middle of the coronavirus pandemic. As there was no face to face research of visitors and the market survey was very much focused on visitors, we changed the scope of this wave to understand the impact of parks and outdoor spaces during the pandemic, as well as how behaviour might change as we come out of lockdown.

The aim of this wave is to help the marketing and communications team to understand what messages they should be going out to consumers with to attract them back once the lockdown ends.

This wave consisted of 1,000 online interviews (500 in East London, 250 in the rest of London, 250 in East and South East England). The interviews were conducted 12th June – 16th June 2020.

The lockdown has impacted mental health more than physical health

NET IMPACT OF 33% NEGATIVE IMPACT ON MENTAL HEALTH



Question: What impact has the lockdown measure had on you in relation to...
Base: All respondents (1001)

Worst things about lockdown

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Boredom

Not seeing friends or family

Loneliness/ isolation

Lack of entertainment options

Job/ income worries

Inactivity/ 'switching off'

> My mental health has been badly affected. I feel lonely, isolated and defeated.

> The loss of most forms of entertainment, specifically the theatre.

> I've done less exercise, I've eaten more unhealthy, my mental health is bad.

> Not being able to see family.
> Not being able to take holidays.
> Not being able to socialise.

> miss human contact, hard to manage my work remotely, more tension in household

Are there any positives to come out of lockdown

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"None" for many

Saving money

More free time

Working from home/ less commuting

More family time/ time with kids

Less pollution

> Sleeping better, getting perspective, becoming closer to family and friends, more time to relax, learning how to cook better.

> More time with my children

> Noise pollution is less, especially air traffic. A variety of new birds have visited my garden.

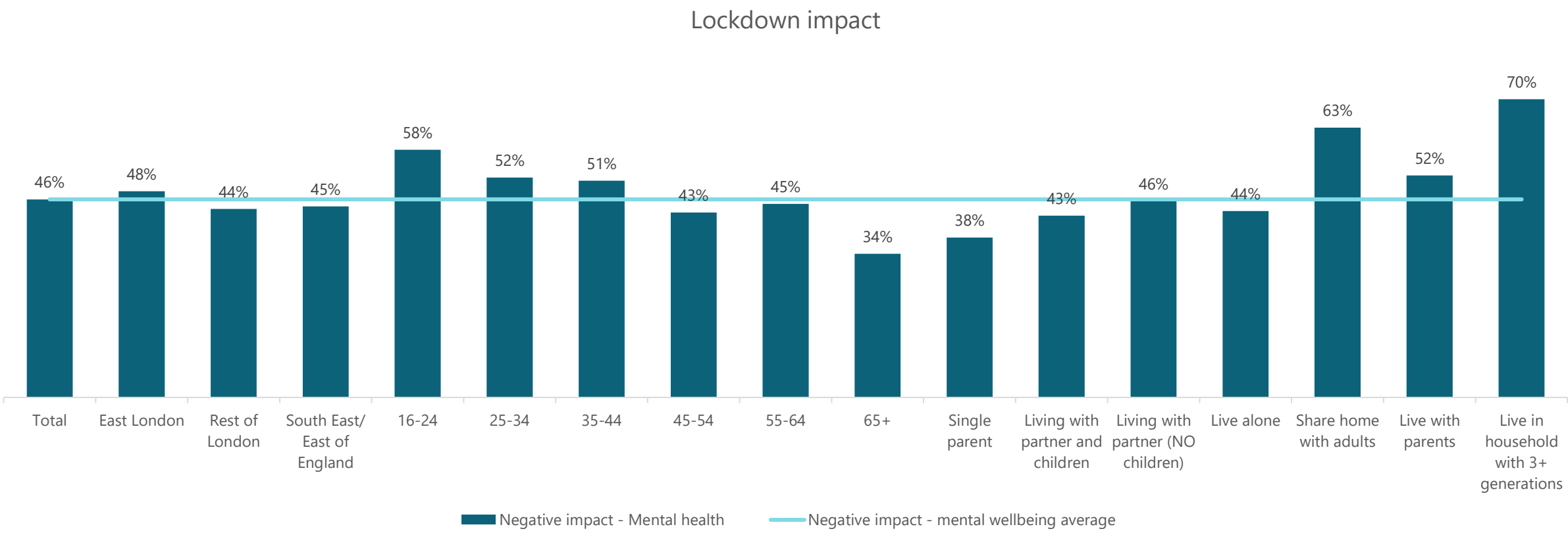
> Working at home so I don't have to deal with vile commuting and crowds of morons.

> taken up exercise and long walks which I never used to do

> Got to know my local area and appreciate the changes in nature. Increased my daily exercise.

It is impacting the younger age groups and those who share accommodation

BEING CONFINED WITH OTHERS EVERYDAY IS TAKING ITS TOLL

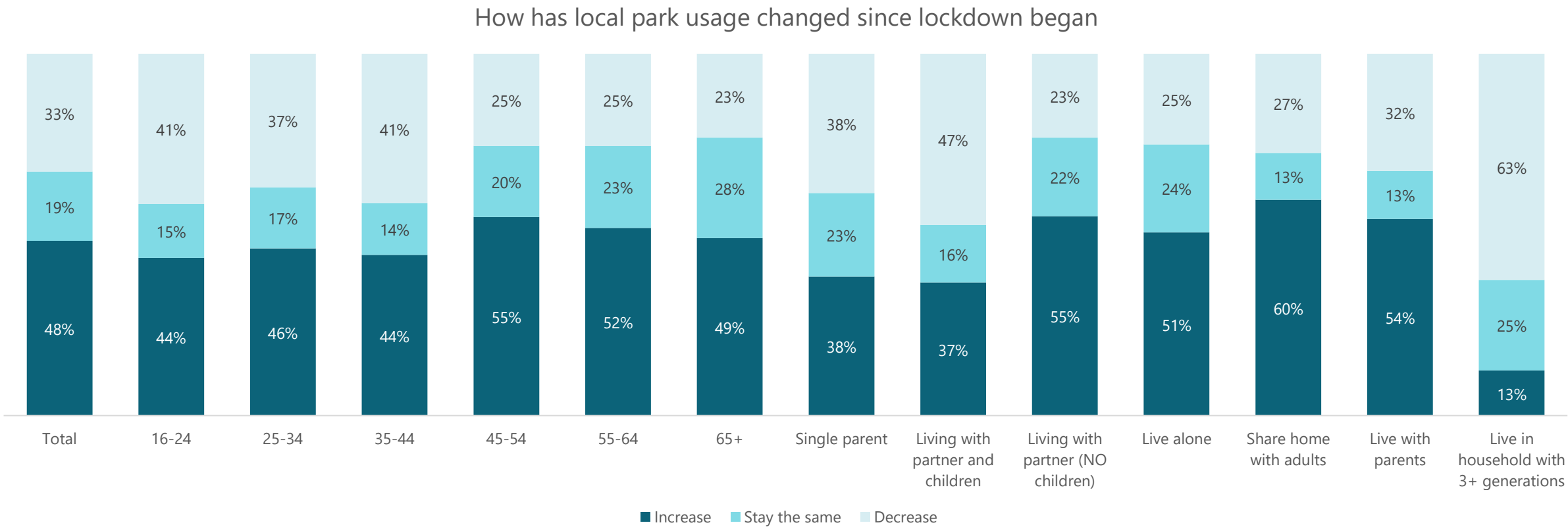


Question: What impact has the lockdown measure had on you in relation to...
Base: All respondents (1001)

House sharing people have increased their usage of local parks and outdoor spaces during the lockdown

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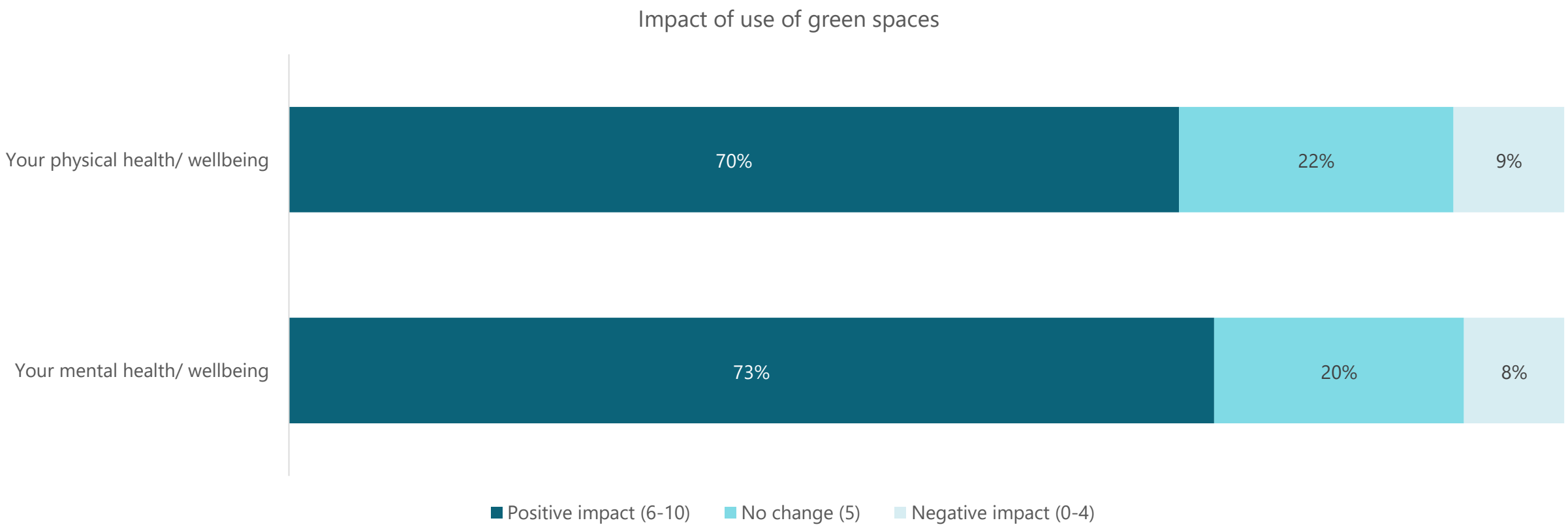
OVERALL THERE IS A NET INCREASE OF 16% FOR LOCAL PARK USAGE



Question: How has your use of your parks/ green space changed since lockdown began?
Base: All respondents (1001)

Green spaces have provided a positive impact during the lockdown

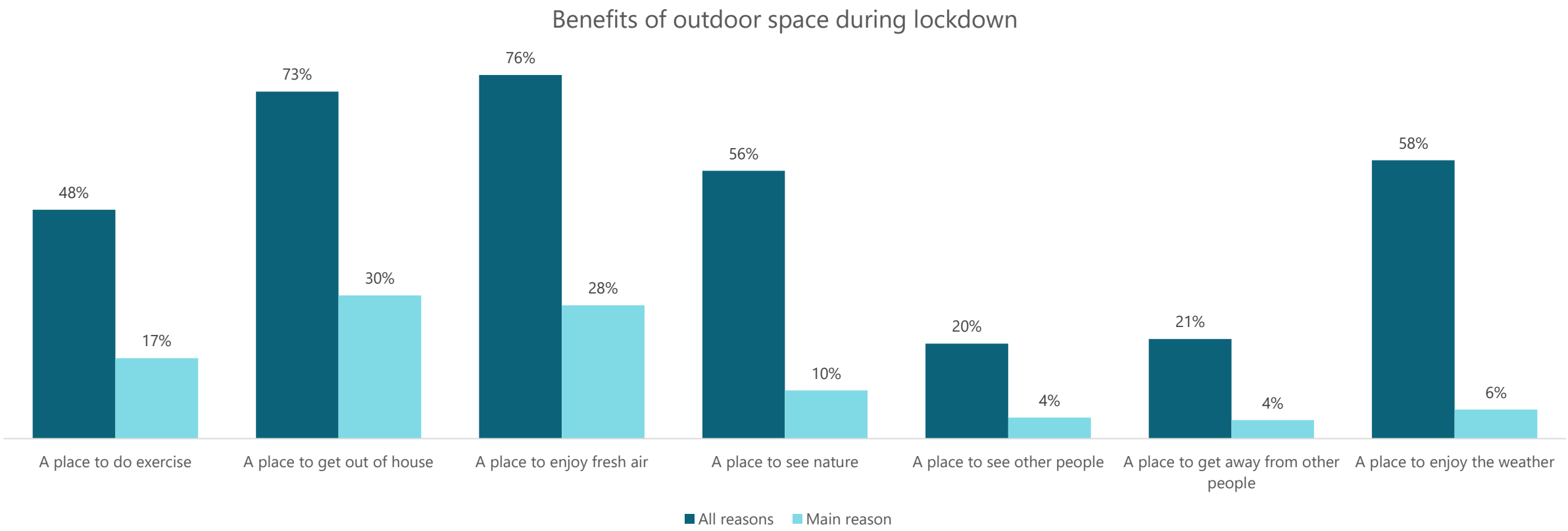
LARGELY UNIVERSAL OPINION BUT SLIGHTLY LOWER FOR THE OLDER AGE GROUPS



Question: To what extent has your use of parks / green space affected...?
Base: All respondents (1001)

Parks have provided a welcome change of scene and fresh air for most

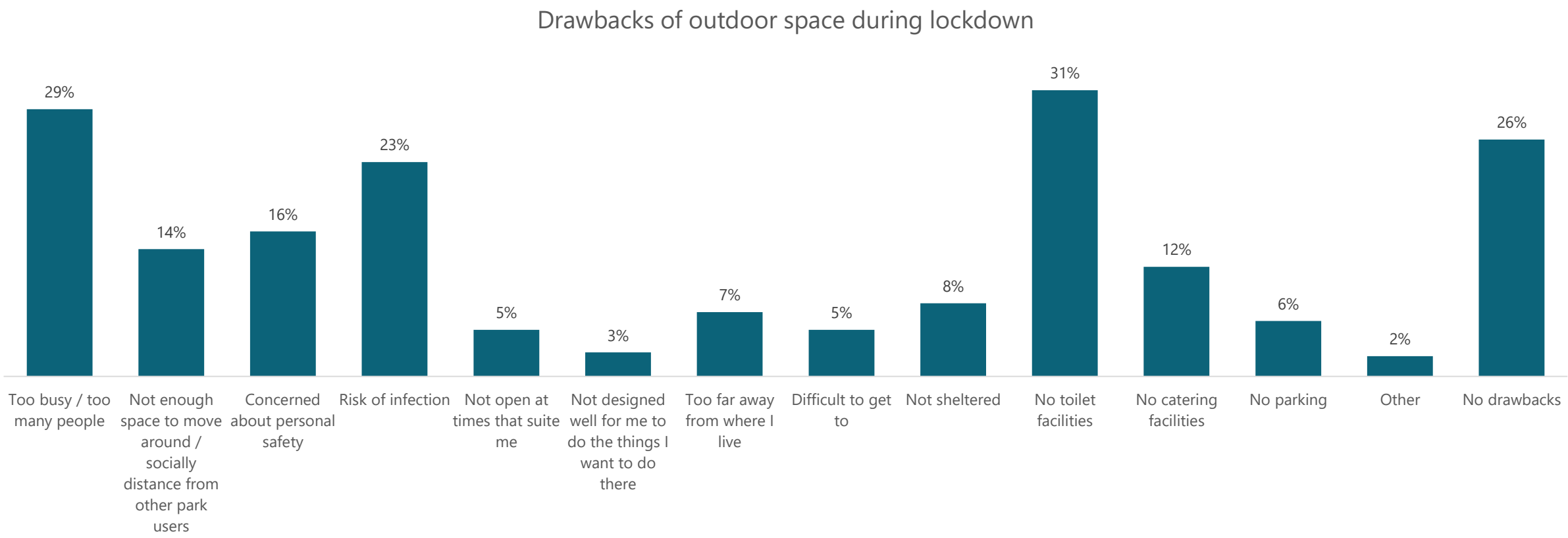
GETTING AWAY FROM PEOPLE IS MARGINALLY MORE IMPORTANT THE SEEING OTHERS



Question: What have been the benefits of using parks and green space through lockdown?
Base: All who used an outdoor space (725)

But, no toilet facilities is an issue

LACK OF TOILET FACILITIES BECOMES MORE OF AN ISSUE FOR THE OLDER AGE GROUPS AND FEMALES



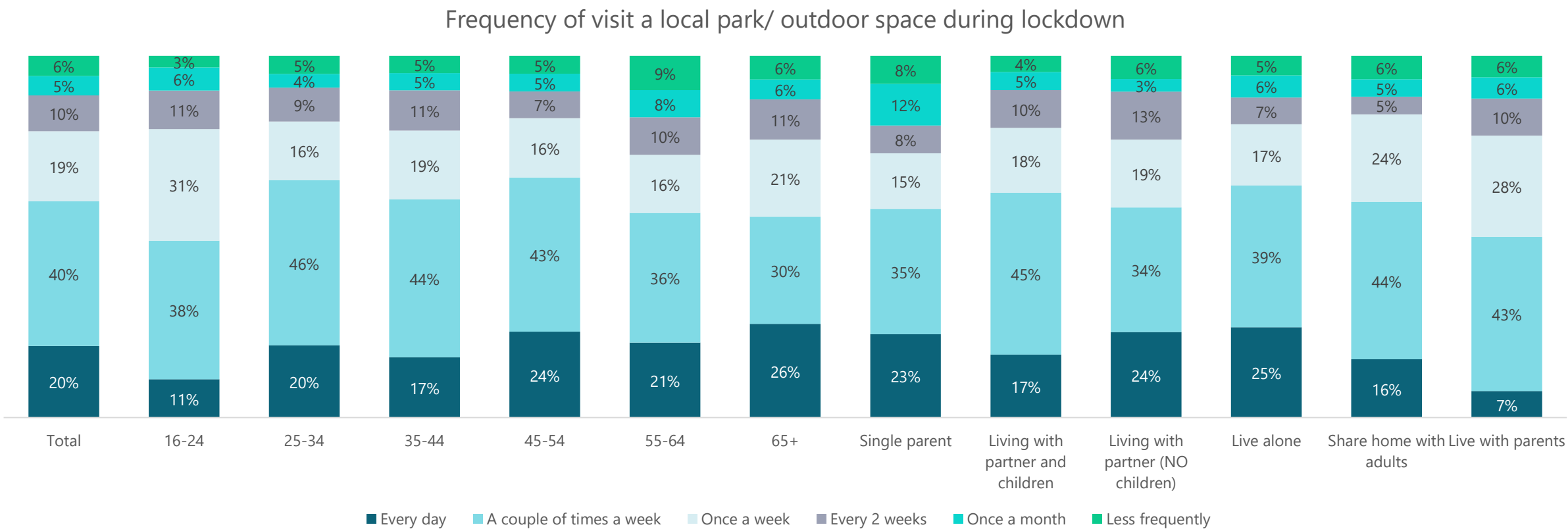
Question: What, for you, have been the main drawbacks of using parks and green space through lockdown?
Base: All who have visited an outdoor space (725)



PARK USAGE

1 in 5 will visit a local park every day. Most frequent visitors are those who live alone

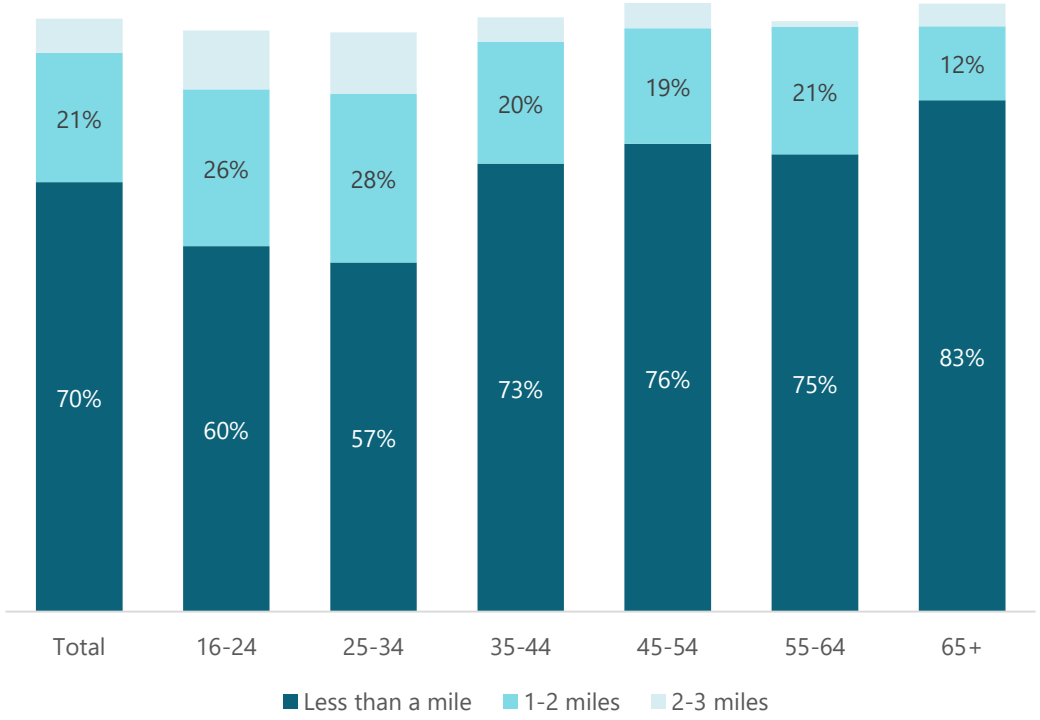
60% WILL VISIT AT LEAST A COUPLE OF TIMES PER WEEK



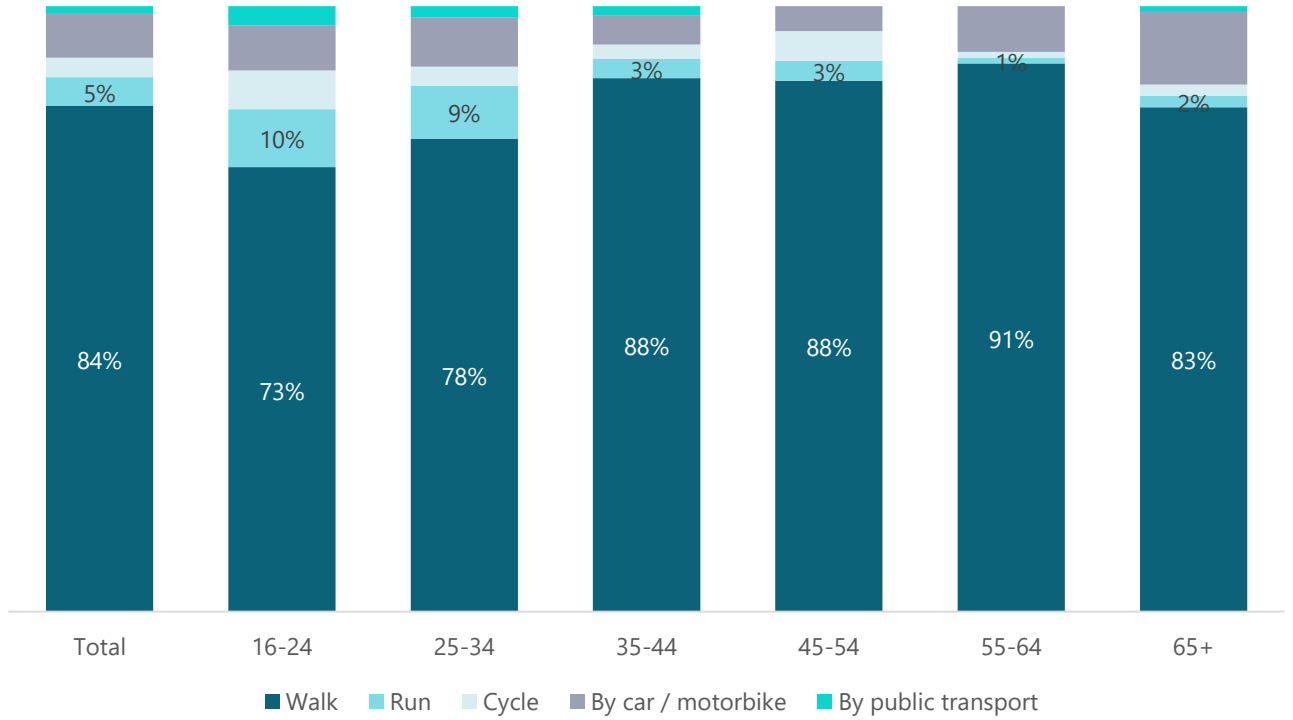
Question: How often have you visited...?
Base: All who visited local park (716)

Vast majority will travel less than 2 miles and will walk or run there

Distance reside from a local park/ outdoor space

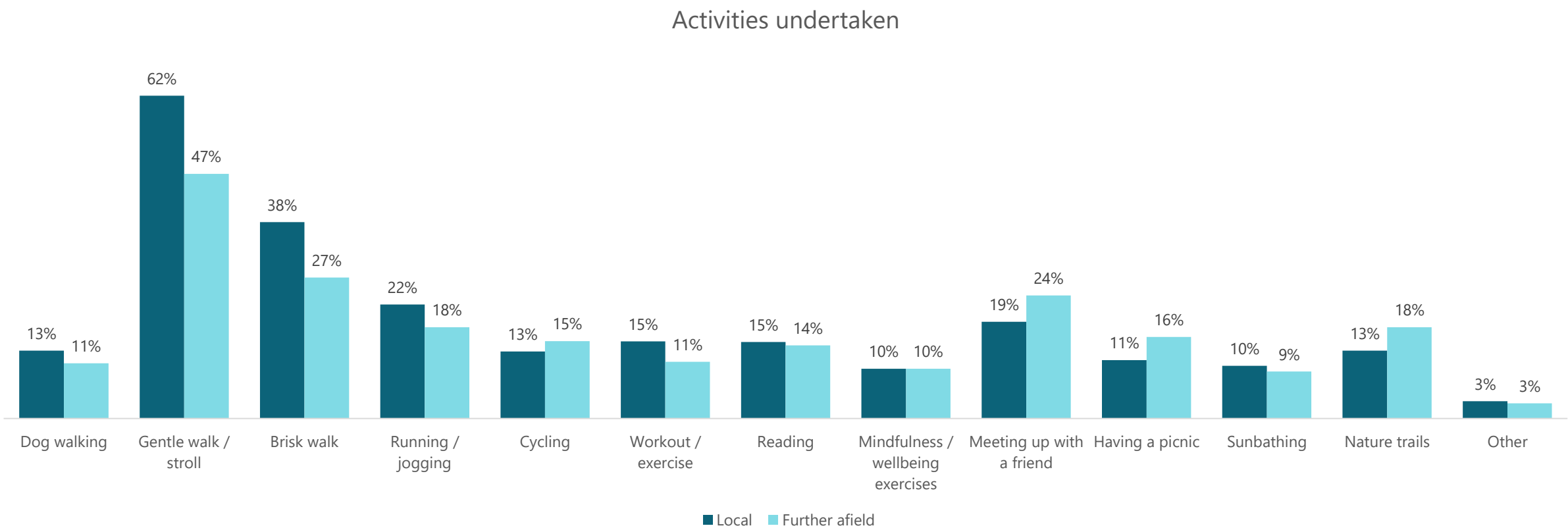


How travelled to a local park/ outdoor space

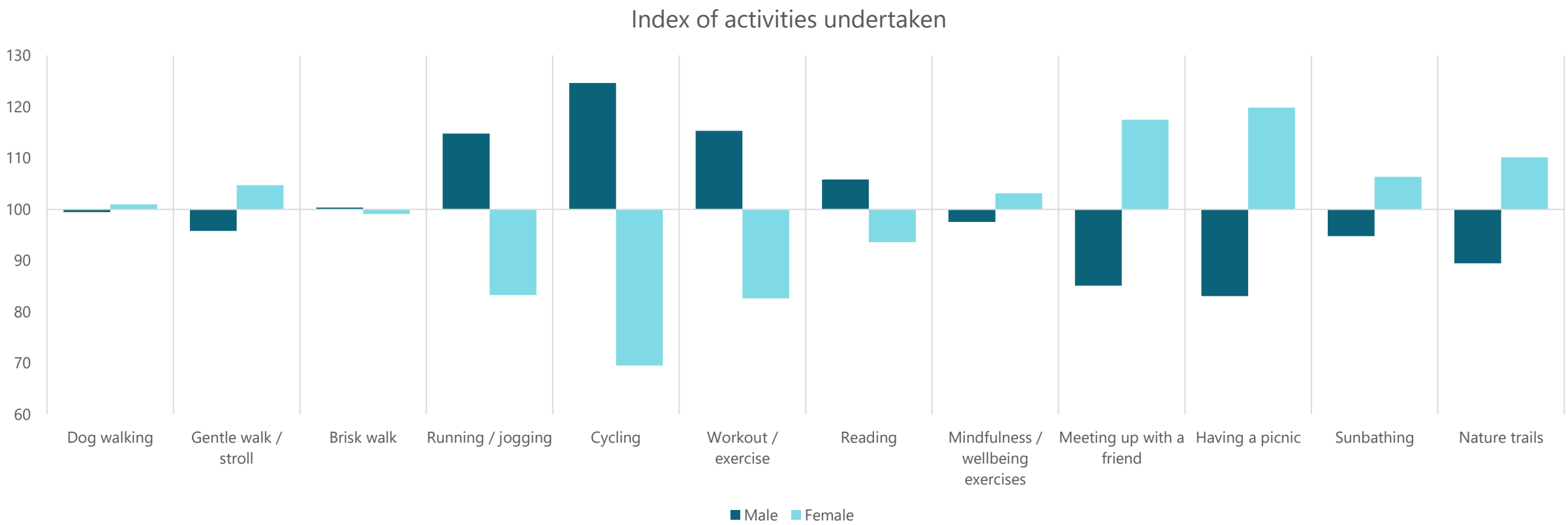


Question: How far do you live from...? / How do you get there?
Base: All who visited a local park (716)

Activities undertaken

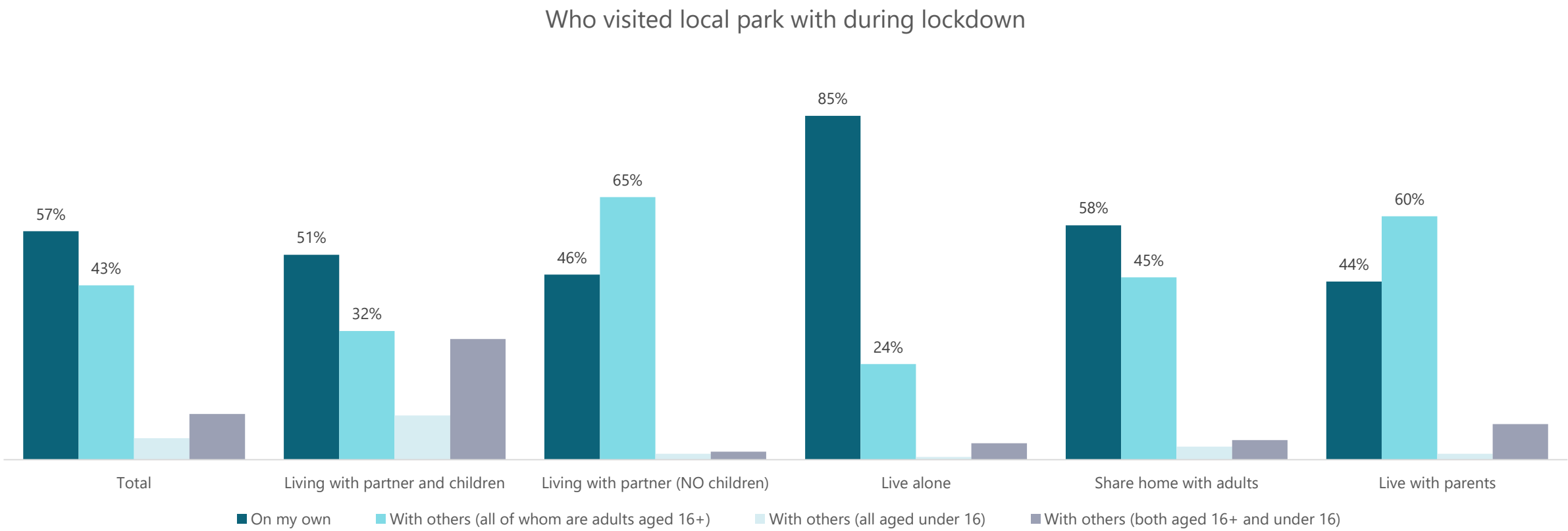


Males are slightly more likely to undertake exercise while females are slightly more likely to socialise at a local park



Who visited with

LIVING ARRANGEMENTS IMPACT WHO THEY VISIT WITH



Question: Who do you visit your parks / green space with?
Base: All who visited a local park (716)

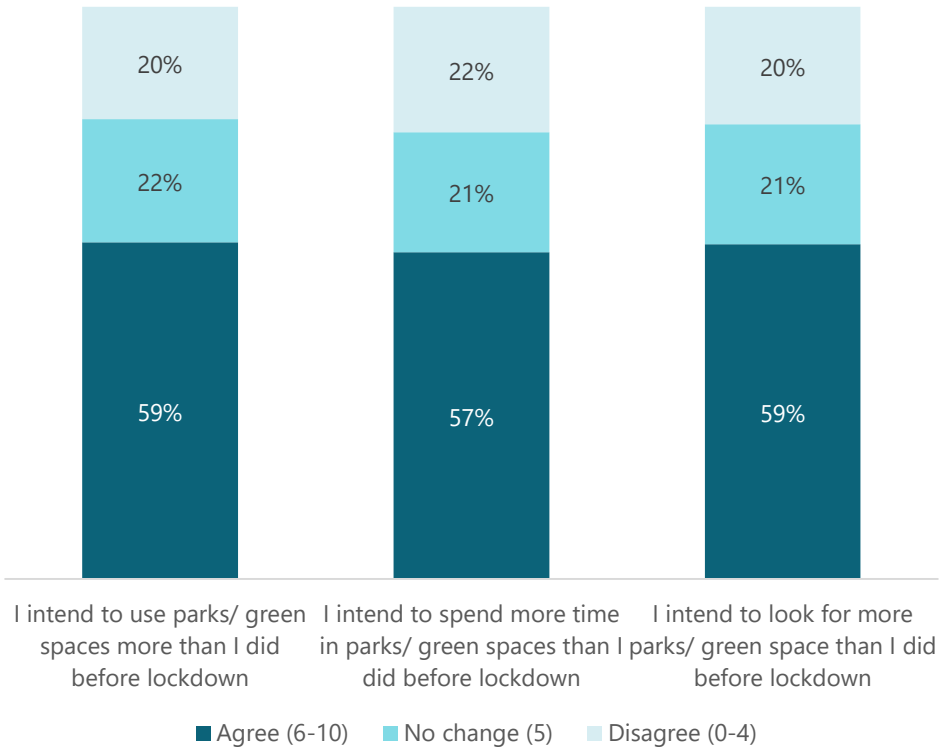


FUTURE INTENTIONS

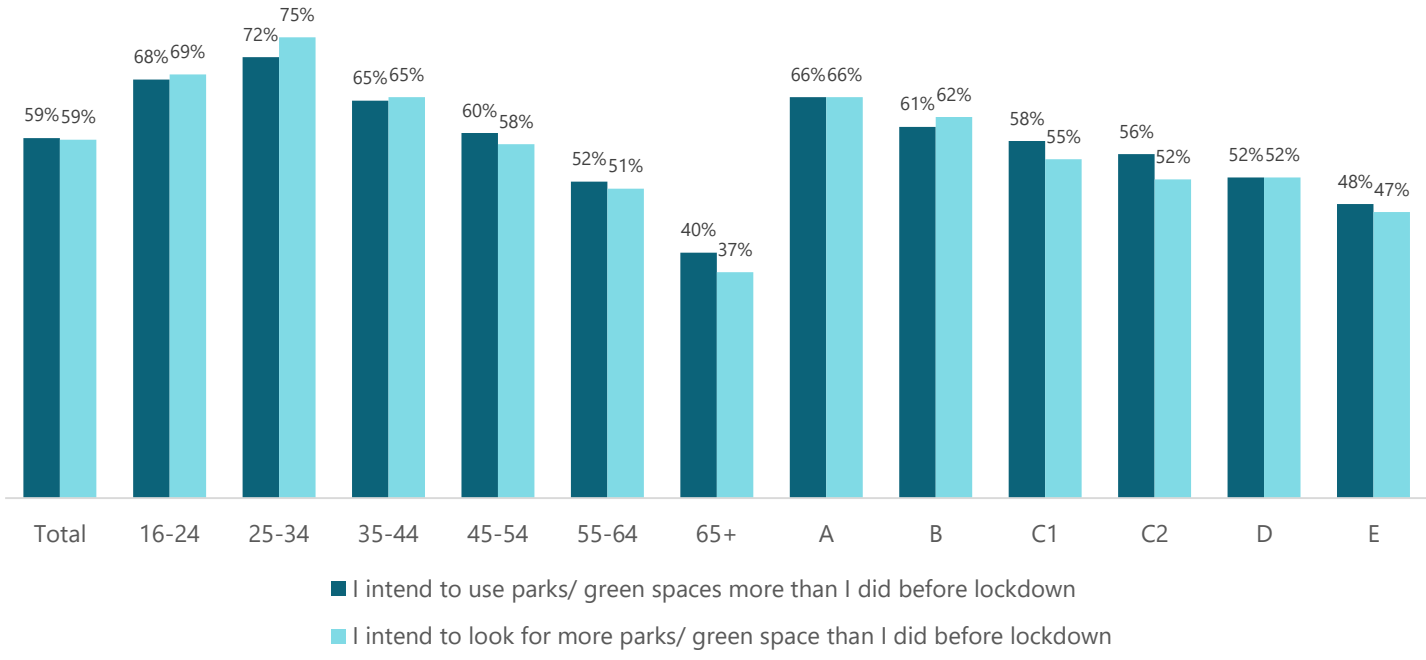
Strong intention to use parks more and visit more parks after lockdown

STRONGER AMONG YOUNGER AGE GROUPS AND HIGHER SEGS (YOUNGER AGES DID DECLINE THEIR USAGE DURING LOCKDOWN)

Impact of use of green spaces on future visits

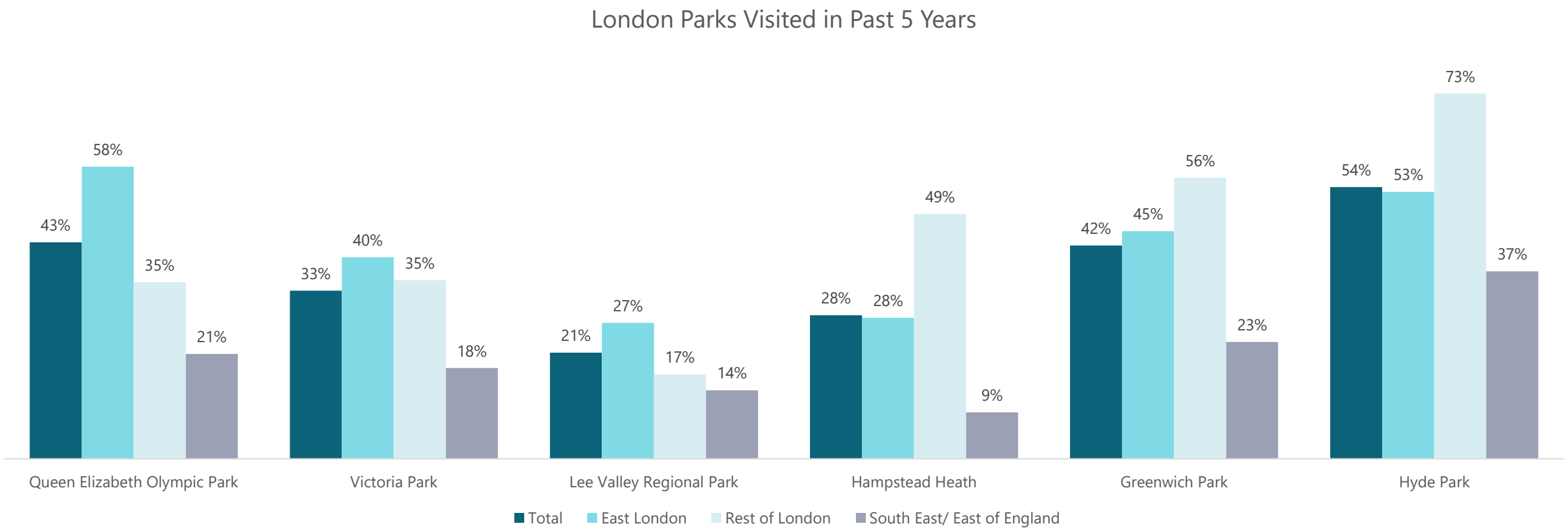


% agreeing with statement



Question: And to what extent do you agree or disagree with the following statements in light of your experience using parks / green space during lockdown?
Base: All respondents (1001)

All parks will attract their local audience. The more central parks and those that host events will attract visitors from further afield.

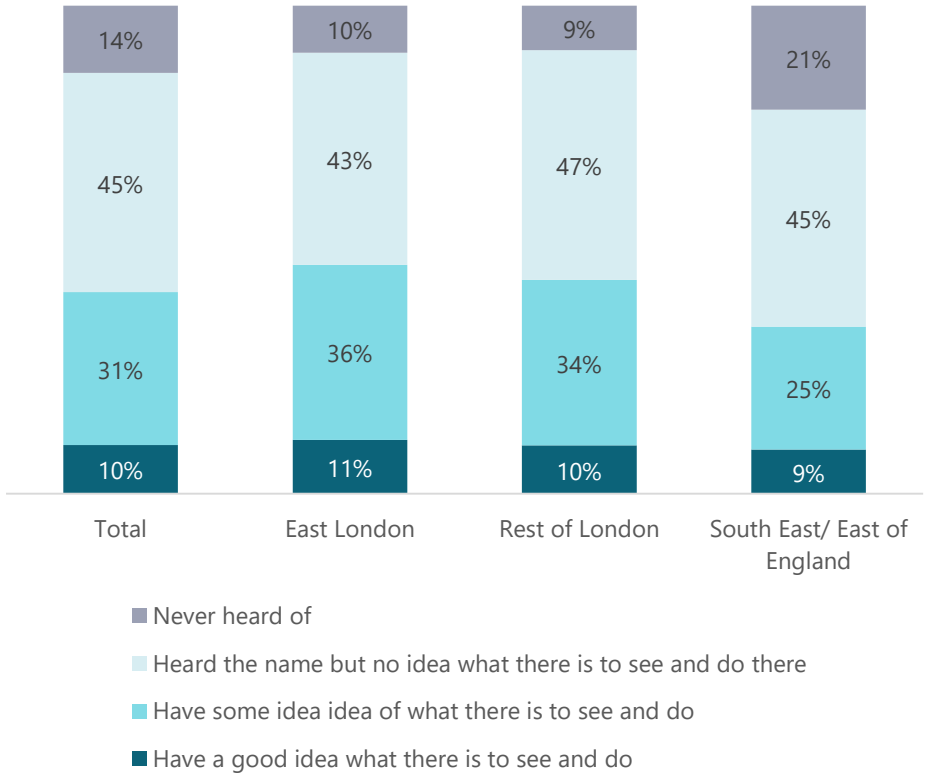


Question: Which of the following places have you visited for **leisure reasons?**
Base: All respondents (1001)

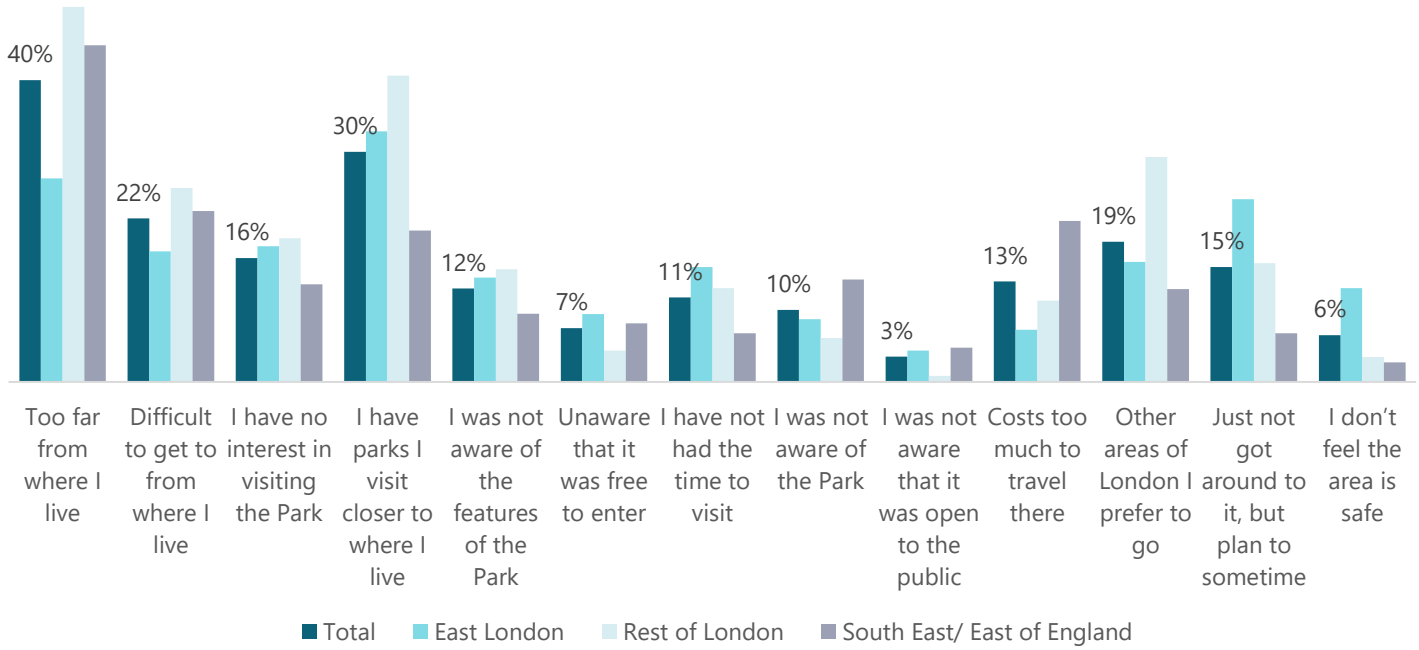
Barriers to visiting are linked with awareness

OVER 50% OF E. LONDONERS DON'T KNOW WHAT THERE IS TO DO THERE

QEOP - Perception among non-visitors

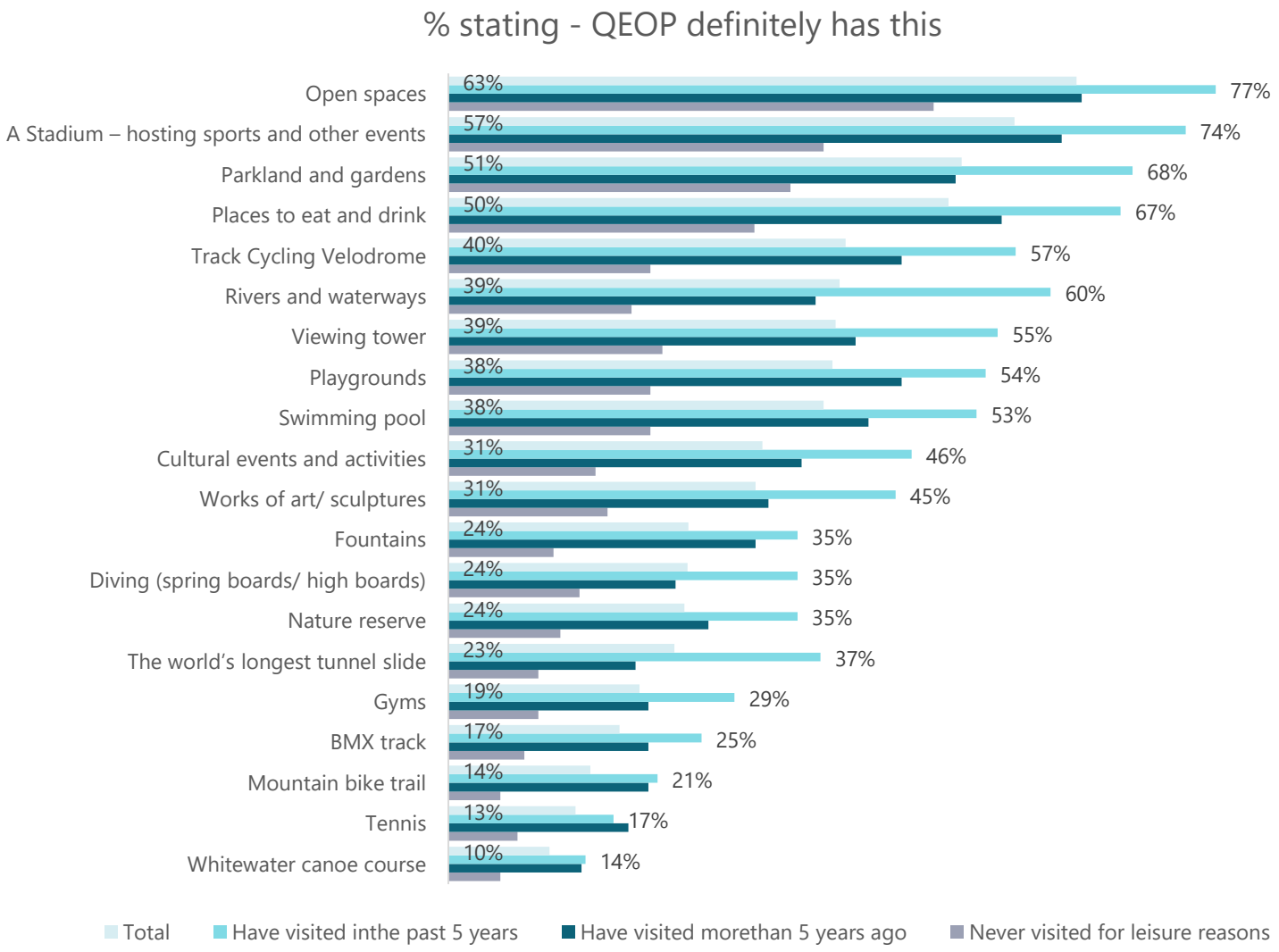


QEOP - Barriers to visiting



Question: Do you know what there is to do or see at these places?/ Which, if any, are reasons for not having visited Queen Elizabeth Olympic Park?
Base: All non visitors (421)

Awareness of the QEOP offer is strongly linked to recency of visit



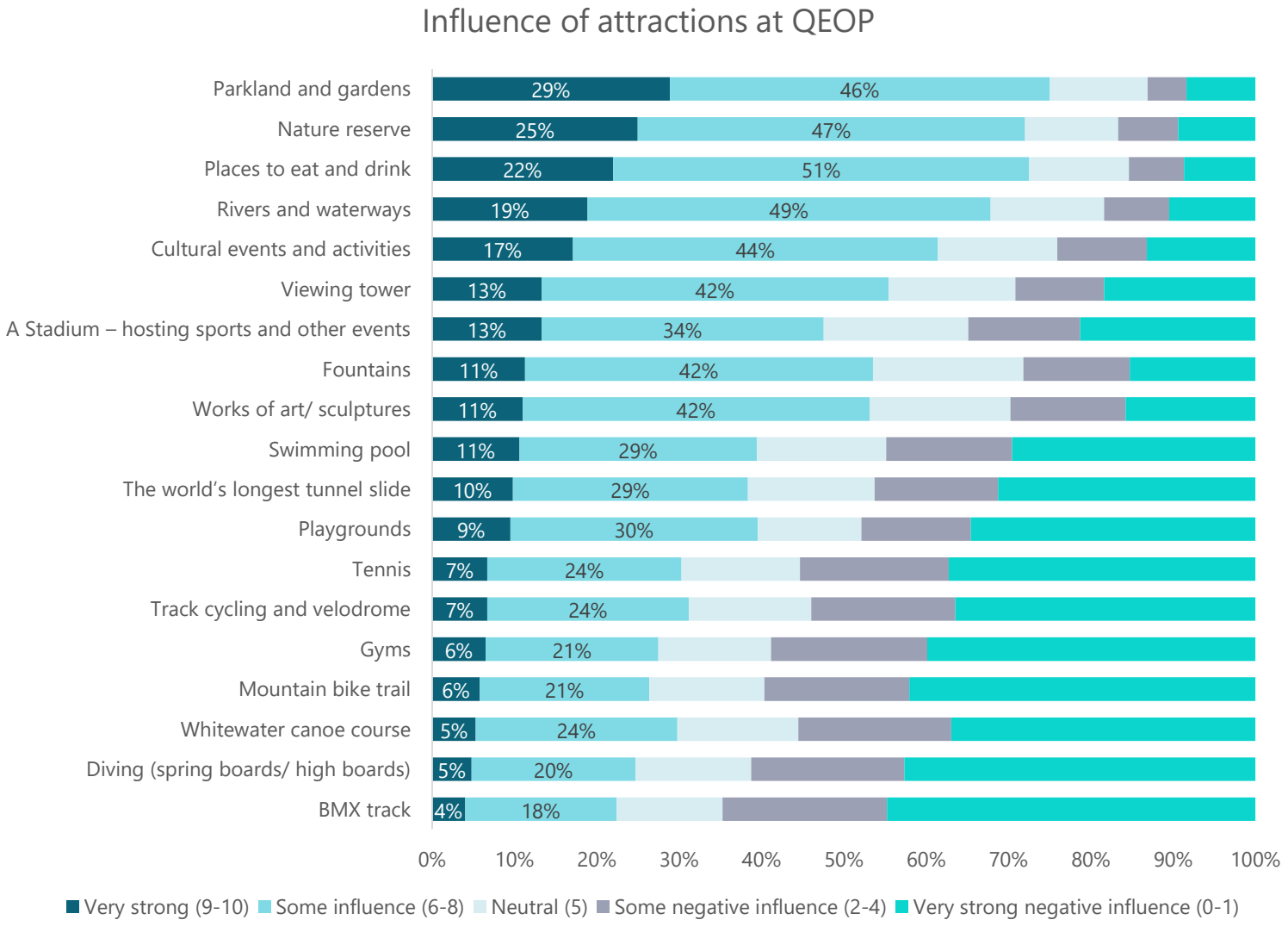
With 'Olympic' and 'Park' in the title, associations will be generated

Open spaces, parklands and gardens are likely to be associated with most parks (49% of people who have never visited state that QEOP definitely has this)

Some of the more specific offerings (AMO, Tunnel Slide, Fountains, Playgrounds, etc) are only really known about among recent visitors

During lockdown, the expectation is more around the open space and walking

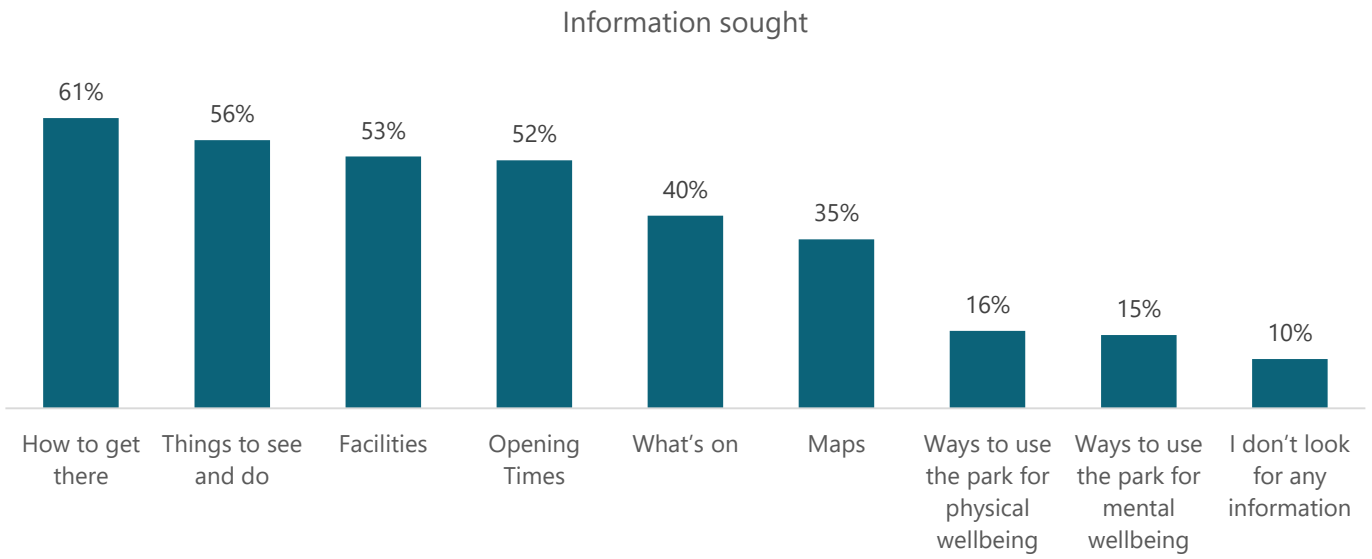
What will attract people to the park?

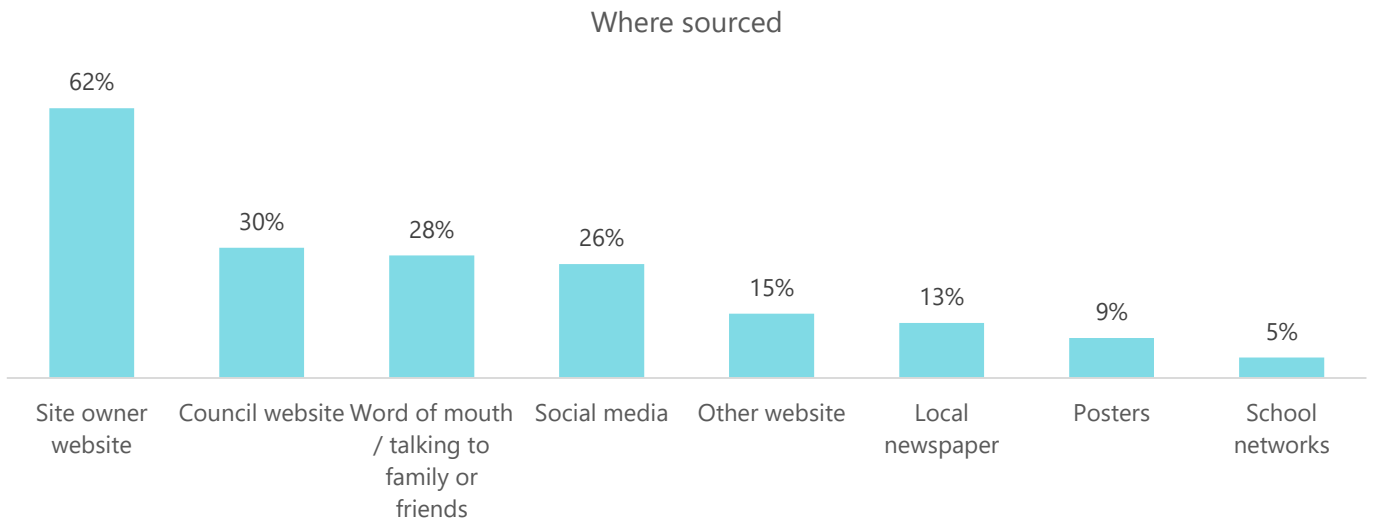


The outdoor space and natural offering has the greatest and most universal appeal

The least appealing elements relate to more niche offerings around sports

Information provision





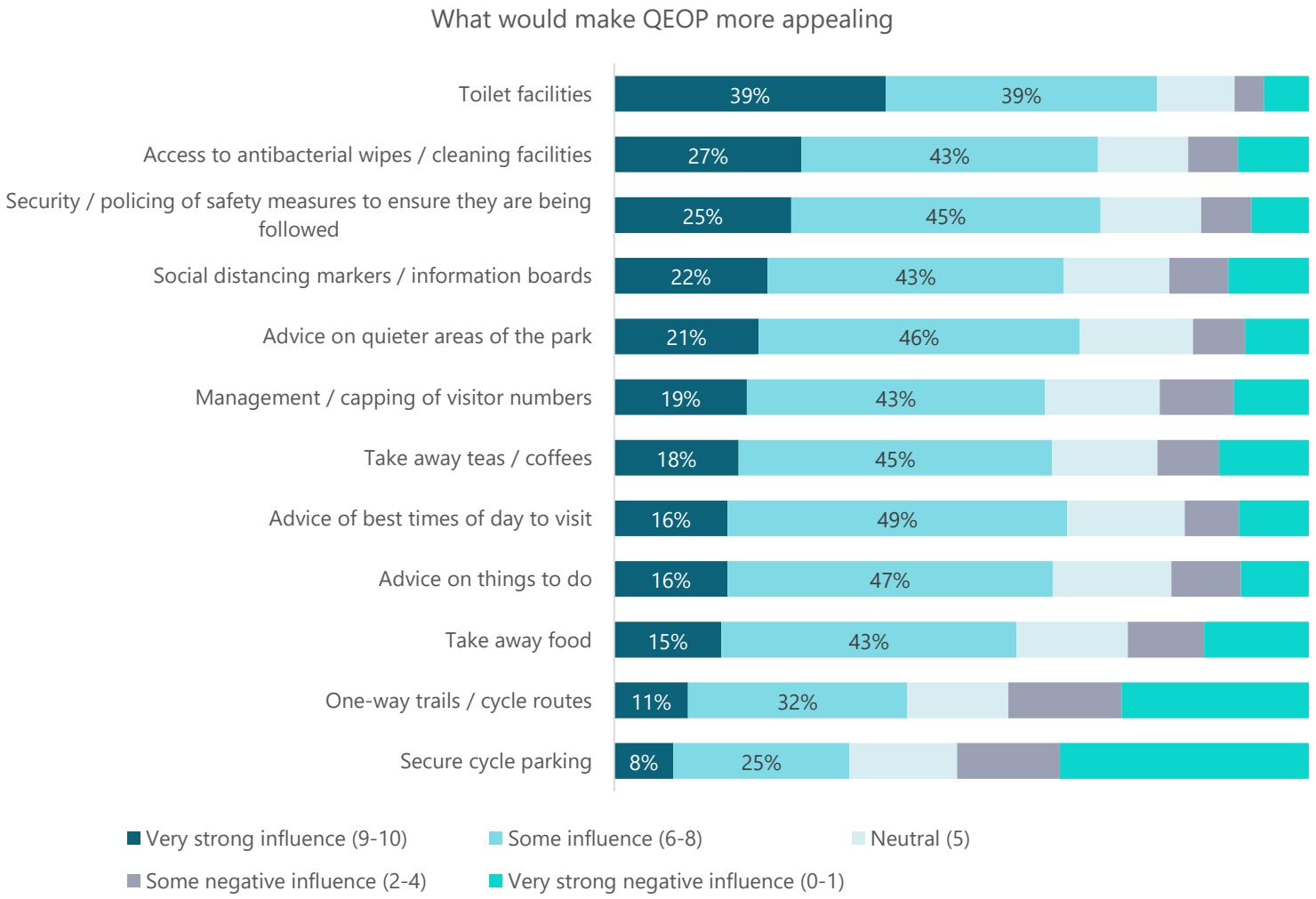
If people are seeking information, it will be functional elements in the main

- How to get there
- What facilities there are
- Opening times

Things to see and do could be functional but there could be an element of inspiration here

Respondents are likely to head to the website for the park directly to get this information

Specific post-lockdown messaging



The key message people will be seeking is 'Our toilet facilities are open!'

Social distancing and 'covid-secure' messaging will still be key

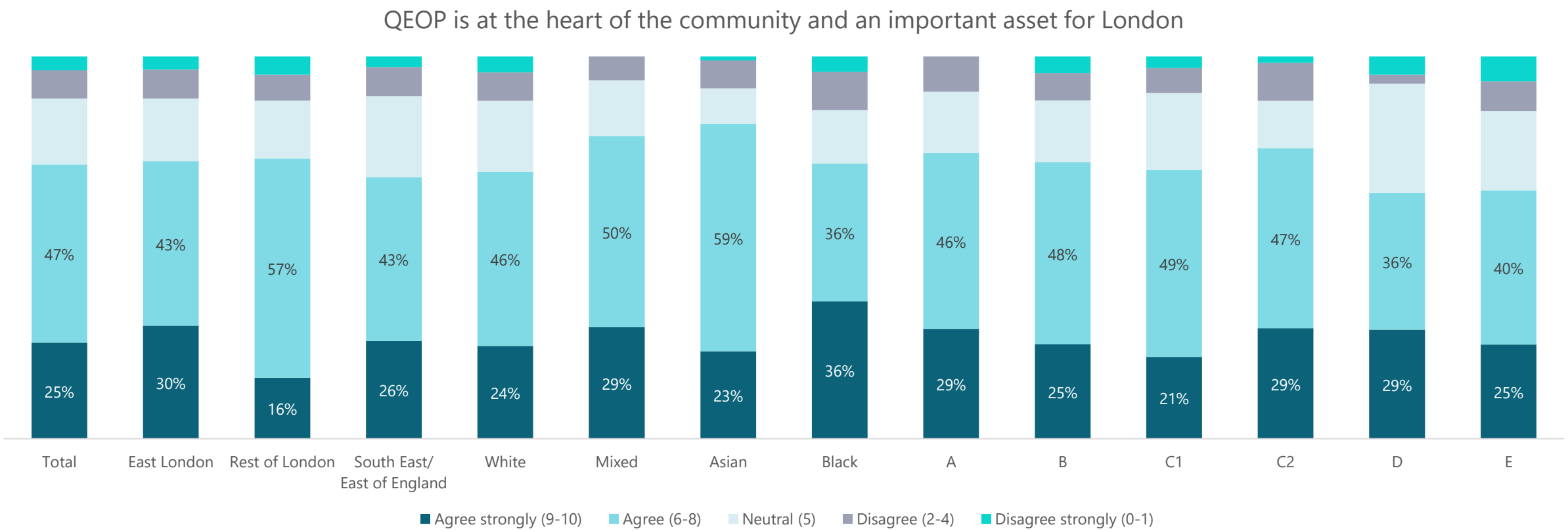
Cleaning facilities/ wipes will be important as will policing of security measures

- Respondents don't think that the public can police themselves?

Highlighting quiet areas and managing numbers will appeal to many

As will highlighting the food and drink options available

Stronger views among the East London residents that QEOP is at the heart of the community and an important asset for London



Question: And finally, to what extent do you agree with the following statement;
Base: All respondents (1001)

Summary

Who should LLDC be targeting?

The local market, or within a couple of miles of the park. This is the distance from within most people will travel without public transport.

Who is most likely to visit?

There is largely universal appeal for an outdoor space. Stronger intentions among the younger age groups. Different messages likely to trigger interest in different groups:

Exercise – males

Socialising – females

Open space/ fresh air – anyone, but particularly those sharing accommodation

What should we be promoting?

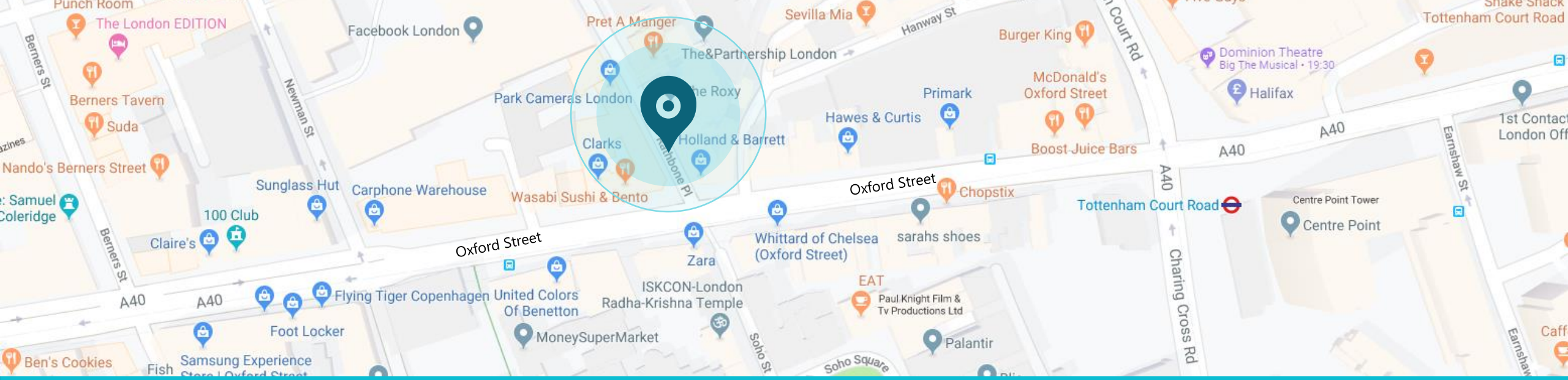
Facilities is key for most people – especially toilets. Options for eating/ drinking would be useful.

Options for trails or routes and things to see can help attract people.

'Covid-safe' – open space, quiet areas, cleaning facilities

Any messaging 'watch out's?

Policing of covid restrictions – people want to see it but could make the park unappealing if people don't feel relaxed



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