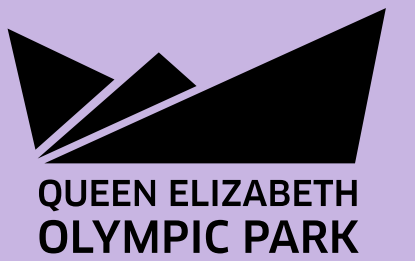


Economic and Social Impact Report

Queen Elizabeth Olympic Park



November 2025



2007



2025



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Foreword

This report offers an independent and comprehensive assessment of the economic, social, cultural and environmental impact of Queen Elizabeth Olympic Park up to the end of 2024. Built on rigorous analysis and wide-ranging engagement with partners across the Park and beyond, it brings together robust evidence with the insight, experience and ambition of the people who have helped shape this extraordinary place. We are grateful to Prior + Partners and to all contributors for their time, expertise and commitment.

The work arrives at a defining moment. As the Park transitions from a decade of major construction to an era focused on long-term stewardship, activation and growth, this report provides a baseline for the future. It highlights the emergence of a dynamic economic sub-region in east London, anchored in what is known as the Legacy Area, where the London Legacy Development Corporation served as the planning authority until the end of 2024.

By the end of 2024, the area generated £3.5 billion in GVA and supported a further £1.8 billion of GVA per year across the Growth Boroughs. Over the same period, 38,300 jobs were created within the Legacy Area, with an additional 17,700 across the Growth Boroughs. Looking ahead there is more growth to come with an additional 13,300 jobs expected within the Legacy Area by 2035, with almost half anticipated to be filled by residents of the Growth Boroughs. By 2035, the Legacy Area is projected to generate £5.5 billion in direct GVA per year.

These numbers tell us a story — that the Park's influence extends well beyond its boundaries. It stands as a major asset for London and the UK, showing how investment, innovation, enterprise, placemaking and community engagement can drive inclusive growth. The lessons learned here about long-term planning, partnership working and social value offer essential insights for other parts of the city and for efforts to stimulate inclusive growth across the country.

Yet the challenge remains: there is more to do to ensure that the economic benefits of growth genuinely improve the lives of east Londoners and that prosperity is shared equitably. We have all of the ingredients to make that happen: London's growth sectors are located here, the diverse talent needed to power those sectors is here in abundance, and we have tried and tested, best practice models of Inclusive Growth delivery ready to be scaled. We know that sustained, targeted effort is needed to expand access to quality jobs, reduce disparities in education and health, and ensure that local communities directly benefit and we are committed to that endeavour.

In setting out the drivers and conditions that enabled our successes to date, highlighting where there is still more work to do to achieve the impact east Londoners deserve, and providing insight into where further opportunity lies, this report serves as a springboard for the Queen Elizabeth Olympic Park Framework for Inclusive Growth. We hope this report strengthens shared understanding of the Park's achievements and builds excitement for the next phase — one in which Queen Elizabeth Olympic Park continues to evolve, inspire and lead innovation, talent, opportunity and inclusive growth for east London, the capital and beyond.



Simon Blanchflower CBE

Deputy Chair, London Legacy
Development Corporation



01 Context



Introduction

Marking the start of a new era for the Queen Elizabeth Olympic Park

Viewed by an estimated 3.6 billion people around the world, the London 2012 Olympic and Paralympic were overwhelmingly seen as a great success. However, like all major sporting events, concerns were raised over the ability to justify the investment. Since the decision was made to bid for the 2012 Game, hosting was seen as an opportunity for London to create a lasting positive social, economic, and environmental impact for both current and future generations.

Established as England's first Mayoral Development Corporation (MDC) in 2012, the London Legacy Development Corporation (LLDC) was created by the Mayor of London as the vehicle to fulfill commitments and realise the opportunities presented of the London 2012 Olympic and Paralympic bid.

Queen Elizabeth Olympic Park Strategy to 2025

The Queen Elizabeth Olympic Park (QEOP) is located in east London, four miles east from the city. It sits across the four London Boroughs of Newham, Tower Hamlets, Hackney and Waltham Forest, termed as the Growth Boroughs. LLDC has worked alongside the four Growth Boroughs and other Park partners to fulfill its responsibility to deliver a positive and lasting legacy for the communities of east London.

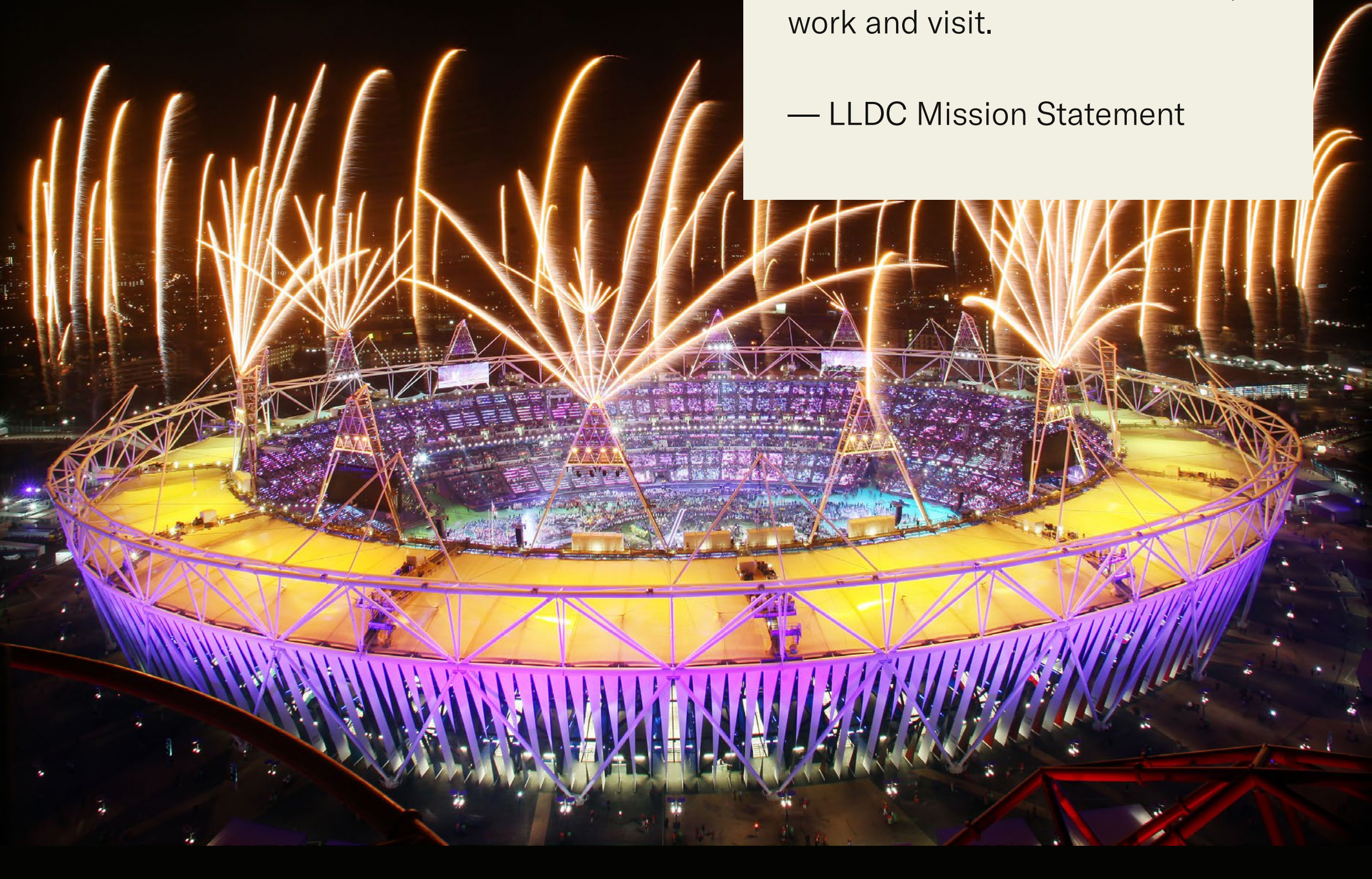
In December 2024, LLDC's town planning powers and functions were returned to the four neighbouring Growth Boroughs. This marked the start of the end of QEOP's current phase of development which has focussed on the post-Games transformation. This milestone has presented LLDC with the opportunity to reflect on its current achievements, whilst also looking ahead at the Park's future potential.

QEOP during the 2012 Games →



To use the opportunity of the London 2012 Games and the creation of Queen Elizabeth Olympic Park to change the lives of people in east London and drive growth and investment in London and the UK, by developing an inspiring and innovative place where people want—and can afford—to live, work and visit.

— LLDC Mission Statement



Overview of this commission

To mark the start of a new phase for QEOP, which focuses activation and optimisation, LLDC have commissioned Prior + Partners, alongside Future Places Studio, to independently assess the economic and social impacts of the Park. The purpose of the study is to recognise the impact QEOP has had on local communities, London’s economy, and the environment.

The objective of this report is to examine the current economic and social impact of activities at QEOP since 2012, to date. Whilst also reflecting on what has created the conditions to drive impacts. The study also looks at the future potential impacts at QEOP, which are yet to be realised.

This study sits alongside **LLDC’s Framework for Inclusive Growth**; which sets out a shared vision for delivering a legacy of inclusive growth through a focus on the Park’s assets, east London’s diverse talent and the health and wellbeing of local communities

Approach to study

The methodology developed for the Study draws on best practise economic and social impact and evaluation techniques. It utilises a mix of primary and secondary research and quantitative and qualitative analysis to quantify impacts (wherever possible), whilst reflecting on the drivers of these impacts. Findings have been informed by extensive engagement undertaken through interviews and working groups with a range of stakeholders including LLDC staff (past and present), Growth Boroughs, local businesses and Park stakeholders, and numerous reports and studies. The Study has been shaped through an in-depth understanding of LLDC’s 2030 Vision and Strategic Objectives for QEOP, which are used to guide all decision making:

- **Community:** An attractive and inspiring place where people come together to achieve great things.
- **Inclusive Growth :** A place which attracts investment, enhancing local lives and national economic growth.
- **Opportunity:** A place where local talent is celebrated, and the benefits of regeneration can be shared by all.

Study geography

When assessing impact, it is important to acknowledge that major regeneration projects influence multiple spatial geographies. This report focuses on four key spatial levels, which are consistently referenced throughout:

- **‘QEOP’, or ‘the Park’:** This is defined as the core parkland area, including the Park’s venues, Lee Valley Regional Park Authority venues and assets operated by LLDC.
- **‘Legacy Area’:** This is the core study area which includes the Park as well as the surrounding neighbourhoods, aligning with the LLDC planning authority boundary (up until December 2024).
- **‘The Growth Boroughs’:** The four London Boroughs that the QEOP sits across—London Boroughs of Newham, Tower Hamlets, Hackney and Waltham Forest.
- **‘London’:** Defined as Greater London.

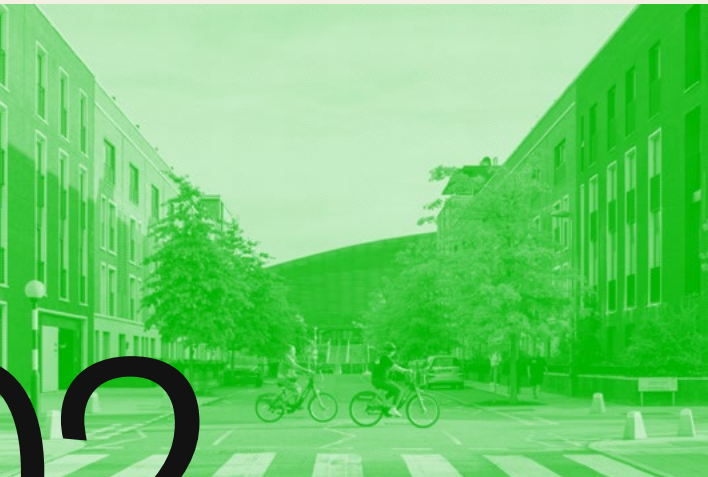
This report reflects on the direct benefits, but as highlighted throughout, the impacts of large scale regeneration extend widely and over a long time period, and as such it is not always possible to disentangle these from wider occurrences in the economy and society. More detailed methodology and assumptions on the economic impact assessment, including the statistical geography are set out in the Annex.



01

Context

Providing a short overview on the history of the Park and how it has established today.



02

Impacts to date

This represents the main body of the report, and is structured around six impact themes. The impact themes have been shaped from an in-depth review of LLDC strategic objectives and vision, and evolved through an understanding of multi-dimensional areas of impact. The impact themes are as follows:

- 1 Economic impact and inclusive growth
- 2 Successful and connected communities
- 3 An asset for the community
- 4 Innovation and the business environment
- 5 Visitor destination, culture and sports
- 6 Environment and sustainability



03

Looking forward

Recognising that QEOP still is part way in its development lifecycle, the report considers impacts that are yet to be realised and achieved to 2030, with a focus on future pipeline of developments; including East Bank.



04

Reflections

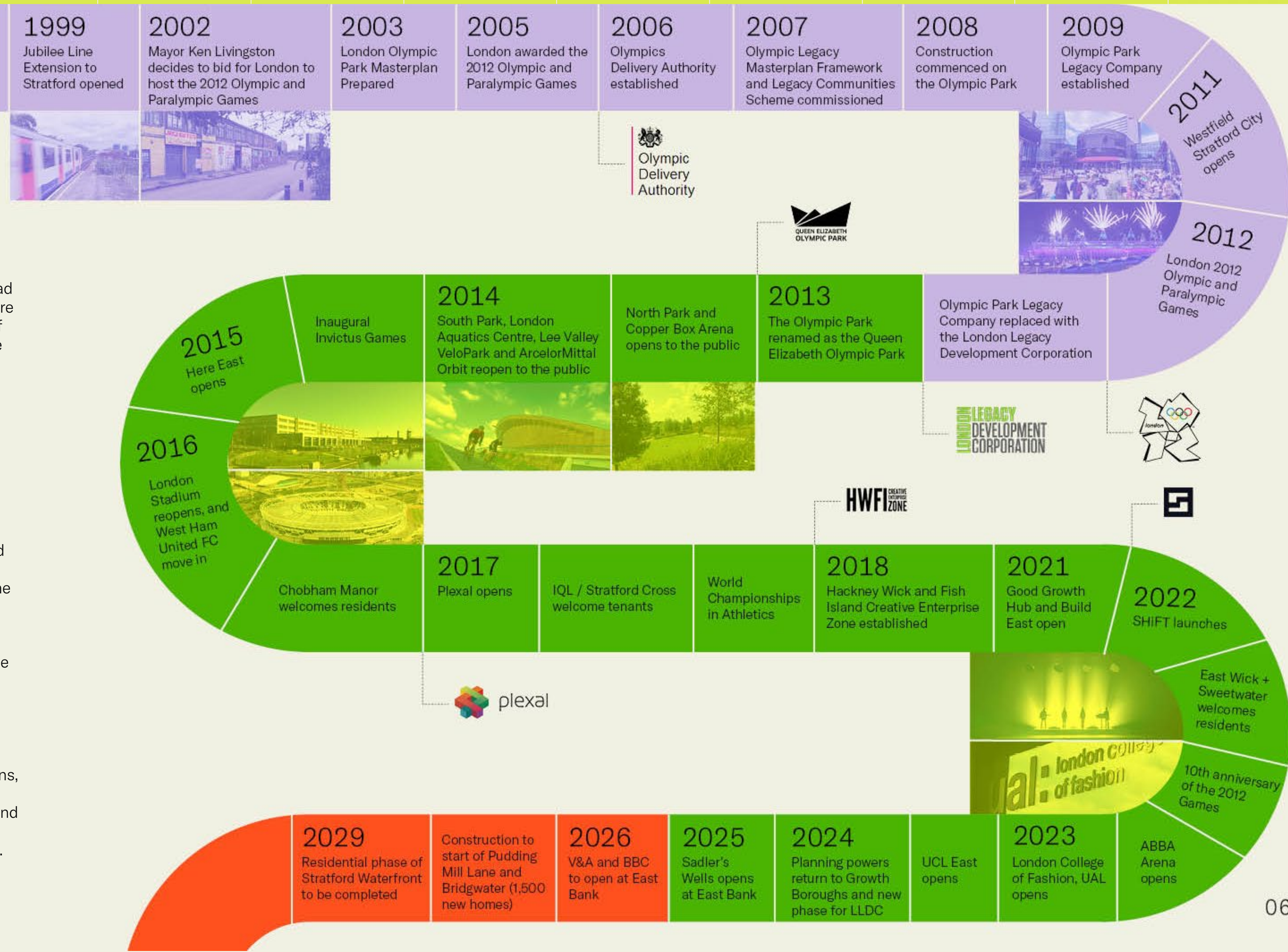
Summarising the ‘conditions for success’ and a short conclusion.

Then & Now

Prior to the 2012 Games, Stratford and the surrounding area was made up of underutilised industrial sites and contaminated land. The area had suffered from industrial decline following the closure of the Royal Docks, which led to increased levels of economic and social deprivation. At the start of the millennium, the decision was made to bid for the 2012 Games. A key theme of the UK's bid was the pledge to "create an extraordinary legacy" through the regeneration for east London.

Awarded the 2012 Games by the International Olympic Committee in 2005, over 200 hectares of brownfield land and waterways were transformed. The 2012 Games presented an opportunity to deal with infrastructure issues and accelerate regeneration in the area. The LLDC was established in 2012 and handed landownership and responsibilities for overseeing and implementing the legacy transformation of the QEOP.

Both the North Park and South Park were rapidly reopened after the Games, whilst venues have since been adapted and repurposed into multi-purpose community assets and sporting venues. A series of new mixed-use communities and flexible business spaces have also been delivered across the Park. LLDC has successfully attracted world-leading universities, national and multi-national corporations, and professional sports teams to locate at QEOP alongside new communities, social infrastructure and business incubators. QEOP is now seen as a place for local residents, visitors and businesses to enjoy.



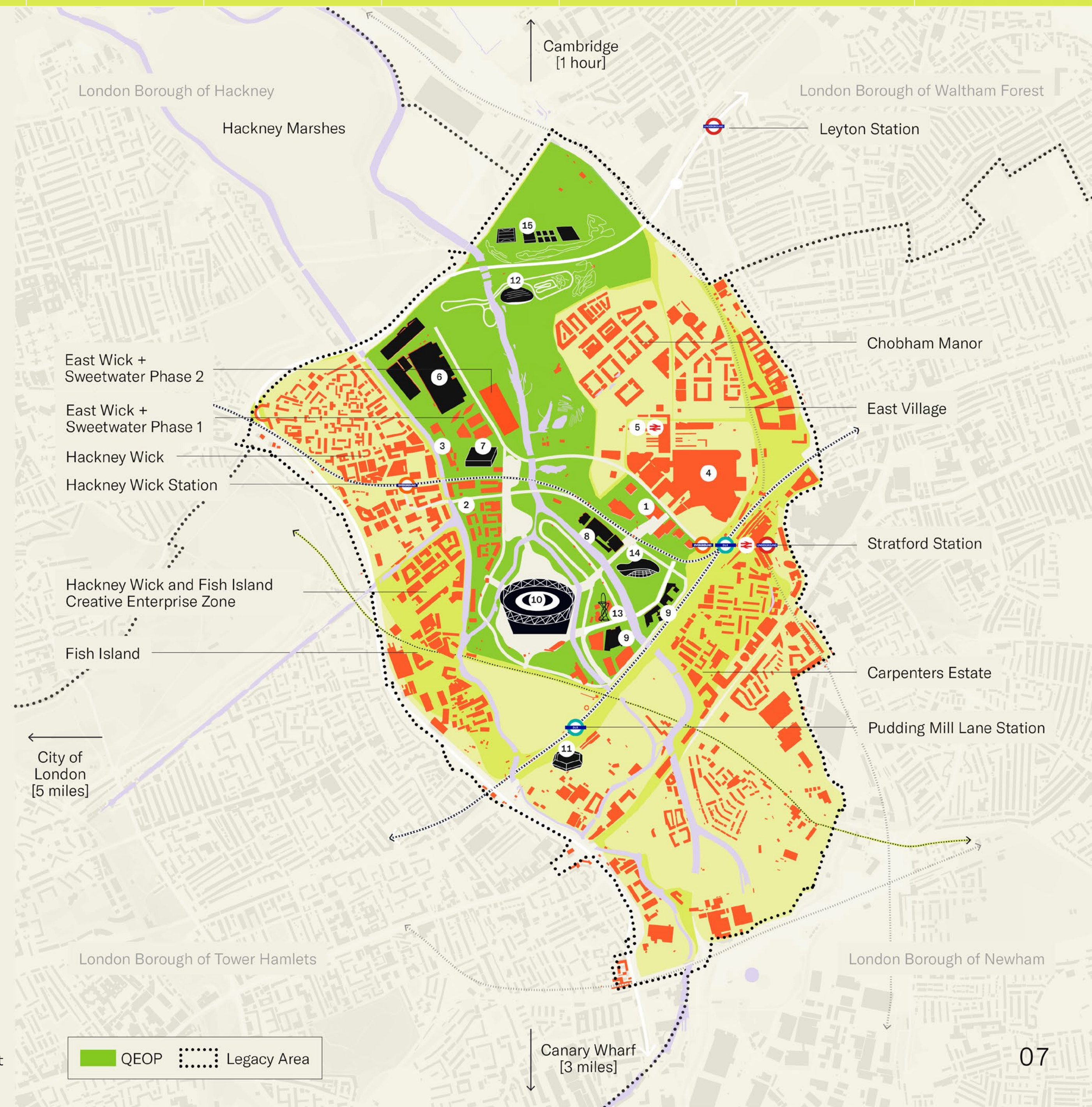
Today

The Queen Elizabeth Olympic Park has become a new part of city in the heart of east London

Following the execution of its Legacy Masterplan Framework, a delivery-focused masterplan for the remaining ‘development platform’ spaces left after the removal of temporary venues and significant back-of-house areas that serviced the Games, QEOP has delivered a series of vibrant new communities. Located in the lower Lee Valley and covering an area of **226 hectares**, equivalent to approximately **552 football pitches**, the Park crosses the boundaries of the four Growth Boroughs (Newham, Hackney, Tower Hamlets and Waltham Forest). It is integrated through new infrastructure with its legacy communities in Hackney Wick, Bow, Leyton, and Maryland. Lee Valley Regional Park Authority (LVRPA) is a major landowner, managing one third of the parkland and two major venues at QEOP.

Today, QEOP is at the heart of a Metropolitan Centre for east London with the Legacy Area home to **38,400 people** and **attracting over 20 million visitors per year**. Stratford Station, located within the Legacy Area, is the 5th busiest station in the UK, handling **over 128 million passengers** annually. Venues from the 2012 Games have been repurposed, while new institutions, cultural attractions, and business and innovation spaces have been introduced to further enhance the area, resulting in QEOP being recognised by the New York Times as one of the top 52 places to visit in 2025.

- 1 Stratford Cross
- 2 Build East
- 3 Good Growth Hub
- 4 Westfield Stratford City
- 5 Stratford International
- 6 Here East
- 7 Copper Box Arena
- 8 East Bank: Stratford Waterfront
- 9 East Bank: UCL East
- 10 London Stadium
- 11 Abba Arena
- 12 Lee Valley VeloPark
- 13 ArcelorMittal Orbit
- 14 London Aquatics Centre
- 15 Lee Valley Hockey & Tennis Centre





02

Impacts to date



Economic impact and inclusive growth

[1]

The Legacy Area supports 82,500 jobs across the UK and contributes over £7.9 billion to the national economy.

[2]

Employment and GVA growth has outpaced both the surrounding boroughs and London.

[3]

Cultural assets, the Creative Enterprise Zone, and universities are supporting a growing cluster of creative industries.

[4]

LLDC has successfully utilised its developments, assets and partnerships to support convergence, with an increased focus on sharing benefits more equitably.

[5]

LLDC has used its powers to improve working practices, whilst creating construction employment and training opportunities for London's next generation of built environment professionals.

[1]

The Legacy Area supports 82,500 jobs across the UK and contributes over £7.9 billion to the national economy.

The original mission post-Olympics was for QEOP “to change the lives of people in east London and drive growth and investment”. Although investment in east London would have occurred in any event, it is clear that QEOP has played a major part through the creation of a new part of city that has driven significant economic growth across a wider geography over a short period of time. Through partnerships and collaboration, QEOP has created a culture of promoting inclusivity and diversity which also generates a notable economic contribution.

QEOP has become an area of regional and national economic significance, with economic activities located within the Legacy Area currently supporting **38,300 direct Full Time Equivalent (FTE) jobs**. This employment includes the roles created within the Park’s assets and venues, as well as adjacent employment locations such as Westfield Stratford City and Hackney Wick. This employment directly generates **£3.5 billion** of Gross Value Added (GVA), which is widely used as a measure of economic performance and defined as the value generated in the production of goods and services, contributions to the UK’s economy each year. The positive economic impacts generated in the Legacy Area also extends into Greater London and elsewhere in the UK through associated supply-chain spending (indirect)

and resulting consumer spending (induced). The economic activities across the Legacy Area currently generates a further **17,700 FTE jobs** in the Growth Boroughs and **26,500 FTEs jobs** elsewhere in London and across the UK. This current level of indirect and induced employment generates a further **£1.8 billion** in GVA for the Growth Boroughs and a further **£2.7 billion** across London and elsewhere in the UK each year (2024 prices). Across national supply-chains and through increased spending, the Legacy

Area currently supports **82,500 FTE jobs** in the UK, which generates **£7.9 billion in GVA** for national economy annually.

The annual gross earnings of those directly employment across the Legacy Area was estimated to be **£1.8 billion** in 2024. Much of these earnings are spent within the Growth Boroughs and London, generating a further multiplier effect for the UK economy.

The direct jobs currently within the Legacy Area generate an estimated **£776 million in fiscal benefits** paid towards the public purse through income tax and national insurance contributions each year (2024 prices). As such, the Legacy Area makes a notable contribution to supporting public services, social security and government investments.

[Total]

82,500
FTE jobs

£7.9bn
GVA per year

[London and beyond]

26,500
FTE jobs currently supported outside of the Growth Boroughs in the supply-chain and through spending

£2.7bn
GVA currently generated outside of the Growth Boroughs per year in the supply-chain and through spending per year

[Growth Boroughs]

17,700
FTE jobs currently supported in the Growth Boroughs in the supply-chain and through local spending

£1.8bn
GVA currently generated in the Growth Boroughs per year in the supply-chain and through local spending per year

[Legacy Area]

38,300
Direct FTE jobs currently within the Legacy Area

£3.5bn
Direct GVA currently generated in the Legacy Area per year

Source: Prior + Partners analysis; ONS, BRES; LLDC data;.

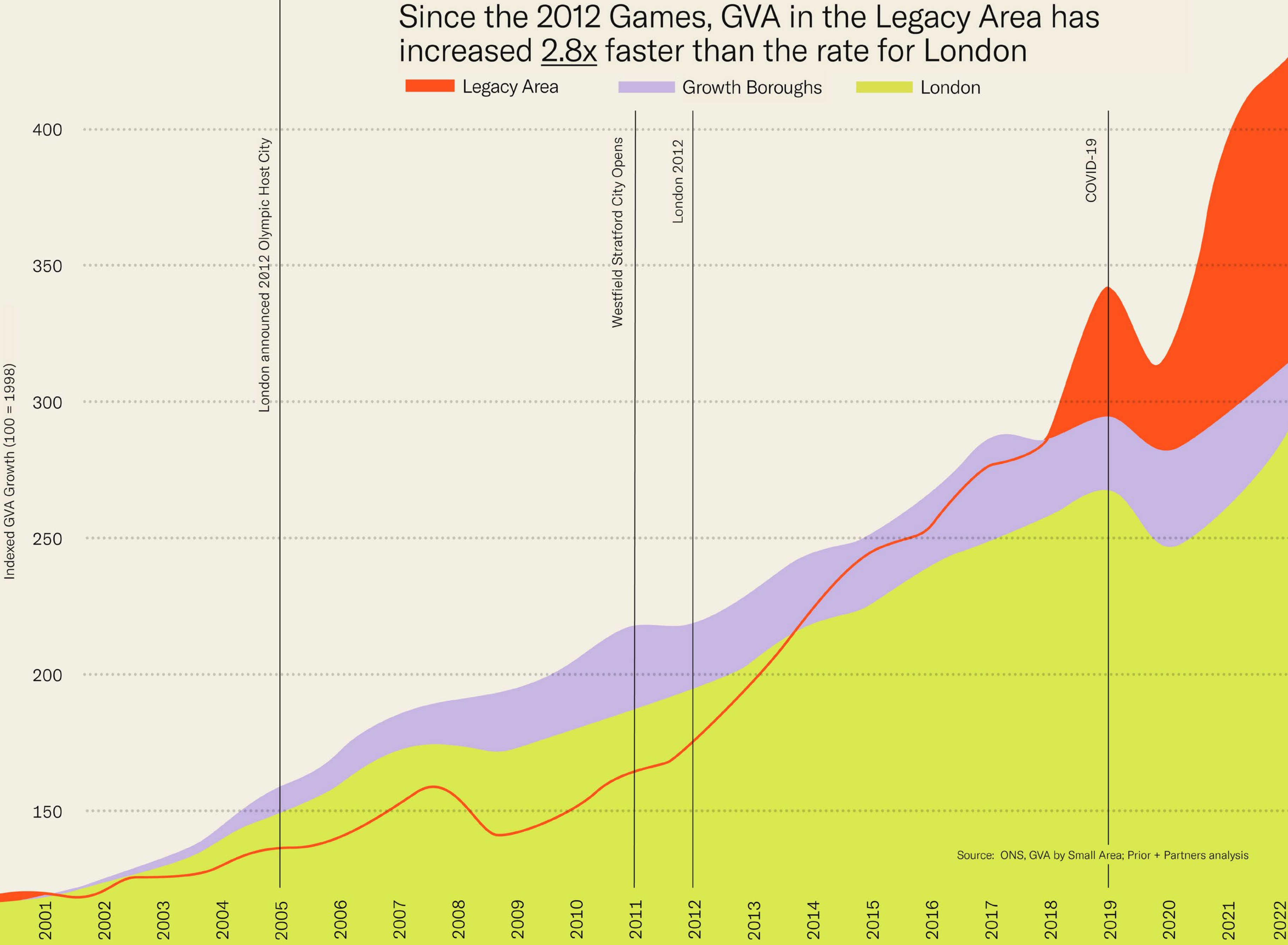
[2]

Employment and GVA growth has outpaced both the surrounding boroughs and London.

The post-games transformation of QEOP has delivered the infrastructure and commercial floorspace that has supported a diverse mix of businesses and employment opportunities in future-facing, high-value and resilient sectors ranging from e-sports and gaming to organic cosmetics.

Since 2012, the number of jobs in the Legacy Area has increased **5.4x** more than the average rate for London, **9.0x** more than the average rate for England, and more than any London Borough since 2015¹. Such a significant rate of growth has been achieved through the actions of the MDC working with partners, which has delivered the infrastructure and initiatives to facilitate GVA growth which has exceeded the rate for London and any London Borough since 2012.

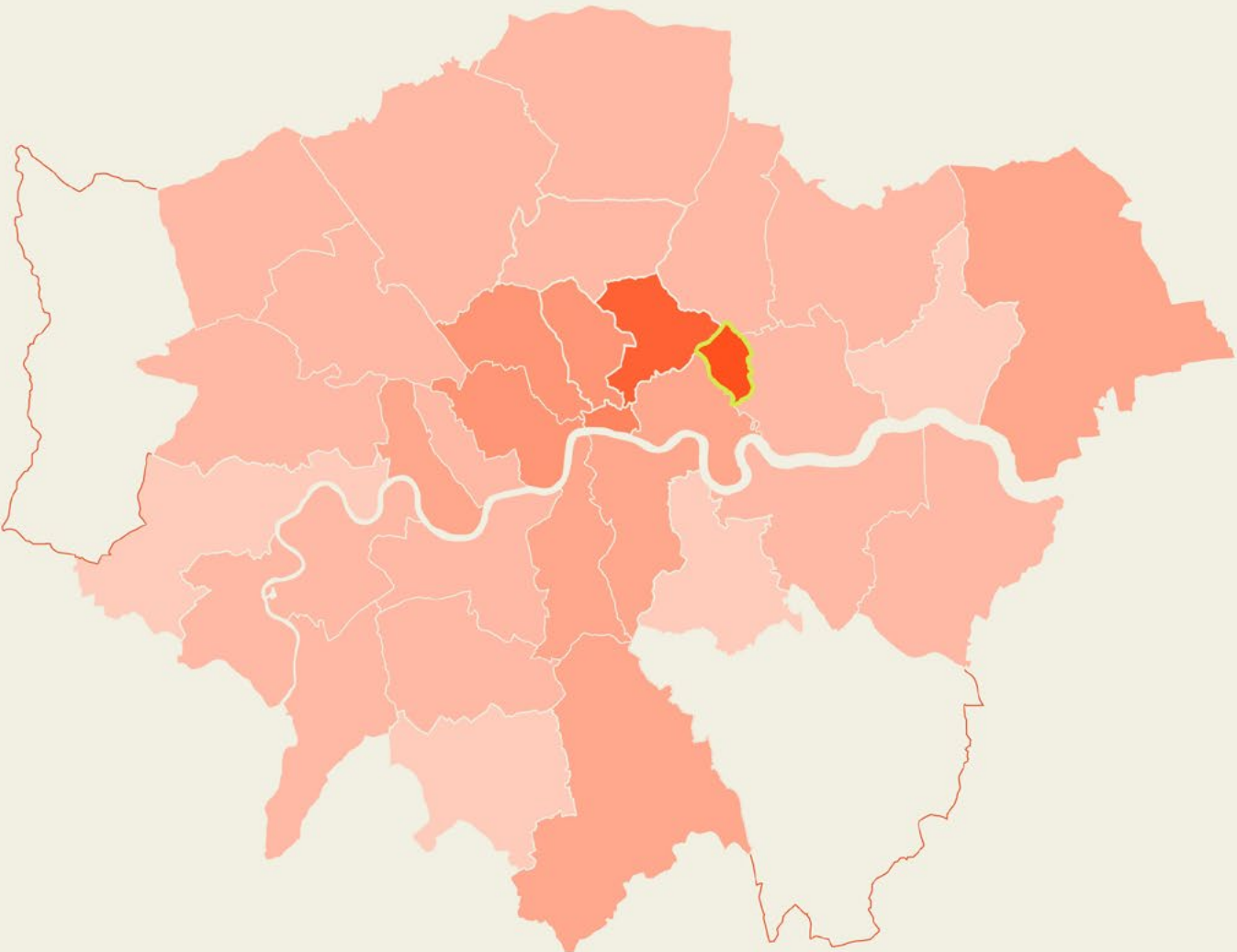
Infrastructure delivered across the Legacy Area, coupled with the wider legacy transformation has supported employment growth Here East, Stratford Cross, Westfield Stratford City, East Bank, the Hackney Wick and Fish Island Creative Enterprise Zone (CEZ). Without the vision and direction from the LLDC, it is unlikely that this area of east London would have experienced such significant growth and economic recovery during downturns.



Compared to all other London Boroughs, the Legacy Area has achieved a faster growth rate in GVA since 2012 and employment since 2015. Previously suffering from a lack of investment and limited employment opportunities, the legacy transformation at QEOP has refocussed London’s economic geography eastwards with a mix of public sector organisations, cultural institutions, innovative start-ups, universities, charities, creative enterprises and visitor destinations all choosing to locate at the Park. This has created a variety of employment opportunities that is driving increased economic output through supply-chains and increased consumer spending.

Plexal, a business incubator which that operates out of Here East, provides support and resources to nurture innovation and growth in start-ups, is now home to over **800 innovators**. Whilst the QEOP Innovation District, the agency that enables purposeful innovation projects and collaborations, now contains over **200 member organisations**. Such growth is underpinned by the research and development capacity provided by QEOP’s cluster of higher education institutions, including the UCL East campus.

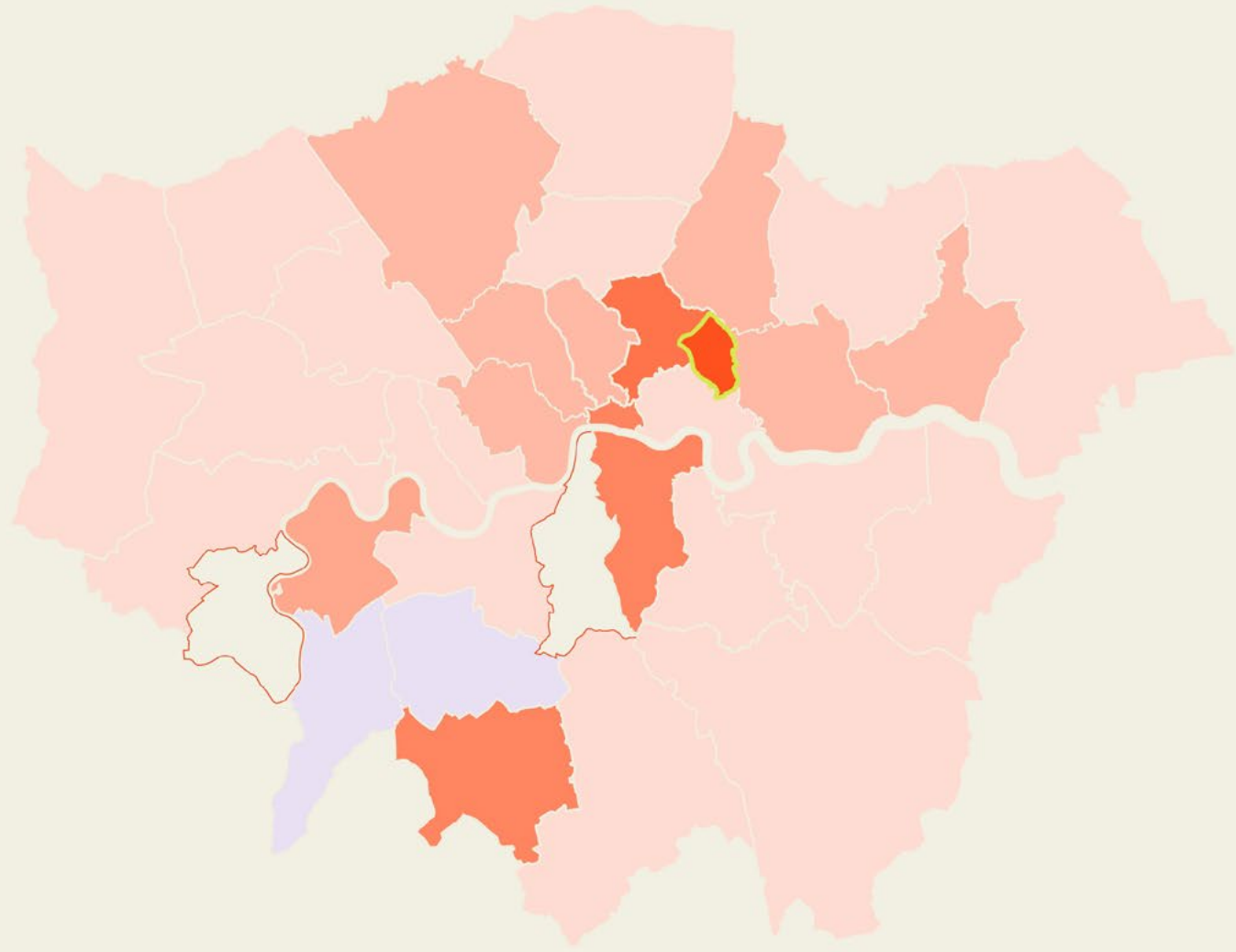
There is also growing agglomeration of large public sector and multi-national organisations located at Stratford Cross which is supporting higher value employment, including jobs at Transport for London, the Financial Conduct Authority, Cancer Research UK and UNICEF.



GVA in the Legacy Area has increased by 144% since 2012, 2.8x faster than the London average



Source: ONS, GVA by Small Area; Prior + Partners analysis



Employment in the Legacy Area has increased by 76% since 2015, 5.5x faster than the London average



Source: ONS, BRES; Prior + Partners analysis

[3]

Cultural assets, the Creative Enterprise Zone, and universities are supporting a growing cluster of creative industries.

Hackney Wick and Fish Island (HWFI) covers a significant part of QEOP. It is an internationally recognised creative and cultural area, where a dense community of artists creatives emerged in the 1990's, seeking low-cost workspaces in former industrial buildings. Recognising this rich ecosystem, the legacy transformation aimed to establish QEOP as a hub supporting creative industries and becoming a cultural destination. However, challenges have arisen. Increased investment has heightened HWFI popularity, putting pressure of land for housing. As such, the low-cost spaces that initially attracted creatives have faced rising rents and displacement

In response, several interventions have occurred, including the Creative Development Trust (CDT), a community-led organisation founded in 2017 to preserve HWFI's cultural life by securing buildings for long-term creative use. CDT led the successful designation of one of London's first CEZs, a Mayoral initiative ensuring artists and creative businesses find permanent affordable workspaces, supporting startups and workforce development. Since 2018, the CEZ has delivered **1,900 sqm of creative workspaces**, aiding industry recovery and **increasing employment by 64%**³.

The Legacy Area today supports a diverse range of creative businesses

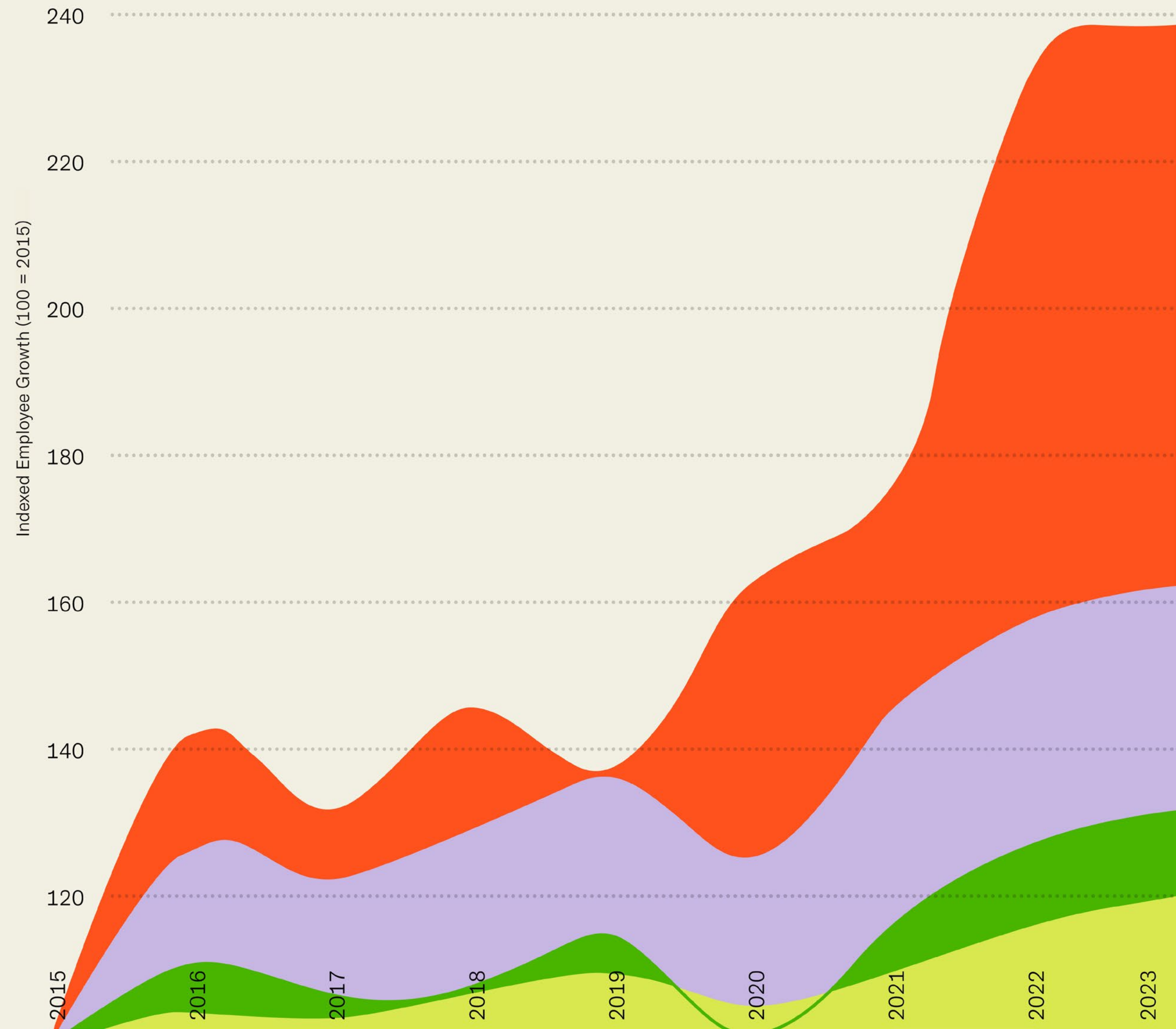
Today, the Legacy Area accommodates a variety of flexible spaces and studios to support creative businesses which employ over **1,950 people, growing by 140% since 2015**, outpacing growth across London. The creative workspace offering at QEOP includes the Tramperry on the Gantry which is a set of 21 freestanding studios within the repurposed steel structure at Here East². Other workspaces focussed on creative industries include The Lab E20—a flexible space to support positive fashion and sustainable living, Hackney Bridge—an events space and destination for local entrepreneurs, and The Tramperry at Fish Island—a campus for fashion, sustainability and innovation.

The arrival of major institutions at East Bank is expected to grow the creative and cultural sector at QEOP moving forward. This will be driven by the programming of cultural events, new facilities, collaboration between partners and the talent pool of graduates. This cultural and educational district is described as the largest single investment in culture and education since the creation of the South Kensington Estate in the 19th century.

Employment growth in creative industries across the Legacy Area is outpacing surrounding boroughs, London and England

Legacy Area Growth Boroughs London England

Source: ONS, BRES; Prior + Partners analysis





[4]

LLDC has successfully utilised its developments, assets and partnerships to support convergence, with an increased focus on sharing benefits more equitably.

In 2010, the Growth Boroughs (and a wider set of east London boroughs) adopted a vision for achieving ‘convergence’ which had the objective that “*within 20 years, the communities which host the 2012 Olympic and Paralympic Games will enjoy the same social and economic chances as their neighbours across London*”⁷. As evidenced in this

study, investment in the Legacy Area has generated significant economic impacts, which have benefitted Growth Borough residents, this includes the creation of **18,300 FTE direct jobs** filled by Growth Borough residents which generates annual gross earnings of **£886 million**. As such, QEOP has supported convergence through providing employment and training opportunities to local residents.

Evidence⁸ has shown that within the Growth Boroughs, across a large number of indicators; convergence has occurred. This includes through increased educational attainment, reduced unemployment and increased economic activity whereby performance of these metrics are in line with London averages. However, though it is accepted that convergence targets have been achieved, in part, due to a new resident population at QEOP of young professionals. As such, LLDC and the Growth Boroughs are now increasing their focus on reaching deeper into local communities so that the benefits of growth are shared more equitably.

← Local residents participating in activities at East Summer School

LLDC and the Growth Boroughs have laid the foundations for a more inclusive and fairer economy that benefits even more local residents.

Apprentices from the Shared Training and Employment Programme →

Despite the success of convergence in terms improved socio-economic data, findings from the *Citizen Prosperity Index for East London 2021-2031* has sought to provide more nuanced insights of prosperity; beyond these more traditional measures. The study is a longitudinal study that examines over 4,000 households across 15 established areas of east London, including neighbourhoods that border the Park. The findings of the work spur LLDC to ensure benefits are felt across its fringe neighbourhoods.

Whilst the data suggests otherwise this is likely to be driven by ‘importing prosperity’ and new population. A key finding within the report is that regeneration projects, like QEOP, cannot address structural effects of inequalities without targeted interventions and collaborative partners.

Partly in response to the *Citizen Prosperity Index for East London 2021-2031* study, but also in growing recognition that traditional measures of prosperity are often too blunt to reflect lived experience; LLDC has now made an active shift towards fostering a hyper-local inclusive economy, rather than just growth.

To achieve a more inclusive and fairer economy, several programmes and initiatives are being implemented at QEOP, many of which are unprecedented in mainstream regeneration.

These include but are not limited to the Good Growth Hub and Build East (explored further on the following pages) and significant investment in apprenticeships. QEOP has created 615 apprenticeships directly within the Park, and over 50% of which been filled by young people from the local area. These opportunities have included roles in construction, public administration, estate management, venues and cultural institutions.



70%

of Good Growth Hub Users
from underrepresented
backgrounds in creative
and cultural industries



[Case Study]

Good Growth Hub



Established in 2020, the Good Growth Hub is a creative careers support facility that seeks to improve accessibility to careers, employment and skills opportunities in creative, cultural and digital industries at QEOP by better connecting local talent with employers.

Working in partnership with the Growth Boroughs, UK Government, East Bank partners and other organisations, the Good Growth Hub provides a physical space at Hackney Bridge which facilitates the delivery of a high-quality careers programme, London Living Wage paid internships, 1-2-1 careers advice, pre-employment training courses, technical skills training and support for freelancers.

The Good Growth Hub has been co-designed and co-delivered in partnership with employers and local young people to ensure it delivers a demand-led service that responds to need. The innovative approach adopted by QEOP and LLDC through the Good Growth Hub provides young people with the soft skills and networks to improve access to well-paid and rewarding professions. The Good Growth Hub also works closely with employers to ensure they are fostering an inclusive culture that allows them to recruit and retain a diversity of talent.

The Good Growth Hub has delivered employer-led skills development training for over 2,000 people in the creative, cultural and digital industries⁴. This has been achieved through programmes such as Shared Training & Employment Programme (STEP), Flipside, Freelance Exchange, Creative Connect, the Creative and Cultural Opportunities Programme (CCOP). These programmes form part of the New Talent Future Leaders (NTFL) programme, an initiative by

LLDC, East Bank partners, Westfield, and Foundation for Future London.

LLDC is currently in the process of developing a business plan for the Good Growth Hub which safeguards its future up to 2028. Moving forward, the Good Growth Hub will move into a permanent new home within IQL North. Having recently received planning approval, IQL North is a mixed-use development in that it will also provide an expanded offer to social enterprises. At IQL North, the Good Growth Hub will continue to be the focal point for local people seeking careers in cultural, creative and digital sectors. The Good Growth Hub will continue to work in partnership with the East Bank partners through STEP and other initiatives.

↓
Current premises for the
Good Growth Hub at
Hackney Bridge



[5]

LLDC has used its powers to improve working practices, whilst creating construction employment and training opportunities for London's next generation of built environment professionals.



Since the 2012 Games, a major construction programme was undertaken at QEOP to transform and repurpose assets and venues to deliver a long-lasting legacy. Dedicated events venues such as the London Stadium, Copper Box Arena, the Lee Valley VeloPark, the Lee Valley Hockey and Tennis Centre and the London Aquatics Centre were transformed into multi-purpose venues for major sports teams and athletes as well as community assets local people. The Broadcast and Media Centres have been redeveloped into Here East, a globally significant

innovation centre. Whilst the Olympic Village was converted into East Village a new residential district for local people.

In addition to transforming legacy assets from the Games, the programme also included the construction of the legacy masterplan. This includes major developments at East Bank (Stratford Waterfront and UCL East), Chobham Manor, and East Wick + Sweetwater.

This post-games transformation of QEOP has created over **16,000 direct construction jobs**. Of these construction workers, approximately **4,000 jobs**⁵ are filled by local residents⁵. Cumulatively, the transformation of the Legacy Area has involved a workforce of over **55,300 construction workers**⁵.

QEOP has created an inclusive, diverse and skilled local construction workforce by tackling underrepresentation in the sector in partnership with leading contractors.

The large-scale regeneration of the Legacy Area presented opportunities to develop tailor made programmes and initiatives which have upskilled the local construction workforce, facilitating fairly paid careers within the built environment sector and supporting London's wider construction industry.

Since 2012, **417 apprenticeships** have been created in the construction sector through a shared apprenticeship programme⁵. This innovative programme allowed QEOP to overcome the challenges of the multiple tiers within the construction by allowing apprentices to move between employers as projects progressed.



A further **2,780 local people** have received industry-relevant construction training at QEOP⁴ through programmes and initiatives such as:

- **Design, Engineer, Construct (DEC):** a long-term programme delivered in schools and colleges in the Growth Boroughs which provides built environment education to students leading to qualifications at Levels 1, 2 and 3.
- **Serious About Youth:** a programme aiming to improve diversity and inclusion in construction.

LLDC has been successful in challenging the status quo in terms of gender equality and pay. Achieved through progressive training and procurement initiatives, **over 6% of on-site construction workers at QEOP have been female (compared to 1% nationally) whilst 3% have a declared disability**⁴. LLDC has also made a commitment that all construction contractors should pay workers a minimum of London Living Wage, which included making agencies commit to the programme. This initiative achieved a **London Living Wage** compliance rate of **99.3%**⁴.

[Case Study]
Build East

Build East, one of the Mayor's Construction Academy Hubs, is a sector-leading green construction skills centre of excellence, located in the heart of QEOP, which provides training and employment opportunities to benefit local communities and service the built environment sector in London and beyond. It is operated by The Skills Centre in partnership with LLDC and Places for London and was co-designed with Park Employers.

Supporting around **500 learners per year**, Build East is green construction skills centre that supports apprenticeships, NVQs, trade-specific tickets and industry training bootcamps. Built East services developments at QEOP, such as East Bank (Stratford Waterfront and UCL East), and is providing a skilled workforce to support London's wider construction sector.

With continued funding from the Mayor of London, Construction Industry Training Board (CITB) and the Department for Education, Build East is committed to supporting London's construction sector through delivering industry-specific training for **540 Growth Borough residents per annum over the next 3-years⁶**.

Construction training being →
delivered at Build East



“

I wanted to do this for a long time and change my career. This course is exactly what I needed, and I look forward to the next chapter in my career.

Successful and connected communities

[1]

Queen Elizabeth Olympic Park stands as a global exemplar of vision-led regeneration.

[2]

Over 13,000 homes have been built since 2012 through public and private sector collaborations.

[3]

A range of housing types and tenures have created mixed communities in distinctive neighbourhoods.

[4]

The Great Estate model has ensured a long-term commitment to regeneration and high-quality design outcomes.

[5]

Investment in connectivity infrastructure has created the conditions for growth.

[6]

Early social infrastructure has been essential for attracting investment and fostering a sense of community.

[1]

Queen Elizabeth Olympic Park stands as a global exemplar of vision-led regeneration.

QEOP is regarded as a global exemplar of vision-led regeneration. It serves as a case study, offering insights into how the public and private sectors can collaborate effectively to drive market change and transform a fragmented urban environment that faced significant physical and social challenges.

Whilst the 2012 Games may have been a once-in-a-lifetime opportunity for the UK, this research identifies several principles or ingredients for success, based on evidence and lived experience, that can be applied to other large-scale regeneration projects. The following summarises those learnings specifically to the context of development and delivery.

The importance of clear vision and purpose

Vision is consistently recognised as the driver of success at QEOP. It provides clarity and certainty to the market, but more importantly, it transcends all aspects of LLDC and its partners to provide a common and shared ambition. Part of the success has been that the vision has been underpinned by a clear economic rationale to underpin the regeneration opportunity.

However, it is the practical elements that flow from the vision—such as developer agreements, contracting conditions, and procurement practices—combined with the tenacity and boldness of those implementing it, that ensures the original vision remains uncompromised through political and macroeconomic cycles. Monitoring of the vision, and use of metrics to consider performance is also important.

Control of land powers are important for managing development outcomes

LLDC benefitted from the compulsory purchase of some 230 hectares of land in Stratford as preparation for and to enable the construction of the main venues and parklands for the Games. Since 2012, this meant that LLDC had significant control over land.

This control allowed LLDC (and its predecessor bodies) to carry out significant master planning and deliver with greater certainty from the outset. Combined with the broad range of devolved planning powers, LLDC has been able to manage development in a coordinated way with a consistency of design quality.

A robust but flexible framework that allows you to adapt

The original Legacy masterplan was based on the principle that the masterplan would be time-based; and to achieve the overarching vision would require the Park to adapt and evolve over time. In terms of built development this meant that parameters such as connections and heights remained fixed but land uses can change. Perhaps most notable to highlight on the need for flexibility on land uses, has been the pivot to deliver East Bank, a new cultural and education district on land previously allocated for housing.

Risks and benefits are shared across the private and public sectors

Sharing risk and benefits across the private and public sector public and private sector collaboration has been critical to deliver the scale and type of change that has occurred across the Legacy Area since 2012. Significant funding from the public sector has been vital in creating the conditions for growth through actions such as land assembly and infrastructure provision, which created more favourable market conditions and de-risked the private sector. Collaboration with the private sector has also allowed the MDC to take greater control of outcomes. The MDC's ability to accept lower land values to deliver public goods is recognised as an example of this.

The relationship between the public and private sector has also not remained static and has evolved based on experience—most notably the preference for LLDC to partner through joint ventures rather than developer agreements in 2020 has allowed LLDC to have greater influence on the development to deliver public goods.

↓ Community arts event at QEOP



“

Market making was the objective from Day 1. We needed to out compete the market in everything we did and shift investment to east London.

— Rosanna Lawes, Executive Director of Development, LLDC

[2]

Effective public and private sector collaboration has enabled over 13,000 homes to be built since 2012.

Across the four sub-areas of Hackney Wick and Fish Island; North Stratford and Eton Manor; Central Stratford and QEOP South; and Bromley-by-Bow, Pudding Mill Lane, Sugarhouse Lane, and Three Mills, **a total of 13,046 homes have been built since 2012 and are now occupied. An additional 12,935 homes are currently in the pipeline¹¹.**

Like other previous development corporations, LLDC was given the power to manage and control development, alongside owning, operating. Despite common misconceptions, development within the Legacy Area has overwhelmingly been driven by private developers on non-LLDC owned sites. This reflects that the private sector has generally been considered as the best placed to deliver quickly, but to the standards LLDC require through the clear planning process and Developer Agreements and Joint Ventures (JVs) being structured to maximise regeneration outcomes. However, it has been the collaboration between public and private; and the public sector creating the conditions for growth that have been so critical.

Endeavour Square at QEOP →



LLDC-led delivery of housing

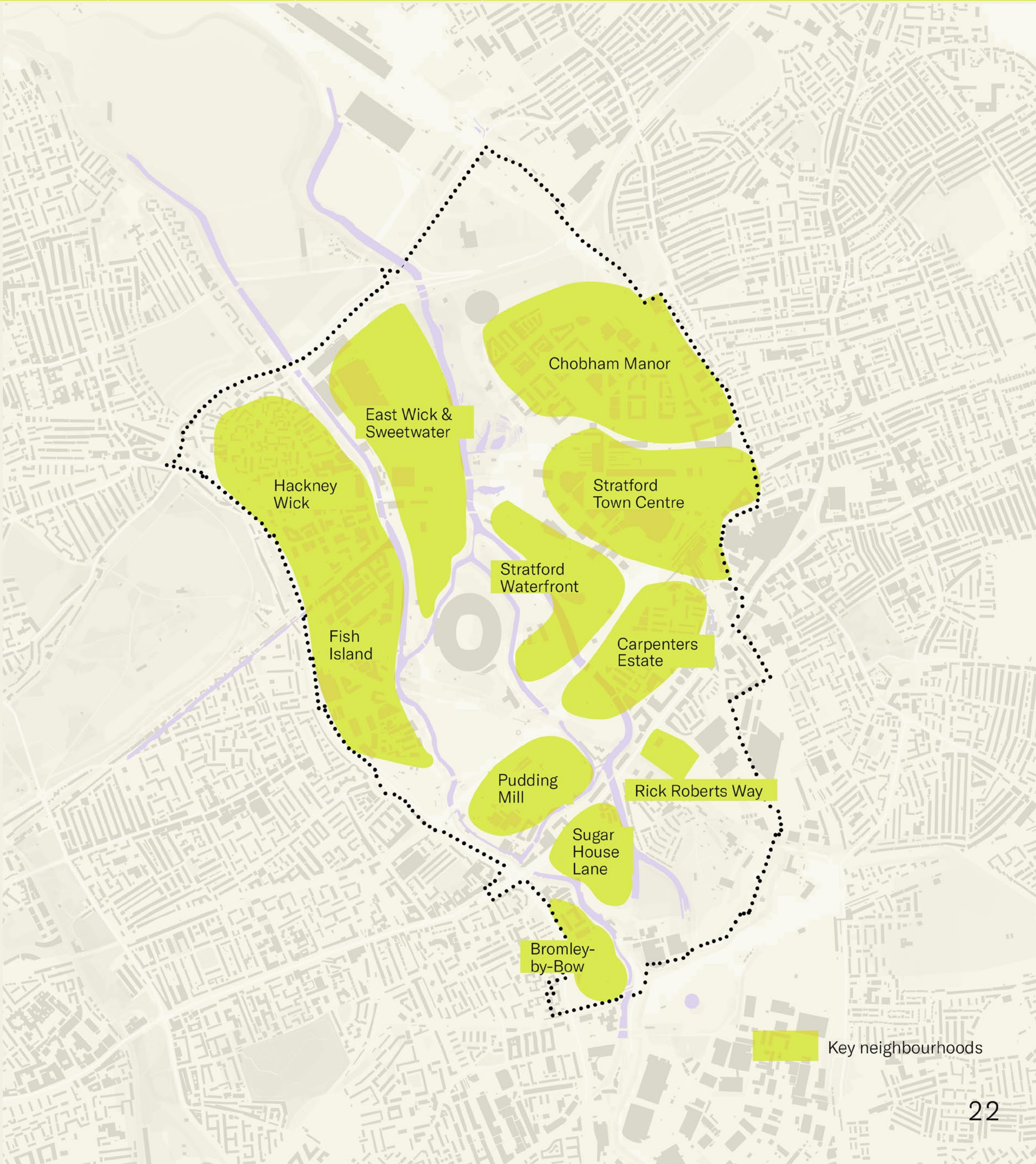
LLDC-led developments have delivered 1,182 homes across a new neighbourhoods, including:

- **Chobham Manor:** The 880 homes scheme was completed in 2022 by Chobham Manor LLP, a JV between Taylor Wimpey and London and Quadrant, through a development agreement model.
- **East Wick + Sweetwater:** Phase 1 of 302 homes is complete, with the second phase due to complete in summer 2025. The scheme is developed by East Wick and Sweetwater Projects, a JV between Places for People and Balfour Beatty Investments, on behalf of LLDC through a development agreement. Phase 3 will deliver an additional 411 homes, whilst consent has been obtained for Phases 4 and 5 which will deliver a further 772 homes.

A housing association has been established to own and manage the affordable housing in across both neighbourhoods. Development of the East Village (the former Olympic and Paralympic village) including housing, schools, medical facilities and infrastructure was delivered by the ODA, but moved to private sector ownership before the Games.

Future LLDC-led schemes will include:

- **Hackney Wick Central:** a 190-homes scheme developed by Notting Hill Genesis through a development agreement with LLDC. Construction began in 2023 and is expected to complete in 2026.
- **Bridgewater Triangle:** Development of a new community of 575 homes as a JV between LLDC and developer Ballymore construction, through a development agreement. Construction began in 2024 and is anticipated to complete in 2030.
- **Stratford Waterfront:** The JV between LLDC and developer Ballymore construction have been awarded planning consent for 700 new homes. Construction is set to begin in spring 2026 and complete by 2030.
- **Pudding Mill Lane:** Outline planning permission has been granted for 948 homes delivered in JV partnership with LLDC and Vistry. Construction is set to begin on the first phase in 2026.
- **Rick Roberts Way:** This scheme is expected to deliver 450 new homes and to be developed through a JV.



[3]

A range of housing types and tenures have created mixed communities in distinctive neighbourhoods.

From the outset, QEOP has been designed with the community in mind. One of LLDC's core objectives was for QEOP to be *“an attractive and inspiring place where people come together to achieve great things”*.

Today, the Legacy Area is home to 38,400 people, of which the majority of residents live on the edge of the Park¹. It has a young and large working age population, with over 45% of residents aged between 20-34, greater than averages for London and the Growth Boroughs². The area is ethnically diverse, more so than the London average (45.3% of residents in QEOP identified as white ethnicity, compared to 53.8% on average in London), and is reflective of the diversity of the Growth Boroughs³.

LLDC's housing policy focuses on addressing Londoners' needs by delivering a diverse range of housing types, sizes, and tenures. This includes accessible homes for people with disabilities, family and multi-generational homes, student accommodation comprising **over 3,500 bedrooms**, and affordable housing⁴.

Family homes make up 75% of consented homes in LLDC-led schemes

Whilst there was slow initial uptake, an increasing number of families are now occupying these homes. Although the proportion of family homes (defined as 2-bedroom+ homes) across the Legacy Area is below London and England averages, it surpasses expectations given the site's high density and land value constraints, which do not typically favour larger housing types.

The emphasis on family homes appears effective at achieving its goal of reducing transience, with 64% of Chobham Manor residents expressing a desire to stay for five years or longer, and 47% of households reporting children, exceeding the Newham average of 38.5%⁷.

Residential street at Chobham Manor →





Affordable housing delivery within the Legacy Area.

Between 2012 and 2024, consented developments in the Legacy Area have achieved an average of 33% affordable housing¹¹, surpassing both the London average (22%) and the Growth Borough average (25%). However, this provision of affordable housing falls short the 35% target set in the 2012 ‘Legacy Communities Scheme’, in line with the London Plan.

In recent years, the LLDC has faced criticism and challenge regarding whether its original commitments to delivering affordable housing have been met—particularly in providing ‘genuinely affordable housing’ at social rent levels, where rents are linked to local incomes. Since 2012, **3,587 affordable homes** have been delivered, of which **1,772 new social rent/London affordable rent-level homes** have been delivered in the Legacy Area¹¹.

This issue can partly be attributed to a significant proportion of housing delivery coming from older, large-scale, phased schemes that were approved under different political, policy, and economic contexts—including viability constraints following the 2008 financial crash. Notably, while political support for the project has remained broadly stable, the election of a Labour Mayor of London in 2016 introduced a new policy requiring 50% affordable housing provision on all public sector land. This policy shift affected development viability and approaches while balancing the LLDC’s role as a landowner in maximizing value to reinvest in wider infrastructure.

These challenges have also been compounded by a broader structural challenge that exists nationally. The social housing sector has shrunk dramatically, even as demand has surged, leading to a growing number of people on waiting lists. This issue is particularly acute in east London, exacerbating pressures within the Legacy Area.

Housing delivery, in particular, highlights the careful balancing act and sometimes trade-offs that exist within an MDC or large-scale regeneration project—particularly local vs regional and national needs. LLDC has been required to deliver and adapt across multiple economic, policy, and political contexts while balancing the priorities of the Mayor with the needs of local communities; alongside delivering a whole range of infrastructure. Large scale regeneration is more than the delivery of housing, and at affordable housing delivery as a metric for success for any large-scale regeneration should not be done in isolation, and must be considered

Looking forward, 50% affordable housing is being targeted across a portfolio of LLDC-owned sites comprising Stratford Waterfront, Pudding Mill and Rick Roberts Way. These will have a tenure split of 30% low-cost rent and 70% intermediate housing (a type of affordable housing priced between social and market rent and which includes shared ownership).

[Case Study]

Chobham Manor, Stratford (E20)

LLDC’s aspiration for Chobham Manor was to create a family friendly neighbourhood that reflects the scale and character of London neighbourhoods that make them so successful. It sought to achieve this through a mix of family homes, green spaces, and community facilities.

LLDC commissioned a post occupancy evaluation on Phase 1 of the development which was occupied in 2018. This approach has been notable in embedding reflective practices into future developments at QEOP, and beyond. It was carried out over a twelve-month period in 2021/2022 and included a combination of qualitative and quantitative studies.

The evaluation found that Chobham Manor is a young, family-friendly neighbourhood with a strong sense of community. The ethnic makeup of Chobham Manor is representative of the neighbouring boroughs of Hackney and Newham. There is greater ethnic diversity within affordable/ social rent homes and a higher proportion of white homeowners. Residents generally intend to stay for a long time and raise their children. This is due in part to the provision of a significant proportion of family homes (2+ bedrooms) and houses with gardens.

The scheme was designed to be socially resilient through the provision of community amenities, including the Central Green which runs through the neighbourhood and has become the ‘beating heart’ of the community, especially for families, with many happy to leave their children play there unsupervised. The neighbourhood also includes a community café, a nursery, and nearby schools including Chobham Academy, contributing to the strong sense of community in the neighbourhood.

While Chobham Manor residents generally share a strong sense of community, a clear divide exists between those in market housing and Nolan Mansions, comprising affordable and social rent housing. Nolan Mansions tenants often feel more connected to their block and the East Village neighbourhood, which their block entrance faces and with whom they share a road, than to Chobham Manor. They also have their own green and play space that is separated from the main one, and engage with the Residents’ Association less frequently.

Concerns were also raised about the Fixed Estate Charge, a charge contributing to the development and on-going maintenance costs of the Park, and the costs of the District Heating Network.

Part of the ambition for Chobham Manor was to create a neighbourhood that embeds sustainable transport. With both Leyton and Stratford tube stations within a 20-minute walk and good cycling and walking infrastructure provided, this aim for the neighbourhood has been reached. Of all residents at Chobham Manor, **59% commute to work by public transport** and **34% cycle or walk to work**.

Chobham Manor
neighbourhood →



Key facts:

Developer	LLDC and Chobham Manor LLP (Taylor Wimpey and LandQ)
Masterplan Architects	PRP (lead), Make, muf
Completion	Phase 1: 2018 Phase 2: 2020 Phase 3 and 4: 2022
New Homes	859 (35% affordable , 75% are family homes) 25 homes designated ‘exemplar’ demonstrating best practice in sustainable design
Density	100 – 205 dwellings/ha (medium density)
Other Uses	Retail, community centre / café, nursery
Typology	Perimeter blocks, mansion blocks and terraced housing
Post Occupancy Survey	87% Residents positive about neighbourhood, 75% feel there is a sense of community

[Case Study]

The Role of Planning

History and Context

From October 2012 to December 2024 the LLDC was the Local Planning Authority for QEOP and the Legacy Area, taking responsibility for a comprehensive range of statutory town planning responsibilities within the area. Like other MDCs that preceded such as the London Docklands, LLDC was given the power to manage and control development within its areas. This included the determination of planning applications, preparing a statutory Local Plan to set out the spatial growth strategy and other planning guidance. LLDC was also given the power to charge a Community Infrastructure Levy (CIL) which allowed it to raise funds from developers to contribute towards the cost of infrastructure. The planning powers were negotiated during the set up of the organisation, with management seeking to ensure that the organisation had the full wealth of powers available to them to deliver at pace. LLDC did not however secure powers to establish planning fees.

In 2024, with QEOP well developed and a significant proportion of the development now delivered, the LLDC planning powers returned to the four Growth Boroughs of Hackney, Newham, Tower Hamlets and Waltham Forest.

Decision Making and Governance

The LLDC had a governance structure comprising a Board and six committees, to which the Board has delegated specific areas of responsibility and decision making. Decisions on matters of planning policy such as the Local Plan, planning guidance and CIL were reserved to the Board, while decisions on applications for planning permission and other Development Management matters were delegated by the Board to the Planning Decisions Committee (PDC). A range of day-to-day development management decisions are also delegated to senior officers within then Planning Policy and Decisions Team.

Unlike local authorities, where elected members make planning decisions, the PDC included LLDC board members, independent expert members with regeneration and design experience and local councillors nominated from the four Growth Boroughs. The operation of the Committee was governed by a Code of Practice. The PDC and planning team has been noted for its reliability, **approving 97% of applications compared to the London average of 79%**, despite determining few applications overall⁶. This success has been attributed to the proactive approach to development management offers and the presence of independent committee.

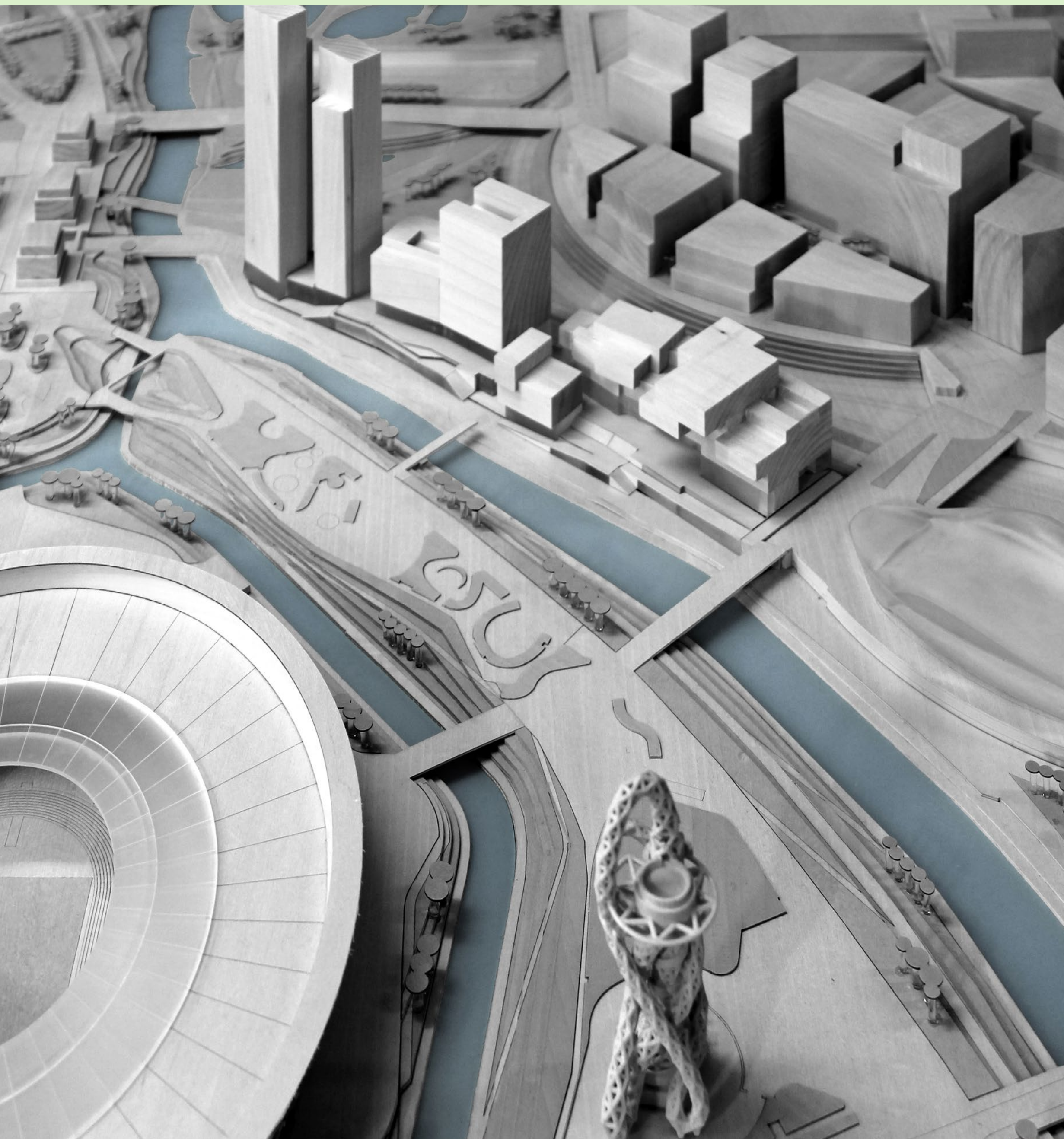


The LLDC established an innovative Quality Review Panel in 2012 to provide independent assessments of development proposals. With **633 reviews conducted**, the panel has been praised by the development community by offering constructive feedback, although occasionally it has faced criticism for delays caused by repeated reviews of major applications.

The Quality Review Panel was supported by the Community Review Panel (established 2023) and the Built Environment Access and Park Panels

(established 2012), which provided local and accessibility-focused perspectives. The Elevate Board, part of the youth empowerment programme, also feed into planning applications.

Further feedback on governance highlighted that LLDC’s dual role as both landowner/developer and local planning authority was sometimes seen as inherently conflicting, with responsibilities occasionally blurred. Nonetheless, this integration was vital to the area’s coordinated regeneration.



Resourcing and Capacity

The LLDC planning department was recognised as being better resourced in terms of staff compared to a typical local authority department. Salaries were also notably higher; for instance, the Planning Policy Team lead earned £71,342 per annum, compared to £58,197 offered for a similar role in a recent London borough posting. This disparity was partly due to the planning team's independent budget, but notably unlike boroughs, the LLDC planning department does not operate on a cost-recovery basis, where budgets are determined by revenue from planning fees.

Nonetheless, costs of LLDC's planning processes were offset by higher than average planning fees. In addition to standard fees for the planning application, the determination of the application, and legal costs associated with s106, developers were required to cover additional costs of pre-application planning advice, of the community and quality review panels, and of specialist independent review, where applicable.

Additional capacity was noted as contributing towards positive outcomes including:

- **Plan making capacity:** LLDC prepared, examined and adopted the Local Plan in 2.5 years. This significantly outperforms the average of seven years across England. Delivering the basic structures in policy environment ensured greater capacity for policy officers to trial new approaches and explore diverse range of research and supplementary guidance.
- **Design monitoring:** The planning team was able to effectively monitor design quality through the development planning process, which can often be value engineered. Time was invested by officers at planning stage to minimise value engineering at construction stage was key to maximising design outcomes.

- **Stronger relationships and convening power:** High quality and collaborative relationships with developers, contractors, architects and planning consultants helped to derisk approvals and maximise social and design value. LLDC was able to add value through convening powers, for example, despite not being a landowner, LLDC has been leading the Business Case for Stratford Station upgrades.
- **Staff retention:** It is recognised that LLDC planners offered better salaries than other local planning authorities, which helped to attract and retain talented staff. Consistency in staff has been praised in ensuring consistency in schemes from inception through to planning and delivery.

Perceptions from the development community

Feedback gathered through this research widely praised by developers and designers for its proactive approach, integrated planning functions, and supportive committee structures. Clear, design-focused policies guided quality development when aspirations were aligned.

However, some felt area-specific guidance was overly prescriptive, limiting creativity, and planning processes were occasionally seen as rigid and time-consuming. LLDC's long-term commitment to regeneration and infrastructure investment provided developers with confidence, while consistent and senior staffing ensured reliability. LLDC planning staff were noted for their motivation and accessibility. The transition of planning powers back to host boroughs is viewed as a potential risk to development.

[4]

The Great Estate model has ensured a long-term commitment to regeneration and high-quality design outcomes.

The management and development of the Park by LLDC has been modelled on Great Estate principles. Great Estates refer to large tracts of land under singular ownership, recognised for their long-term approach to investment and development, resulting in more resilient and high-quality places.

For LLDC, this involves retaining landholdings, including freehold ownership of sites, and taking full responsibility for site management to safeguard LLDC's vision. This approach ensures that regeneration prioritises long-term planning over short-term gains.

A defining feature of the Great Estates model is LLDC's commitment to managing QEOP for the long term, with a strong focus on achieving high-quality design outcomes. At QEOP, deliberate investment in design excellence has not only created high-quality spaces for communities but also established attractive, high-value locations for investment. QEOP's built environment is widely recognised for setting design benchmarks across London and the UK.

Reflecting this commitment, LLDC's developments and assets have received numerous awards for design and quality. Notable examples include multiple Design Awards for Chobham Manor and Neptune

Wharf, as well as accolades for Tumbling Bay Playground for its outstanding, inclusive design.

LLDC has implemented tools to ensure high design, including ambitious design standards, a team of internal and external design advisors, use of planning obligations and research initiatives focused on design and innovation.

Feedback from developers and architects has suggested that the design quality of LLDC-led developments have set a

high benchmark in terms what is expected across QEOP, encouraging excellence across other sites. By maintaining freeholder interest LLDC has been able to promote design quality across the Park to secure long-term value, beyond its own schemes.

As part of the Great Estate Model, LLDC implemented the Fixed Estate Charge to contribute to the development, management, and ongoing maintenance of the Park. However, it has faced criticism for the costs to commercial and residential occupiers associated with this charge, as well as the costs of the District Heating Network⁷.

Communities themselves have played an active role in shaping the ongoing development of the Park. The LLDC's Code of Consultation has ensured transparent and meaningful engagement with local residents, businesses, and stakeholders. Local residents have been involved across planning and decision making process as part of the Park Panel and the Elevate Board, consisting of local young people. LLDC established a number of initiatives for local residents to become active participants in their communities, notably, the 'Neighbourhood Talks'. This six-monthly resident forum is a platform for residents to meet with LLDC representative and other organisations based around the Park and identify opportunities for their involvement.

“

We aim to be the next Great Estate of London—a model for the 21st Century. Our ambition is to deliver neighbourhoods of the highest quality and distinction. We believe this is achieved through a deep understanding the context in which we work, by promoting different ways to deliver and ensuring we connect to the existing neighbourhoods surrounding Queen Elizabeth Olympic Park.

— LLDC Design Quality Policy

Inclusive design has been embedded in the Park to meet the needs of diverse communities

As QEOP lies in one of the most diverse areas of the UK, the development of the Park was guided by a commitment to inclusion and diversity. The design of QEOP was intended to meet the needs and requirements of a wide range of age groups, ethnicities, backgrounds, genders, religion, and abilities. A stand-out example is LLDC's success in promoting gender inclusivity in public spaces.

The commitment to designing inclusive places was embedded in planning policy and in LLDC's core ethos, underpinning all decision-making. LLDC has developed innovative policies based on QEOP as an exemplar for inclusive design, notably the *"Inclusive Design Standards"* and *"Creating places that work for Women and Girls Handbook"*.



↑ Wheelchair basketball event at QEOP

“

It has been easy to work with LLDC's design policies as we are driven by inclusive high-quality development. The guidance and Local Plan are well considered.

— Mark Lebihan,
Hadley Group



[Case Study] Inclusive by Design

LLDC's *Inclusive Design Standards* set out LLDC's vision for delivering inclusive places and neighbourhoods. It sets out the standards that are expected across all development in the area. These standards are enshrined in LLDC's planning policy. Developers had positive perceptions of LLDC's design guidance.

Further to setting up the Inclusive Design Standards, LLDC's process to ensuring inclusive design across all its developments included creating a 'Inclusive Design Principal' officer role and establishing the Independent Built Environment Access Panel.

LLDC also consolidated knowledge and best practice of implementing gender-informed principles in design and planning into a *Creating Places that Work for Women and Girls Handbook*.

The award-winning handbook provides practical and informed guidance based on QEOP and international research on lived experience of women & girls and gender diverse people in cities. It seeks to ensure that: *"all relevant development projects and decisions made within the LLDC area take into consideration the voices of women and girls"*.

Investment in connectivity infrastructure has been fundamental in creating the conditions for growth.

Plans for regeneration in east London in parallel with the 2012 Games resulted in significant infrastructure delivery at the strategic scale, including new road and rail links and the development of Stratford International Station. LLDC leveraged the 2012 Games for funding to continue preparing the site such as burying power lines, the remediation contaminated land and restoring waterways, and delivering infrastructure.

Delivery of infrastructure and transport connections to the Park has catalysed its transformation and enabled large scale growth. Investing in infrastructure is well recognised as creating the conditions to attract investment from the private sector. The role of the LLDC as a MDC—with land assembly powers, a clear focus on delivering legacy and social value, together with its well-resourced design team and a connectivity team embedded within it—has played a major hand in achieving this.

The Legacy Area is a strategic transport node within London and the wider sub-region

Stratford Station and the access it provides across multiple modes of transport has been central to the area's regeneration, as well as the wider regeneration of east London. The station acts as a major transport interchange, linking the UK's most productive employment centres with its busiest ports, airports and largest growth areas, including both the Thames Estuary and UK Innovation Corridor. Stratford has become one of the busiest stations in the UK as the number of annual passenger has increased by 90 million over 13-years to reach **128 million passengers** in 2019⁴. LLDC is also leading work to develop the case for long term redevelopment of Stratford Station, as the station is expected to see continued increasing demand in line with planned growth across east London.

One key measure to drive change was the rezoning of Stratford Station following successful lobbying by LLDC. In 2016, eight east London stations, including Stratford, were moved from London Travel Fare Zone 3 to Zone 2/3. This change aimed to secure the Olympic legacy and reduce barriers to movement to and from the Park, alongside boosting land values and altering investor perceptions. The Zone 2/3 boundary change also made travel more affordable and supported a widened labour market.

Connectivity improvements have stitched together previously disconnected places

LLDC had to address major challenges of severance across the Legacy Area caused by the railway lines through Stratford, major roads, and waterways to create accessible and connected new communities. LLDC heavily invested in creating a network of streets and pedestrian and cycle network routes and in numerous improvement to rail stations. **Since 2015, £66.4 million of the CIL monies has been spent on connectivity projects.** This has been used to leverage further significant infrastructure funding and investment from developers, boroughs, Transport for London and the GLA towards the delivery of connectivity projects⁴.

Embedding dedicated resource focused on the delivery of connectivity projects within the design team helped create communities where active travel and public transport are fully integrated. Public transport is the main mode of transport for around 60% residents at Chobham Manor⁷ and employees at Here East⁸, and for 47% of visitors to the Park and venues⁹. Active travel is used by 34% of residents at Chobham Manor, by over 25% of employees at Here East, and by 45% of visitors to the Park and venues.

However, feedback from Park stakeholders highlighted the significant challenges to wayfinding across the Park that remain and the disconnect to existing communities.

In recent years, LLDC has focussed investment to connecting QEOP into surrounding neighbourhoods. For instance, LLDC's investments into Hackney Wick station and new bridges over the River Lee have connected Hackney Wick to QEOP and been integral in supporting the development in this neighbourhood. A new entrance to Stratford station has recently been delivered in partnership with the London Borough of Newham to provide more direct access to residents of the Greater Carpenters Estate and support major regeneration plans for the estate. LLDC's shifting focus on stitching surrounding communities into the heart of the Park has enabled neighbouring communities to benefit from investments in QEOP.

Looking forward, connectivity projects will continue to be delivered to address ongoing challenges, notably those of wayfinding and connectivity to existing communities. A further **9 projects are planned to be built in coming years**. Whilst there is also the potential for a new station at Temple Mills, unlocking new developments at New Spitalfields Market and Leyton Mills and transforming connectivity for the north of the Park.

↓
Bridge being installed at QEOP in the lead up to the 2012 Games



[6]

Early social infrastructure has been essential for attracting investment and fostering a sense of community.

The 2012 Games presented the opportunity to plan for and integrate new social and community facilities and green infrastructure from the outset, often in advance of the new residential population.

A wide range of social infrastructure has been delivered across the Legacy Area including five primary schools, three secondary schools, a health centre, the Chobham Manor community centre, and nearly 6 hectares of local open space (in addition to the parkland)⁴. The landscape-led development with parkland at the heart of the community sought to make an attractive, better-connected and healthy place to live.

Social infrastructure has been designed for access by both new and existing communities

LLDC has been commended by the development community for prioritising the early delivery of infrastructure as part of the wider delivery

programme and for ensuring access to existing communities who surround the Park. Social infrastructure was positioned around the edges of the Park to become ‘places of exchange’ between new and existing communities.

The Bobby Moore Academy and Mossbourne Riverside Academy, which the LLDC was integral in delivering, are notable examples of this. The catchment for the

Mossbourne Riverside Academy’s, located on the western edge of the Park, intentionally draws equally from existing communities in Hackney Wick and new communities on the Park. The school was delivered in partnership with London Borough of Hackney, providing access to the Department of Education’s Targeted Basic Need funding for delivery, and has been integrated into the borough’s network of schools. The Bobby Moore Academy was designed with spaces that serve as community infrastructure. Several schools have achieved awards for their design and academic standards, with two schools receiving an ‘Outstanding’ judgement and two receiving a ‘Good’ judgement from Ofsted.

By prioritising the early delivery of community facilities upfront, LLDC has successfully fostered a sense of community, with 73% of Chobham Manor residents agree there is a real sense of community in the neighbourhood⁷. This strategy has also helped to challenge the negative perceptions of new projects among existing communities and increased the appeal of both public and private sector-led housing developments.

LLDC has maximised development funding to invest in social infrastructure and local communities

LLDC have been highly effective at maximising developer contributions which are subsequently spent on delivering meaningful impacts for local communities. Contributions gathered through Section 106 and Community CIL have been invested in projects that enhance social infrastructure and fund community projects. To date, LLDC has allocated **£129.4 million of S106 and CIL monies**⁴ (72% of which has been secured¹⁰) to strategic infrastructure, carbon offset, and local community projects.

Effective matrix working and the governance structure with the planning team (notably the Project Proposals Group (PPG) has expedited decision making on spend and ensured that there are clear priorities linked to LLDC’s overarching vision.

↓ Performers at the Greenwich and Docklands International Festival



[Case Study]

Neighbourhood Priorities Fund

The Neighbourhood Priorities Fund (NPF) is an innovative tool to fund local community projects. LLDC is required to spend 15% of community infrastructure level charges (a charge levied on new development) in consultation with the local community and LLDC established the NPF as a mechanism to do this. The NPF enables the local community to bid for funding for projects that either contribute to the provision, improvement, or operation of infrastructure, or address the demands that development places on the LLDC area.

A total of almost **£4 million was allocated to 78 projects across 4 bidding rounds**, which were run 2018, 2019, 2020, and 2022⁴. Projects varied from creating new spaces (e.g. the Glyn Hopkin Abbey Hub's outdoor space for children and Badu Cafe, a new café connecting existing communities to the Park), supporting artistic, health, and sports programmes (e.g. Bikeworks, an inclusive cycling initiatives which has since established an inclusive Cycling Centre of Excellence on the Park,) and funding social enterprises (e.g. Social Arc, which supports young people to become social entrepreneurs).

Legacy Football League is a project funded by the Neighbourhood Priorities Fund. Legacy Football League provides grassroots youth football league, providing football skills, media and mindset development for young players and clubs in east London. The project builds on extensive consultation with the local community. The inaugural 2022/2023 season was hosted at the London Marathon Community Track next to the London Stadium.



An asset for the community

[1]

The Park's legacy has enabled widespread grassroots participation in sport.

[2]

Day-to-day, the Park and its venues are predominantly used by local communities.

[3]

The Park is a valued public space and piece of social infrastructure, with commitments to inclusion reflecting the diverse local communities.

[1]

The Park’s legacy has enabled widespread grassroots participation in sport.

One of the most powerful contributions of the Park’s legacy is that its venues have enabled sporting participation at the grassroots and ‘everyday’ level, not just for elite and professional athletes. Core facilities for cycling, swimming, hockey and tennis across the venues are open to the public, with prices for community use aligned with local authority pricing. The venues also provide a combination of gyms, fitness classes, as well as publicly accessible cafés and bookable meeting rooms. Venues including the London Aquatics Centre and ArcelorMittal Orbit are in part funded by public subsidy, therefore it is vital they deliver maximum value for the public good.

As of 2023, the Copper Box Arena and London Aquatics Centre had over 9,300 paid members, with

a combined annual throughput of 1.1 million¹. This includes accommodating sessions for 69 schools, 73 sports clubs and in excess of 180 events across sport, culture and community^{1,2}.

Furthermore, 1.2 million people have taken part in sports activities across Lee Valley Regional Park Authority venues at QEOP. Excluding COVID years, this equates to an average of over 130,000 people per year³. Whilst the London Stadium itself is not regularly accessible to the public, operators LS185 provide year-round subsidy for the London Marathon Community Track. Since 2018, the venue has been used by over 250,000 people across community sports groups, charities and schools⁴.

In combination, this has created a unique network of assets supporting physical activity and participation in sport and beyond.

4.7 Million

Local residents using Park venues per year.

Aqua Splash at London Aquatics Centre →



The adaptability of sporting venues at QEOP, supporting activity across sport, culture and community, has been a key ingredient to their success.

The Park was ahead of its time in that sense, delivering a range of facilities accommodating not only sporting events but concerts, event and conferences, keeping the spaces active and accessible 7-days-a-week.

The **Copper Box Arena** is one of London’s most flexible indoor venues. The third largest arena in the capital, it has hosted over 17 different sports, and is home to various national governing bodies including taekwondo, indoor rowing and skateboarding. It has become a leading destination for Esports hosting tournaments such as Apex Legends. It has also hosted in excess of **500 non-sporting activities** for daily community competitions, conferences and events across fashion, the arts and education⁵.

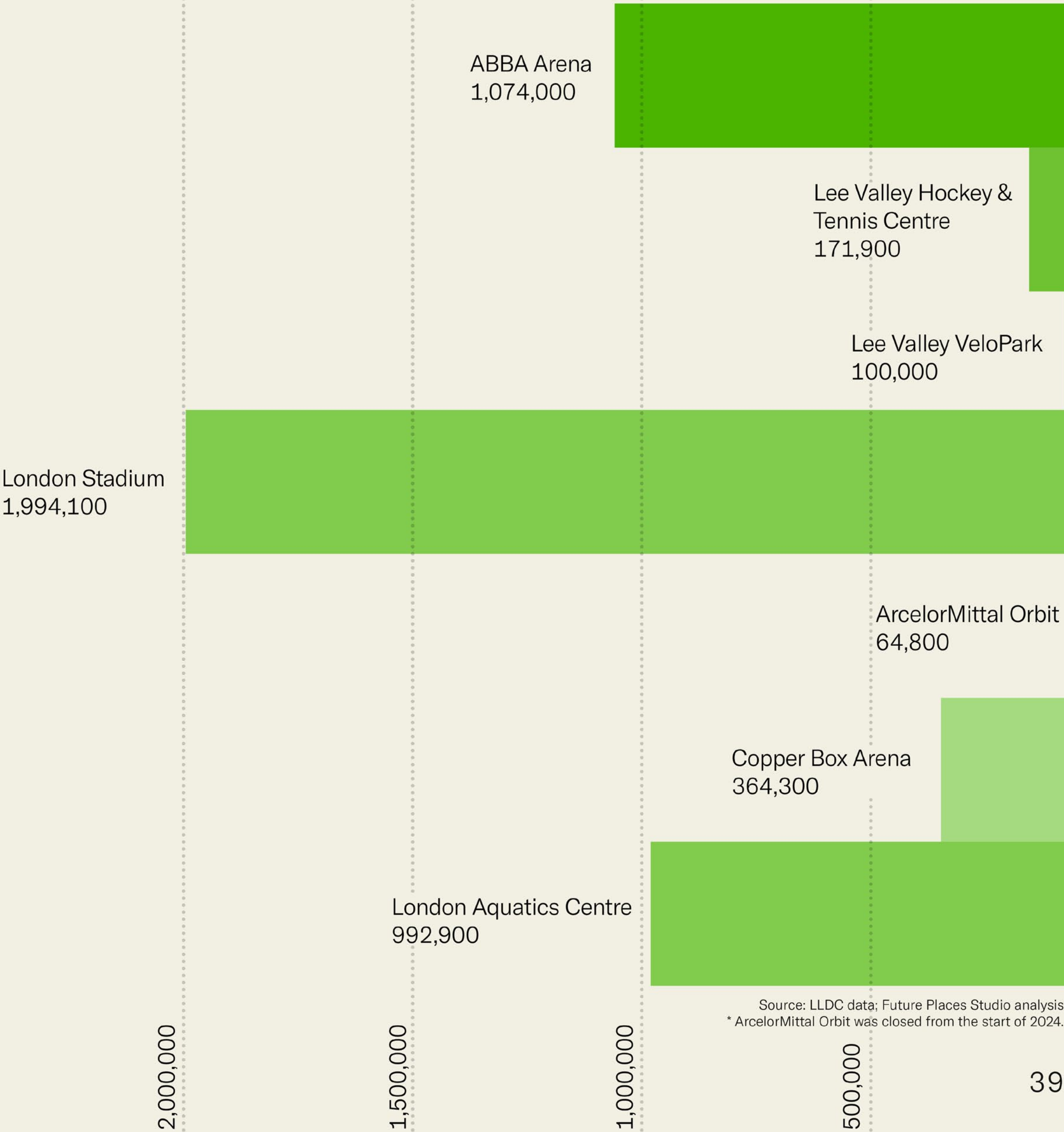
The **London Aquatics Centre** was also originally designed with temporary stands, creating capacity for up to 17,000 spectators. This has now been significantly reduced to enable day-to-day use by the community. As well as accommodating elite and Olympic level athletes, the space is regularly in use by all the general public across swimming, diving and aquatics.

The **Lee Valley VeloPark** provides café, conferencing and meeting facilities, as well as a 3,500m Track Centre which has hosted speeches by Prime Ministers, award ceremonies, and exhibitions. The Lee Valley VeloPark now hosts the College of E-Sports, delivering Foundation and Bachelor Degrees, creating a long-term learning hub for people from the local community and beyond, adding to the Park’s rich educational offer.

The **London Marathon Community Track** is a multi-use sport, education and event space. It is home to an athletics club, an LGBT+ football club, and the Bobby Moore Academy, giving students access to the running track, 11-a-side grass pitch, and field events area.

Similarly, in addition to hosting a range of international wheelchair tennis and hockey events including the Women’s Hockey World Cup and the Hockey Champions Trophy, the **Lee Valley Hockey and Tennis Centre** is home to six local teams and nine university clubs. The venue provides extensive tennis opportunities across four indoor US Open Standard courts and six outdoor courts. This includes Wheelchair Tennis sessions, festivals and coaching clinics at this regional hub for disability tennis. Meanwhile, commercial activity provides funding for invaluable community initiatives such as tennis for mental health programmes.

Venues at QEOP are visited 4.7 million times per year by daily users from the local area.



Source: LLDC data; Future Places Studio analysis
* ArcelorMittal Orbit was closed from the start of 2024.



[2]

Day-to-day, the Park and its venues are predominantly used by local communities.

Following the 2012 Games, the rapid reopening of the North Park attracted over 1 million visitors in the first year. In the early years of cultural, commercial and community programming following the 2012 Games, events including Active People Active Park, Paralympic legacy initiatives such as Motivate East and National Paralympic Day, the Mayor of London's Liberty Festival and the formation of the Global Disability Innovation Hub with UCL East attracted an audience of over 500,000 people to the Park.

The Park continues to draw in visitors from all parts of the UK and beyond. Findings from the last 6 years illustrate that day-to-day, it is used as an asset for local people. Local communities are the primary users of the Park, making up **71%** of all users⁸.

Recognising the commitments surrounding 'community' as a key objective for LLDC, it has certainly been a success in bringing local people together. This is illustrated in many ways, but was also shown to be a critical public health asset during the COVID pandemic¹¹. Since 2021, the percentage of east London Park users has risen to 80%⁸.

Furthermore, local residents account for a significant majority of venues usage. Data provided by operators of the **Copper Box Arena** and **London Aquatics Centre** reports that 83% of members are Growth Borough residents². At **Lee Valley** venues, this

88.6%

is further supported through a range of community programmes which have seen¹²:

QEOP residents report being in good or very good health, higher than London and Growth Borough averages⁶.

In creating this accessibility, venues can be said to have played a significant part in enabling physical activity for local people, making a tangible contribution to health and wellbeing. This is reflected in census data, highlighting QEOP residents are healthier than the rest of London⁶. However, QEOP does have a role to play in supporting continued improvement of health indicators across the Growth Boroughs, with certain areas outside the Park still suffering from acute health inequalities and deprivation.

← Performing arts activity at The Great Get Together

[3]

The Park is a valued public space and piece of social infrastructure, with commitments to inclusion reflecting the diverse local communities.

In relation to venues, 41% and 35% of **Copper Box Arena** and **London Aquatics Centre** users are from ethnic minority backgrounds respectively⁷, which rises to around 43% when considering overall users of the Park⁸. This is supported by clubs and community initiatives on the Park, with organisations such as E20 Football Foundation and Badu CIC creating opportunities for participation and education for all the local community, whilst Tower Hamlets Hockey Club (based at the **Lee Valley Hockey and Tennis Centre**) specifically targets participation from ethnic minority communities. Employment within the venues is also diverse, as venues have contractual obligations to employ individuals from under-represented groups.

Despite significant improvement in recent years, there remain areas which do not always deliver for the whole community. Academic research from 2014 identified that whilst Park was well used by ethnic minority residents, this is mostly concentrated in the south where there are more play areas, seating and hard landscaping, whilst the north of the Park, with a

more ecological and 'wild' focus, are less used by these groups⁹. A repeat of the study 10-years on showed an increasingly diverse audience to this Park brought about by a recognition of differences, ongoing dialogue with the surrounding communities, co-design and participative practice, inclusive Park programming, and improved connections to surrounding neighbourhoods¹⁰. Research was also conducted on the safety perceptions of the Park by women and girls. Through consultation, the research identified specific interventions addressing the safety concerns of women and girls, seeking to generating a more inclusive and welcoming environment for all.

Facilities across the Park also accommodate a range of initiatives to support disability activity, women and girls, young people, addressing social and economic exclusion. For example, the **Copper Box Arena** hosts wheelchair basketball sessions throughout the year, have partnered with Metro Blind Sport and offer discounted access for people with disabilities. In tandem with the **London Aquatics Centre**, the sites also offer lower rates for young people and have partnered with Better Health UK to increase accessibility for those on lower incomes. They have established partnerships with London Pulse and Leyton Netball Club to deliver training camps, development pathways into netball and junior coaching for women and girls.

The Great Get Together →



[Case Study]

LVRPA – Balancing Community and Commercial

Responsible for approximately one-third of QEOP and two major sporting venues, LVRPA has played a significant role in the development of the Park to date with a specific focus on promoting the sporting offer for both the community and elite athletes.

QEOP is a core part of the much larger Lee Valley Regional Park which is a 26-mile long, 10,000-acre expanse stretching through parts of London, Essex and Hertfordshire. It was established in the 1960s by a unique Act of Parliament as a “green lung” for the region.

LVRPA have established an approach which is both commercially driven and community focused, delivering activities, sights and experiences for both visitors and local communities.

LVRPA are at the heart of the long-term sporting legacy of the 2012 Games. Within QEOP, they own and operate the Lee Valley VeloPark and Lee Valley Hockey and Tennis Centre. Also part of the 2012 Games, LVRPA also operate the Lee Valley White Water Centre, 10-miles north of QEOP.

LVRPA has always been viewed as the “legacy client” for these venues, making sure they were created for long-term and sustainable post 2012 Games uses. The LVRPA venues are open and accessible to all communities, forming a major part of the region’s core social infrastructure, as well as offering offer professional standard facilities for international events. Community has always been a major priority with close partnerships with LLDC, national governing bodies, community grouping and funding programmes available to broaden participation.

Since opening, Lee Valley venues at QEOP have delivered community programmes which have seen:

- Over **30,000** people enjoying free cycling, hockey or tennis through LVRPA-funded initiatives
- **7,700** people receiving free tickets to watch major international events
- Over **2,500** pupils participating in learning and engagement programmes

Lee Valley VeloPark is now also home to the College of Esports, which is delivering Foundation and bachelor’s degrees in international Esports business areas and adding another major establishment to QEOP’s education offer.

Going forward, LVRPA have reaffirmed their commitment to ensuring these venues continue to serve the needs of communities regionally and locally. Their statutory focus on sport, leisure, health and wellbeing shapes their commitment to investing further into their two world class QEOP sites to both keep them relevant and viable in the long-term. Plans are also to be developed with partners for major investment in the wider Eton Manor site.

“

As a mother of four young children these sessions are a respite for me, a brilliant form of self-care and an opportunity to be with my community.

— Mona, a regular at the Come Ride with Us events hosted by Black Unity Bike Ride at Lee Valley VeloPark



[Case Study]

The London Aquatics Centre

Developed as one of the key venues for the Games, and opened to the public in 2014, the **London Aquatics Centre** (LAC) houses two 50-metre pools and diving pool, and during the Games included temporary stands giving a **spectator capacity of 17,000**. After the Games, the stands were removed, with the centre converted for community use.

It is one of the most technologically advanced swimming facilities in the world, as well as a gym and café all open to the public 7-days-a-week. It continues to host swimming and diving activity all the way from grassroots to elite Olympic athletes. Drawing in over **1 million** visits per year, it is used by **62 clubs** and **57 schools**, as well as the Tom Daley Diving Academy.

Since re-opening, it has established a significant number of community initiatives delivering social value for local people. The centre has partnered with organisations to increase accessibility for the disabled, elderly and those on low incomes, as well as providing a platform for young people to get into swimming and diving. These partnerships include a local organisations such as Badu Sports and CoreSport, charities like Level Water, and governing bodies such as Paralympics GB.

In addition it has hosted school holiday programmes, provided disability swimming lessons, and offers £1 entry fees at off-peak times to increase overall accessibility.

As of Q2 2024, the LAC had generated in excess of **£846,000 in social value for its users**, improving social and physical health, boosting wellbeing and making provisions for social and community development¹³.

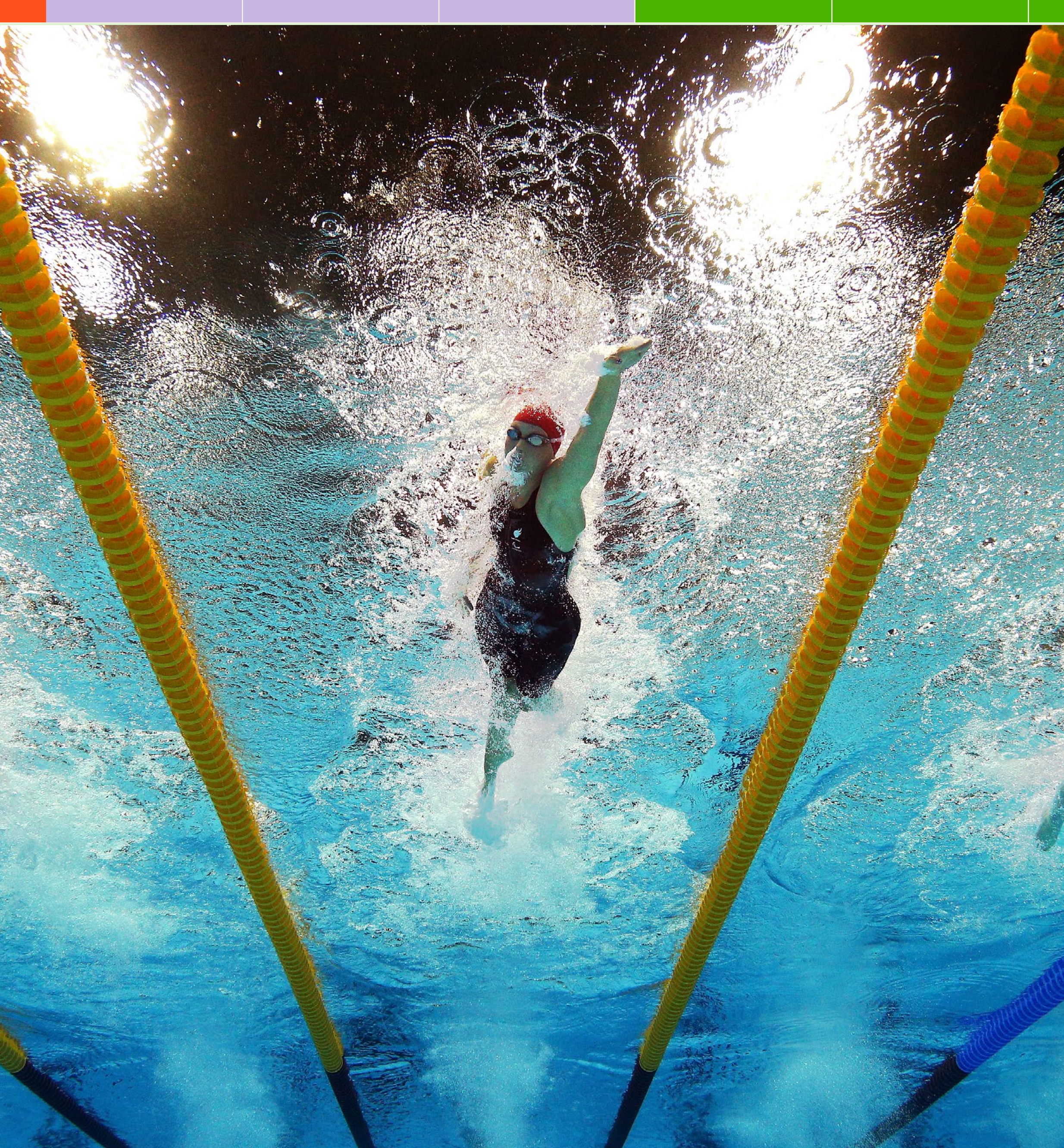
From March 2024, Everyone Active took over as the main operator for the London Aquatics Centre for at least the next 8-years. Ambitions remain consistent for the future, aiming to sustain and expand upon the aquatics legacy for local communities.

“

We remain unwavering in our commitment to providing leisure services and facilities tailored to the unique needs of local communities. We take huge pride in offering opportunities for people of all ages, abilities and interests to engage in physical activity.

— Everyone Active Regional Director, Duncan Jefford





← Elite swimmers at the
London Aquatics Centre

[Case Study]

Speedo Aquatics GB Swimming Championships 2024

In 2024, the London Aquatics Centre hosted the Speedo Aquatics GB Swimming Championships. As well as delivering an elite level swimming competition, this event was used as an opportunity to maximise social impact.

Collaborating with local and national partners, the event facilitated programmes connecting with local communities around skills and inclusion. Organisations involved included national disability charity Level Water, and Badu Sports, whilst Olympic athletes also hosted a clubs masterclass. The event also saw the launch of Pride Swim 2024, with 63 swimmers of all ages participating in a 90-minute swim session. Overall, the event saw 700 children and 100 adults (predominantly from Growth Boroughs) engaging with the social impact programme.

“

Amplifying projects that help to increase diversity and representation across our sport; breaking down barriers and increasing opportunities for underrepresented and disadvantaged groups to experience aquatics.

— Speedo Aquatics GB
Swimming Championships
2024 Social Impact Report

Innovation and the business environment

[1]

LLDC has created an ecosystem of assets, infrastructure and partnerships which support a 7-day-a-week economy.

[2]

QEOP has created the conditions to support a number of growing specialisms in future-facing sectors.

[3]

The Park has cemented its status as one of London's premier innovation districts, serving as a testbed where solutions are trialled, developed, tested, and scaled to address key global challenges.

[4]

QEOP's cluster of universities is working together to meet the skill needs of future growth industries.

[1]

LLDC has created an ecosystem of assets, infrastructure and partnerships which support a 7-day-a-week economy.

The Legacy Area is home to 1,900 businesses across a diverse range of industries. The number of businesses located across the Legacy Area has increased by **45.2%** since 2016, which is significantly faster than the growth for London over the same period¹. These businesses are accommodated in approximately **420,000 sqm of new employment**

£24.0 Million

Additional business rates generated per year from employment floorspace delivered in the Legacy Area.

floorpace, which has been delivered in the Legacy Area. This additional employment floorspace generates an additional **£24.0 million**

in business rates annually, the majority of which goes to the London Borough of Newham. A further **150,000 sqm of employment floorspace is consented³.**

The availability and flexibility of employment floorspace across the Legacy Area, alongside access to a highly-skilled workforce, presence of major cultural and educational institutions, and strong public transport connectivity at Stratford has attracted investment from businesses a range of future-facing economic sectors.

Alongside major players such as Westfield Stratford City, the Europe's largest shopping and leisure destination, headquarters for public sector institutions such as Transport for London and The Financial Conduct Authority,

major charities including UNICEF and Cancer Research UK, and world-leading universities, the Legacy Area is also home to a rich diverse of independent SMEs and micro-businesses.

The facilities and mechanisms available at QEOP, including business incubators at Here East and Plexal, as well programmes and funding from The Good Growth Hub and Elevate, is creating the conditions to grow the number of small- and micro-businesses at the Park, which has increased **4x** faster than the rate for London¹.

The Legacy Area has an ecosystem of distinct districts that supports a resilient and diverse economy

QEOP's vibrancy and economic resilience are driven by a mix of distinct character areas, each with its own role and function. While specific areas of the Legacy Area have their own economic and social functions—for example, the innovation cluster at Here East and Creative Enterprise Zone at Hackney— every part of the Park is a component of the broader economic ecosystem, collectively delivering an asset that is greater than the sum of its parts.

Ranging from the CEZ at Hackney Wick and Fish Island to the innovation cluster at Here East, the Legacy Area accommodates an ecosystem of businesses in high-value, creative and future-facing industries. Midweek activities are driven by knowledge-intensive and professional services business activities at Here East and Stratford Cross, coupled with the day-time student population

attending one of the Park's seven universities.

10,000

Retail jobs in the Legacy Area, including Westfield Stratford City.

The weekend economy is centred around a growing offering of leisure and recreation activities across the

Park's venues and visitor destinations, the bar and restaurant offering in Hackney Wick, as well as the retail and leisure facilities at Westfield Stratford City, which makes up the majority of the **10,000 retail jobs in the Legacy Area²**. Westfield Stratford City, catalysed by 2012 Games and legacy transformation at QEOP, has delivered on its pledge made in 2011 to be *"the first piece of legacy for east London, with the creation of 10,000 permanent new jobs"*³.

↓ Riverside East



QEOP has a growing night-time economy

Night-time activities have always played a role in the Legacy Area, particularly in areas such as Hackney Wick, where a series of repurposed industrial units and meanwhile-uses accommodate a cluster of evening activities. There is now a growing and increasingly vibrant night-time offer at QEOP, driven by assets such as ABBA Arena and The London Stadium, which have been developed through proactive programming and policy, which seeks to ensure activities are not detrimental to other uses, including the residential offer. Although QEOP is becoming increasingly vibrant, it will not be until East Bank and its bars and restaurants fully open in 2026 and the rich diversity of events start to take place that the full potential is realised.

Night-time economy at
Hackney Wick →



[2]

QEOP has created the conditions to support a number of growing specialisms in future-facing sectors.

Analysis of business count data, presented to the right, shows the economic specialisms within the Legacy Area relative to the average for London. Sectors with a higher concentration of business in the Legacy Area compared to London are denoted by a score of greater than 1.0 and can be recognised as specialised.

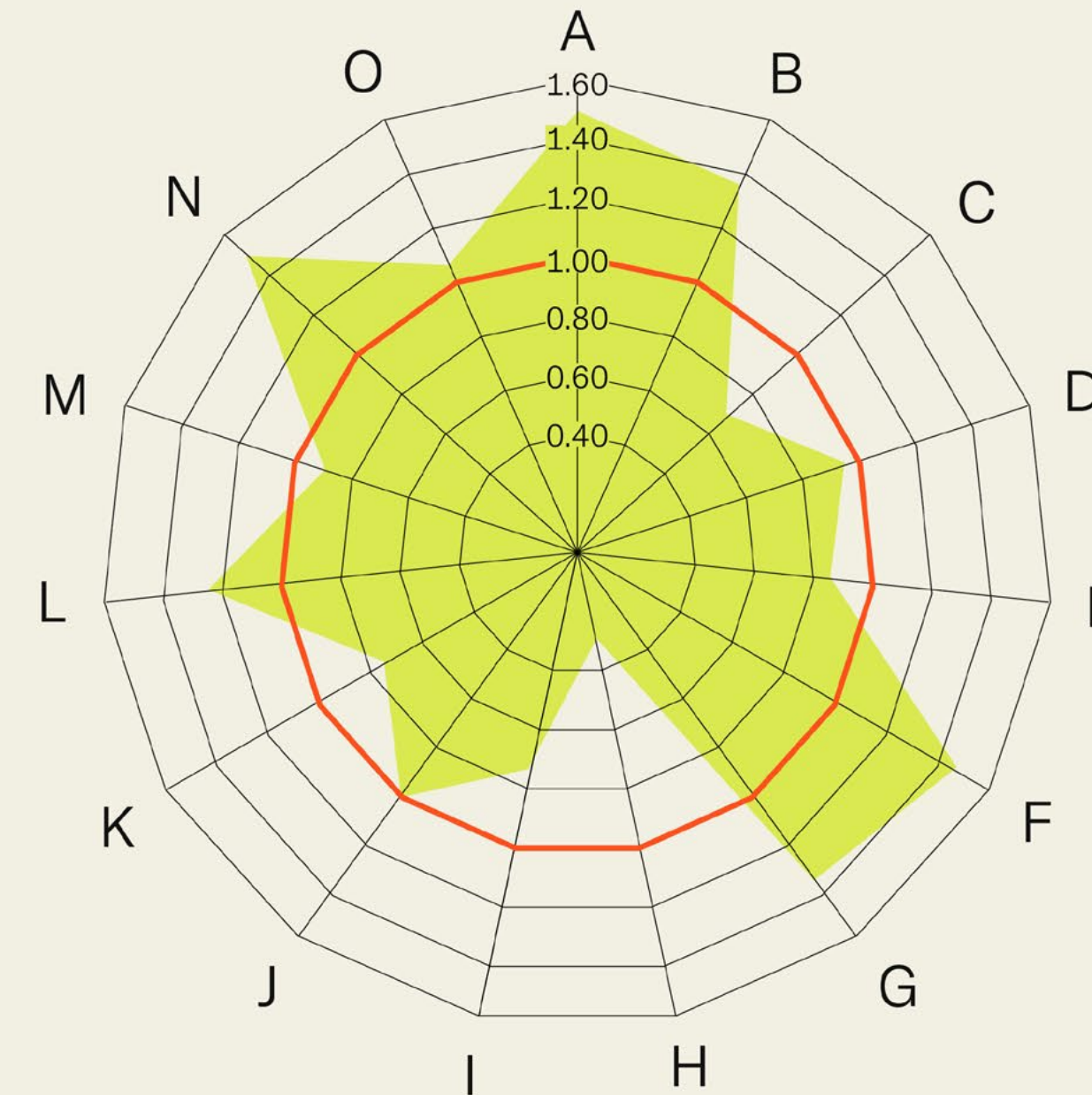
This analysis shows that the Legacy Area has a higher concentration of businesses operating in information and communication (1.37) and professional, scientific and technical activities (1.02). This cluster of economic activities is supported by the business incubators and e-sports cluster at Here East and Plexal, as well as the R&D facilities at UCL East and the cluster of head offices at Stratford Cross.

The Legacy Area also accommodates a high concentration of businesses in education (1.22) which can be attributed to the agglomeration of universities at East Bank and Here East, the primary and secondary schools delivered as part of the legacy transformation, and the vocational skills offering through initiatives such as Build East and Elevate.

The concentration of businesses operating in arts, entertainment and recreation (1.50) in the Legacy Area is also much higher than the average for London. The cluster of creative activities can be linked to incentives on offer at the Hackney Wick and Fish Island CEZ, which has experienced growth in the number of creative enterprises by 50% since 2016, and the internationally recognised cultural and educational institutions at East Bank, which fosters an attractive location for creative start-ups⁴. The activities associated with entertainment and leisure is driven by businesses at Westfield Stratford City and the Park's venues and attractions.

The offering of bars and restaurants at Westfield Stratford City, Stratford Cross and Hackney Wick, as well as accommodation at The Stratford and Snoozebox is supporting the Legacy Area's cluster of businesses in accommodation and food service activities (1.47). The provision of accommodation is helping to drive the visitor economy.

Maker-space in Hackney Wick, specifically in the Fashion District in The Trampery Fish Island, as well as innovative enterprises scaling solutions through the QEOP Innovation District are contributing to a modest, but above average, cluster of manufacturing (1.48) businesses in the Legacy Area.



Concentration of Business by Sector

- A : Manufacturing
 - B : Utilities
 - C : Construction
 - D : Wholesale and retail trade; repair of motor vehicles and motorcycles
 - E : Transportation and storage
 - F : Accommodation and food service activities
 - G : Information and communication
 - H : Financial and insurance activities
 - I : Real estate activities
 - J : Professional, scientific and technical activities
 - K : Administrative and support service activities
 - L : Education
 - M : Human health and social work activities
 - N : Arts, entertainment and recreation
 - O : Other service activities
- London Legacy Area

High Concentration of businesses in following sectors compared to London average:

- N : Arts, entertainment and recreation
- A : Manufacturing
- F : Accommodation and food service activities
- G : Information and communication
- L : Education

Low Concentration of employment in following sectors compared to London average:

- H : Financial and insurance activities
- C : Construction
- K : Administrative and support service activities
- I : Real estate activities
- M : Human health and social work activities

Source: ONS, UK Business Counts; Prior + Partners analysis

[3]

The Park has cemented its status as one of London's premier innovation districts, serving as a testbed where solutions are trialled, developed, tested, and scaled to address key global challenges.

Its ecosystem of assets, workspaces and programmes, supplemented by strong public transport and active travel connections, has created the conditions to attract a cluster of innovators. Innovation at QEOP is aimed at solving the following challenges experienced in urban environments:

- Responding to the climate emergency
- Boosting health and wellbeing
- Enhancing mobility

Maximising the QEOP's network of innovators, initiatives such as the Future Industries Demonstrator and Block Dojo are demonstrating how the Park is a testbed for business start-ups

to secure funding, workspace and connections to innovate, test and scale business ideas. With an array of flexible workspaces across QEOP, there is opportunity to provide the spaces and talent which allows these business start-ups to grow.

Business incubators at QEOP have facilitated a **41.6%** increase in micro-businesses (0-9 employees) across the Legacy Area since 2016. Over the same period, there has been an **82.4%** increase in small-businesses (10-49 employees) in the Legacy Area which have been accommodated in the Park's selection of flexible workspaces, including those at Stratford Cross and in the Hackney Wick and Fish Island CEZ¹.

QEOP has over 535,000 sqm of campus workspace to support technical innovations⁵. QEOP is home to the UK's largest innovation campus at Here East and Plexal, as well as 7 universities and an established network of research institutions, multi-national corporations, and small business

workspaces in facilities such as The Loop in Hackney Wick.

This agglomeration of assets at QEOP has created the physical spaces required to build and grow the knowledge intensive economy, which is responsible for delivering technical innovations. Utilising QEOP as a testbed has allowed for the safe rollout of innovations nationally and internationally. These assets play a role in the place-making of QEOP.

QEOP's network of private pathways and highways has accommodated a number of innovative transport modes, including autonomous shuttle buses and pods, and the first e-scooter rental scheme in the UK.

Here East is a dedicated campus for disruptors and visionaries which has enabled a culture of innovation. Exploiting the unprecedented space, connectivity and power of the former Media Centre for the Games, Here East provides a physical space containing a network of businesses and academic institutions which seeks to nurture culture, entrepreneurship and enterprise. Here East now accommodates **37 tenants** which **support 6,500 people working or studying on site** and attracting **30,000 visitors per year**⁶. These activities at Here East are estimated to generate **£700 million in GVA** for the UK economy per year⁶.

Here East has a concentration of businesses concentrated in digital innovation and technology. Information and Communication is the strongest contributor both in terms of employment (43% of the Here East total) and GVA (around 50% of direct impact) on the campus³. More specifically, there are sector specialisms in immersive technologies, artificial intelligence, robotics, and automation, driven in-part by the UCL Robotics Institute. The facilities and agglomeration of tenants at Here East has enabled innovation across QEOP.

↓ Here East Campus at QEOP





[Case Study]

QEOP Innovation District

Officially designated as one of three Innovation Districts in London, Queen Elizabeth Olympic Park acts as a catalyst for innovation, bringing together start-ups, businesses, community organisations and academics. Established on the 10-year anniversary of the 2012 Games, the Innovation District has an important role in facilitating the use of the Park, its assets, and its networks, to develop and trial creative solutions that tackle local and global challenges.

The Innovation District has grown rapidly from its seven founding members to over 200 cross-sector organisations. It is convened by the LLDC and backed by the Mayor of London and Central Government, University College London, University of the Arts London, Loughborough University in London, Lendlease, Plexal and Here East. To date, the Innovation District has fundraised over £3.2 million from a mix of public and private sector sources and a further £490,000 in in-kind contributions.

A key aspect of the Innovation District is to utilise the spaces at the Park as a testbed to foster collaboration and facilitate the trialling and prototyping of new ideas that address the climate emergency, health and wellbeing, and improve transport. The Innovation District has been proving its potential in convening regional, national and international programmes and events, including collaborations with Connected Places Catapult (Design to Deliver national testbed) and Horizon Europe partners (CORESpaces and Communicties).

Through the unique combination of physical infrastructure and amenities, combined with human capital, cultural, and educational institutions, QEOP has created the conditions for a prospering innovation ecosystem.

One such programme, funded by UK Government and Mayor of London, is the Future Industries Demonstrator (FID); the Park’s £1.86 million innovation testbed programme. FID supports Small and Medium Enterprises (SMEs) to accelerate and scale technologies that tackle London’s most urgent challenges. It does this by providing equity-free financial backing, dedicated trial-design workshops, bespoke connections to networks, access to workspaces, and local knowledge resources. By completion, it will have facilitated 20 innovation trials at QEOP since 2023.

FID invites cohorts of innovators under themes, such as Building Better, which aims to respond to the detrimental impact that poor indoor air quality, overheating, damp, and energy inefficiency within buildings can have on health and wellbeing.

The FID currently delivers:

- £455,000 in grant funding to SMEs
- 41 Knowledge Sharing Events
- Four Innovation Cycles providing expert innovation support to 15 SMEs.
- 15 businesses resident at the Loop Circular Economy Hub

After delivery of three cohorts, FID successfully provided business support to 215 SMEs. The 15 Cohort SMEs have increased revenue by an average of 43%, trained 84 individuals in green skills and diverted 125 tonnes of waste from landfill.

Looking forward, the Innovation District will continue to support cross-sectoral partnerships and R&D projects to activate the QEOP testbed and build the innovation ecosystem. This includes development of Digital Frontiers, an ambitious and innovative digital platform creating data-led solutions that bear commercial, community and environmental benefits.

[4]

QEOP's cluster of universities is working together to meet the skill needs of future growth industries.

Universities and educational institutions are seizing new opportunities in east London while cultivating a sense of place and community

Between Here East and East Bank, QEOP hosts campus facilities for **seven higher education institutions** and accommodation for **over 14,000 students**. These universities include a combination of London-based institutions and others from across the UK, seeking to expand their presence and diversify talent.

Whilst London's traditional universities, such as UCL, have historically concentrated in Central London, QEOP is rapidly emerging as a new hub for culture and education. Offering affordable real estate and access to a diverse local talent pool, QEOP allows universities to access modern facilities—which is increasingly for competing for talent internationally—and expand their offering with new courses.

QEOP also provides the campus space and

platform to allow the UK's regional universities to establish a presence in London. Like the universities accommodated at Here East, many universities are opening London campuses to enhance their appeal, specifically for international and postgraduate students.

The delivery of East Bank as a cultural and education district is designed to be an inclusive and welcoming location for both students and the local community. QEOP's universities are regarded as valuable

community assets who provide welcoming and accessible public spaces and buildings.

QEOP's universities are coming together to drive innovation and creativity

The cluster of universities at the Park offer **over 300 courses**, ranging from data science, cyber security and artificial intelligence to fashion design, performing art and robotics.

QEOP's universities are coming together to drive innovation and creativity. Through attracting a mix of universities to QEOP, this will provide a talent pool for both multi-national enterprises and business start-ups. Examples of such collaboration include Loughborough University London and D-Ford, who have been tapping into the university's academic expertise to support the innovation design hub for Ford Motor Company which aims to identify and address challenges for its commercial and passenger vehicles.

Building on the legacy of 2012 Paralympic Games, the UCL Global Disability Innovation (GDI) Hub is based at East Bank. The GDI Hub was founded through a partnership between LLDC, UCL,

Loughborough University London, London College of Fashion, UAL, Sadler's Wells, V&A, Helen Hamlyn Centre for Design, and Leonard Cheshire. This facility aims to make a positive difference to the lives of disabled people through co-design, collaboration and innovation. The GDI Hub operates in over 60 countries and collaborates with over 70 partner organisations.

These universities are also working closely with institutions across east London to support creative industries and performing arts. LMA is utilising theatre space across the Growth Boroughs, including Hackney Empire, Theatre Royal Stratford, Stratford Circus and Studio 92, to showcase student talents and provide opportunities for future collaborations and employment.

“

As the UK's newest cultural and educational quarter, East Bank must be truly rooted in the communities of east London. The Queen Elizabeth Olympic Park plays a crucial role in enabling these established institutions to embed themselves in these energetic and creative east London boroughs to develop new models of practice, invest in the skills and talent of the local community and ensure that opportunities are open and accessible.

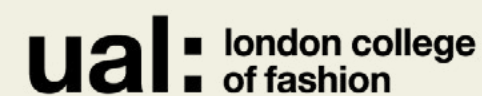
— Tim Reeve, Chair East Bank Board





UCL East

UCL, consistently ranked in the **top 10 universities in the world**, recently opened its new UCL East campus which accommodates **4,000 students and 700 staff** across One Pool Street, Marshgate⁷. UCL East delivers higher education courses and research in ecology, robotics, urbanism, culture, disability innovations, engineering, technology and human health.



London College of Fashion, UAL

The recently opened London College of Fashion, UAL campus at East Bank brings together over **6,500 students** studying fashion design, media and business as well as around **1,000 staff** under a single campus for the first time in its history⁷.



Loughborough University London

Exclusively for postgraduates and research, Loughborough University London works closely with influential thought leaders, pioneering researchers and creative innovators to deliver courses in business, technology, enterprise, media and design for over **800 students**.



Teesside University London

Opened in 2023 at Here East, Teesside University London is seeking to widen higher education participation through delivering courses on digital-focused programmes, general business studies, and e-sports and gaming.



University of Staffordshire London

University of Staffordshire London provides an offering of courses in gaming and cyber security. These courses are delivered in their Production Warehouse and laboratories at Here East in a collaborative environment alongside innovative businesses.



LMA, a leading institution in creative and performing arts, delivers degrees in the creative media, music and the performing arts sectors, with state-of-the-art facilities and tutors with a wealth of industry experience.



College of Esports

Located within the Lee Valley VeloPark, the College of Esports is a world-first university-level institution dedicated to the exciting and contemporary world of gaming and esports, offering **16 different courses** at Undergraduate-level.



Visitors destination, culture and sports

[1]

Olympic-standard venues are continuing to host professional, elite and international competitions for over 25 different sports.

[2]

Over 1,000 major concerts and entertainment events have been held in QEOP's venues.

[3]

Sport and culture on the Park generates £230 million of on-site visitor spend per year.

[4]

QEOP and its venues have made a significant contribution to creative and cultural production, with over 220 filming and event contracts per year.

[1]

Olympic-standard venues are continuing to host professional, elite and international competitions for over 25 different sports.

↓ Müller Anniversary Games at the London Stadium in 2019



→ UCI Track Champions League at Lee Valley's VeloPark



The QEOP is home to five Olympic-standard venues, accommodating regular global sporting events. This has included **over 200 West Ham United FC matches** across Premier League and European Competition at the London Stadium. It is the 7th largest sports stadium in the UK and sees the second highest average attendance in the Premier League. In addition to football, it has hosted the 2017 World Athletics Championships, 5 matches from the 2015 Rugby World Cup, the first Major League Baseball games to be played in Europe, and regular summer concerts.

The London Aquatics Centre is regularly used by Team GB Olympic diving, swimming and triathlon teams, and has been the site for a number of major events including the FINA Diving World Series, Super League Triathlon, as well as world Para events. It will also be the site for future British Championships to decide qualification for the 2028 Olympic Games in Los Angeles.

In addition, the Copper Box Arena has hosted close to 900 sporting events¹. It is home to the London Lions, the UK's best men's and women's basketball team who play up to 35 games a season at the venue. London Pulse, (one of only two professional netball teams based in the capital) also play up to 10 fixtures a season there, whilst it has accommodated a number of other elite level competitions including taekwondo, jiu-jitsu, boxing, indoor rowing and

skateboarding. The Copper Box Arena is also a leading destination for e-sports in the UK, having hosted over 200 events.

Lee Valley venues have also hosted over 30 major international tennis, hockey and cycling events and fixtures, drawing in over 660,000 attendees². The Lee Valley VeloPark accommodates a 6,000 seater velodrome, and was the first place in the world to offer four Olympic cycling disciplines in one location. It regularly stages world-level events including World Cups and World Championships. It hosted the track cycling for the Birmingham 2022 Commonwealth Games making it the only venue in the world to have hosted an Olympics, Paralympics, World Championship and Commonwealth Games in the same sport.

Alongside this, the Lee Valley Hockey & Tennis Centre - the only purpose-built Paralympic venue - has accommodated **ten major international events**, including NEC Wheelchair Tennis Masters, the FIH Hockey Pro League, the EuroHockey Championships, the Men's and Women's Hockey Champions Trophy, the Hockey World League semi-finals and the 2018 Vitality Women's Hockey World Cup which drew 120,000 spectators.³

On the whole, this illustrates the role and importance of the QEOP in contributing to Mayoral ambitions to become the global capital for major sporting events.



All venues are highly adaptable, hosting sporting and non-sporting events

A fundamental principle behind the QEOP Masterplan was to create ‘robust but flexible frameworks’ that could ‘adapt and evolve over time’. This is something that has been true of the all venues, and has made a key contribution to its continued sporting and cultural legacy not only in how they are designed, but how this has enabled them to accommodate a wide ranging offer¹¹.

In addition to the London Stadium highlighted in the following pages, the Copper Box Arena is one of London’s most flexible indoor venues, accommodating conferences, events and exhibitions and hosting fixtures for **over 15 different sports**.

The parkland also provides a flexible backdrop for numerous elite and mass participation sporting events, including Ride London, the Hackney Half

Marathon, the annual RunThrough Foundation Run, and the inaugural Women’s Run Series (2025). Whilst the waterways and the water sports pontoon at QEOP accommodates a range of rowing events, training sessions and corporate days.

Adaptability of venues has been key to ensuring the Park can deliver a successful sporting and cultural legacy. A key challenge with sporting infrastructure is its ability to optimise how regularly it is used, and integrating an offer that goes beyond sport has been vital to its success.

Linked to this, commitments to flexibility have been borne out through the delivery of numerous meanwhile and interim developments. In addition ABBA Arena, this includes Hackney Bridge, a creative hub and public destination providing a mix of workspace, event space, restaurants and bars. Frontside Gardens Skateboard and BMX Park was also an invaluable site built by and for the community, which held training sessions for girls and under-10s.

↓ Children’s hockey training at LVHTC



← London Pulse netball game at Copper Box Arena

[2] Over 1,000 major concerts and entertainment events have been held in QEOP's venues.

The ability to deliver entertainment attractions alongside a sporting offer has been central to LLDC's ambitions in drawing more visitors to the QEOP. QEOP hosts major events and celebrations such as an annual culture and community event held by LLDC in collaboration with partners, UK Black Pride, and the Halal Food Festival. In collaboration with East Bank partners, QEOP also hosts the Great Get Together which is a festival to celebrate music, dance, arts, sports and food which is supported by Westfield East Bank Creative Futures Fund.

One of the most prominent reflections of this has been ABBA Arena. This is a revolutionary high-tech concert, uniting digital with traditional music performance as avatars perform alongside a live 10-piece band. **With a capacity of 3,000, it has delivered around 900 shows since opening in May 2022**, drawing visitors from across the world. The show is performed at ABBA Arena, an innovative steel-framed mass timber development designed to be both demountable and re-usable. Planning permission was granted on the basis of the ABBA Arena being a 'meanwhile use', with the area earmarked to accommodate up to 1,000 homes.

In addition, the London Stadium boasts the largest floor capacity of any stadium concert venue in Europe (from engagement) and has hosted over 20 concerts with some of the biggest names in entertainment such as Guns N'Roses, Beyoncé, the Foo Fighters, and hosted the first African artist to headline a UK stadium, Burna Boy.

Whilst it is not the primary purpose of the venue, the **Copper Box**

Arena has also hosted in excess of 100 music, entertainment and charity events, such as 2015 Gospel Fest and BBC Sports Relief.

Future developments will support further events and concerts on the Park, through delivery of the BBC Music Studios and Sadler's Wells East, creating added capacity for hosting dance and music performances. It is important to note, however, that LLDC does not have an allocated programming budget, therefore space for events will be more limited as more developments on temporary sites come forward.

ABBA Voyage →
performance

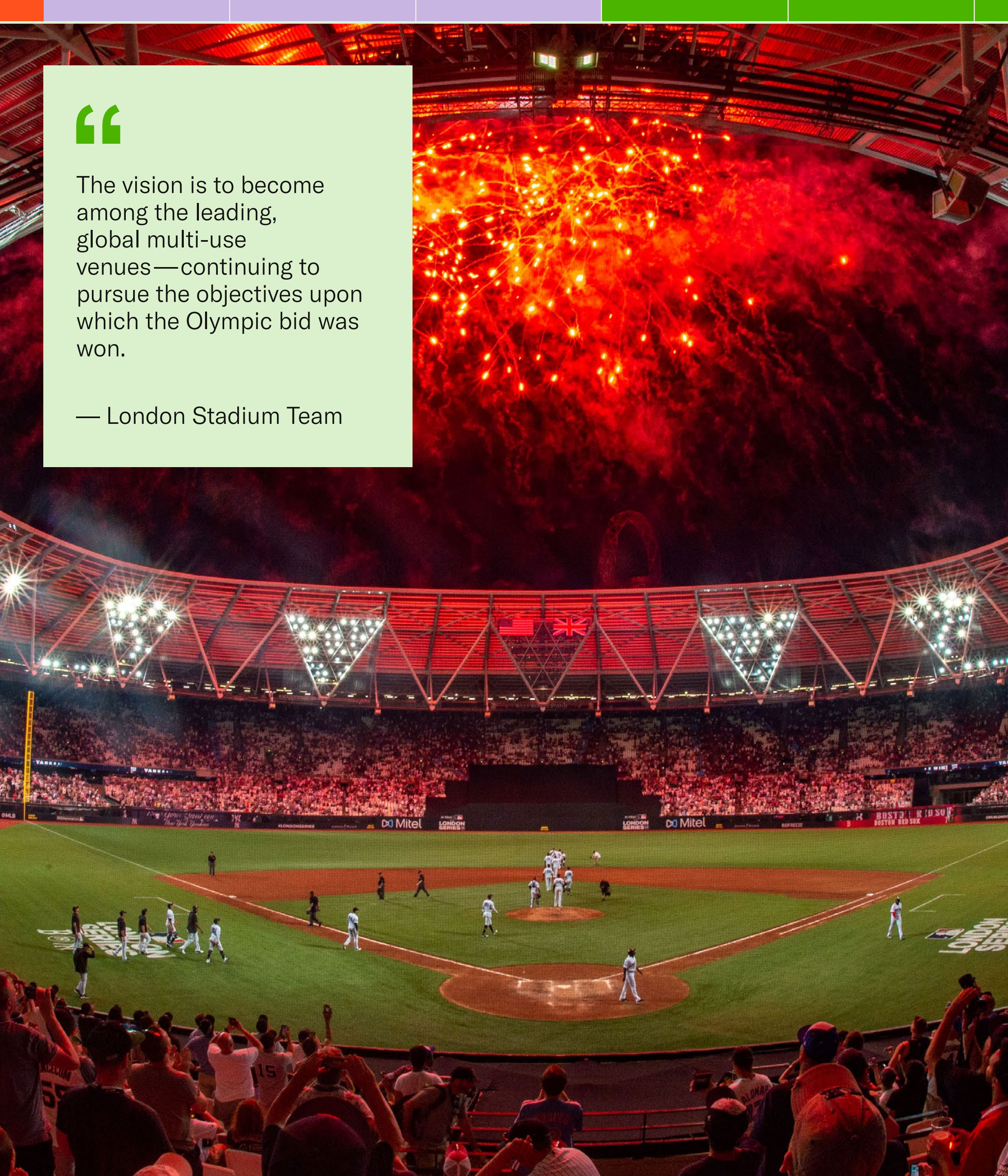
→
Foo Fighters at the
London Stadium in
2018





The vision is to become among the leading, global multi-use venues—continuing to pursue the objectives upon which the Olympic bid was won.

— London Stadium Team



[Case Study]

London Stadium

The London Stadium is the former Olympic Stadium, now home to West Ham United FC. Located on the south side of the Park, E20 Stadium Limited Liability Partnership (E20 LLP), which is a subsidiary of the LLDC, has overseen strategic responsibility of the London Stadium with London Stadium 185 (LS185) appointed to oversee day-to-day operation. The London Stadium has a capacity of 60,000 people for football games, but its reconfigurable lower tier allows for up to 80,000 people when hosting concerts or other similar events.

Designed to ‘embrace the temporary’, it has successfully reimagined how a stadium can deliver against the immediate needs of an Olympic and Paralympics Games, and the long-term ambitions for a multi-use venue across sport, culture and entertainment. The variety of events at the London Stadium draws a global audience.

11.5 Million

Visitors to the London Stadium since 2012

Since the 2012 Games, the various events previously noted have accommodated **over 11.5 million attendees⁴, with West Ham fixtures attracting over**

1.4 million fans per season⁵. It has also **hosted over 50 events** across athletics, baseball, motorsport and rugby union and rugby league.

In addition to hosting major concerts, it has played host to Monster Jam for the past 3-years, as well as various high profile charity events such as Soccer Aid.

The Stadium’s programme of events has also generated a hugely significant economic impact for London. For example, the 2017 IAAF World

Athletics Championships generated in excess of £100m of direct economic benefit for the city¹³; whilst the 2019, 2023 and 2024 MLB London Series accounting for a cumulative economic impact of around £140m for London¹⁴.

Whilst the delivery of world class events has been an undeniable success, there have been clear challenges relating to the financial and operational costs. The Moore Stephens review published in 2017 highlighted that E20 has been faced with substantial financial troubles, forecasting a cumulative deficit in excess of £140 million over the first 10-years of operation⁶.

Going forward, ambitions are to continue to capitalise on its versatility and position as a pre-eminent venue for London. The presence of the London Stadium has put the city in a strong position to accommodate major global sporting events in the future, with ambitions to host one at least every 10-years, including future Olympic Games.

As part of LLDC’s transitional arrangements, a Mayoral Decision has been made to change the ownership of the E20 LLP from the LLDC to Greater London Authority (GLA) Holdings Ltd. This change recognises that the GLA has ultimate funding responsibility for the London Stadium moving forward.

In 2025, they will be developing a new strategy for the London Stadium. Acknowledging some of the financial and operational challenges it has faced, it is intended that this will reflect what could be improved, and frame aspirations for the future.

Ultimately, there is a continued commitment to deliver against the aspirations set out by LLDC, whilst continuing to establish the site as a leading asset supporting London’s position as the leading sporting and cultural city in the world. Ambitions are also to think about how to better connect the stadium to the rest of the Park, and to create more of an everyday visitor destination.

[3]

Sport and culture on the Park generates £230 million of on-site visitor spend per year.

Ticketed events are a major draw of visitors to the Park. This is clearly illustrated when considering attendance insights from major events held across the Park. **ABBA Arena has attracted over 2.7 million attendees since opening in 2022.** In its first full year of operation, it attracted over 181,000 international visitors, and 556,000 visitors from outside of London⁷

Furthermore, 83% of visitors to the MLB London Series event in 2019 came to London specifically for the games, whilst quarter of attendees to MLB 2023 event came from the US. Similarly, only 1-in-3 attendees at the Rugby World Cup games lived in London⁸.

In contrast, a survey of 6,000 Park users found **visitors tend to use the Park ‘as a park’, with those from further afield far more likely to come to the Park for ticketed events⁹.**

Major events such as these have been invaluable in boosting public perception not just the Park but also London as a visitor destination. Following the IAAF World Athletics Championships, 82% of attendees said events had strengthened London’s image as a tourist and business destination (IAAF Impact Report, Surveys of approximately 900 attendees), whilst 97% agreed it had showcased London as a positive, vibrant city¹⁰.

Given more recent scaling of major entertainment events at the London Stadium, as well as a general need for venues to generate revenue from a diversified offer, this should create confidence in the QEOP’s ability to act as an invaluable resource for the local and city-wide visitor economy.

By attracting such a high number of visitors, the Park has generated **£230 million in on-site visitor spend per year**, providing a major contribution to the local and city-wide economy.

The venues and associated visitors account for a considerable proportion of that spend, with operators of LLDC venues on the Park (Copper Box Arena, London Aquatic Centre, ArcelorMittal Orbit), events and F&B outlets generating **£77.8 million in net income since 2014⁴**. The venues themselves account for 84% of this figure, translating to net income of £6.5 million per year since 2014⁴. The ArcelorMittal Orbit, whilst not quite attracting the visitor numbers envisaged, has generated close to £1.2 million in operator income per year¹².

Income is further boosted by filming on and off-site. Film and TV production at 3 Mills Studios generating over **£5m per year in revenue, generating approximately £1.2 million in profit.**

Looking ahead, there is an ongoing need to refresh the Park’s offer and keep visitor numbers high. Plans include integrating the longest zipline in the UK at the ArcelorMittal Orbit and cluster this with new attractions every other year, exploring opportunities to further boost the visitor economy and generating secondary spend.



Venues currently support over 400 jobs, and have provided 44 apprentices over the past decade.

In addition to providing a platform for sport, culture and entertainment, the Park and its venues are a valuable contributor to the local economy in terms of employment. As of 2024, **QEOP venues support 435 FTE jobs**. This figure is likely significantly higher when accounting for part-time employment supporting competitions and events held across the Park. All LLDC venues are London Living Wage employers, with the London Stadium one of only a handful of sports stadiums to adopt this policy.

The Copper Box Arena and London Aquatics Centre contribute the most to this figure, employing 256 people combined. A large proportion of these employees are local, with **86% Growth Borough residents, whilst 48% are from ethnic minority groups**¹².

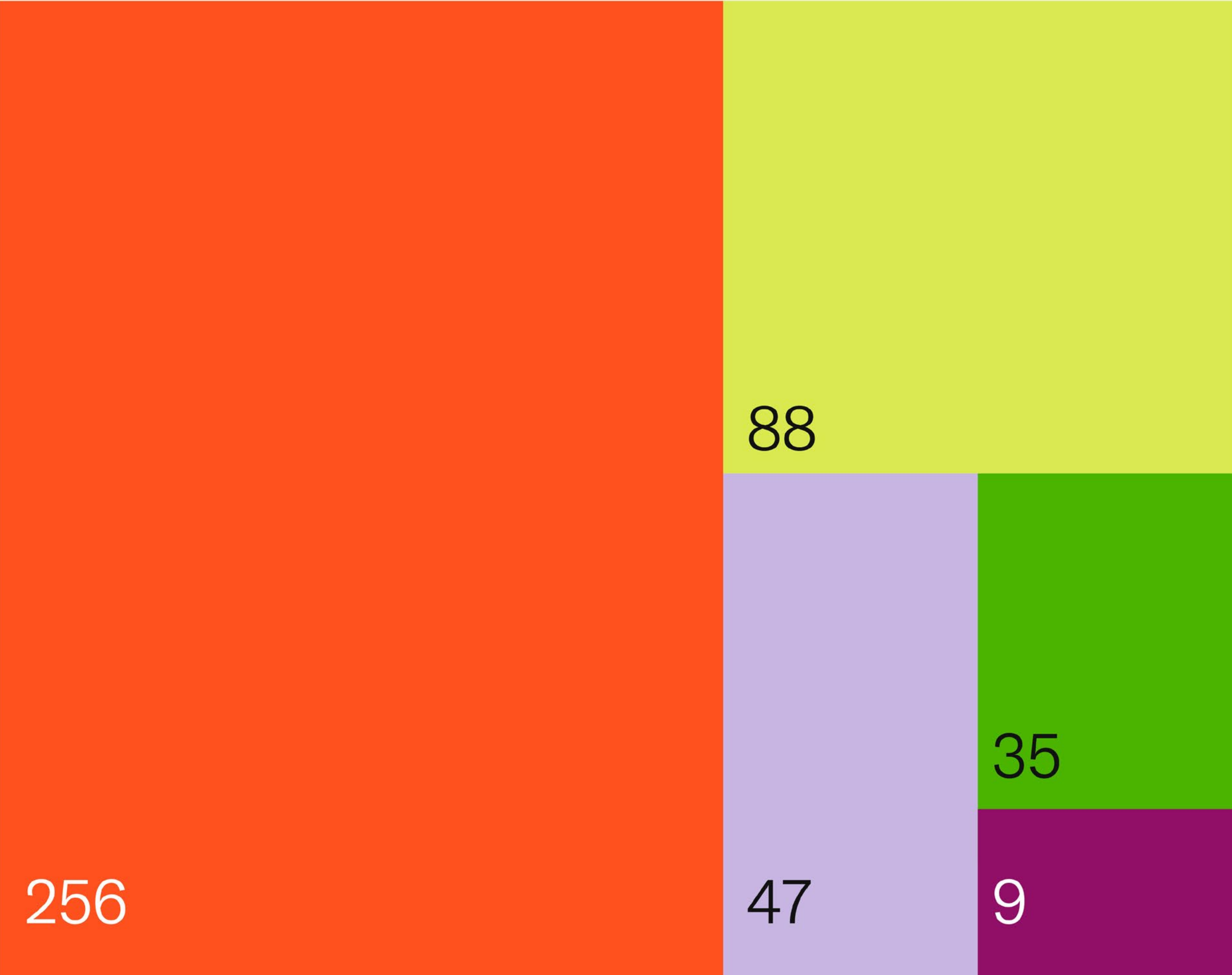
Furthermore, ABBA Arena supports 88 FTE employees. Research published in 2024 demonstrated that these jobs generate the single largest amount of social value from their events (£981,000), through reducing unemployment and creating opportunities for valuable creative industries⁷.

In terms of apprenticeships, Park venues, as well as sport and leisure activities have supported 62 apprenticeships since 2013. This represents 10% of all apprenticeships delivered across the Park, with the majority (69%) through construction activity¹².

Full Time Employment: QEOP Venues

- London Aquatics Centre & Copper Box Arena
- ABBA Arena
- London Stadium
- Lee Valley VeloPark
- Lee Valley Hockey & Tennis Centre

Source: LLDC data; Future Places Studio analysis



[4] QEOP and its venues have made a significant contribution to creative and cultural production, with over 220 filming and event contracts per year.

The *Events and Programming Strategy* (2012) and the *LLDC Arts and Cultural Strategy* in 2014 set out the structure to deliver the corporate objectives, ambitions and approach to establish QEOP as a key cultural and creative destination.

The Park itself is used across three different areas:

- 1 events and filming;
- 2 brand activation; and
- 3 interim uses.

As the Park has evolved, so has the delivery of events. 2018 saw the final uses of major development plots, which had been used to host events like Beach East, Shell Eco Marathon, Oktoberfest and the moving art installation Shrouds of the Somme, attracting over 80,000 visitors. With the developments of these plots, the focus shifted to commercial, charitable and community events for external and Park Partners, such as East Bank and other on Park organisations. In 2024, QEOP hosted content from Greenwich & Docklands International Festival: Dancing City, London Mural Festival and local Waltham Forest organisation Revel Puck Circus.

The park has accommodated a number of award-winning TV productions for Apple TV (*Slow Horses*), Netflix (*Top Boy*): enabled by its unique site that can overcome many of the restrictions imposed in central London locations.

The strength and adaptability of the events and filming team has been another key factor in its success. With a high number of events held on development plots, spatial constraints have changed considerably over the past 10-years. Despite this, delivery standards have been high, consistently exceeding income targets.

This is further supported off-site by **3 Mills Studios**, London's largest film and TV studio on London's oldest surviving industrial centre. One mile to the south west of the QEOP, it was acquired as part of the Games to host rehearsals teams for the opening and closing ceremonies.

Production supports TV and film, in addition to theatre, music and advertising including productions by the Royal Shakespeare Company and English National Opera (*Matilda*, *La Boheme*) and music videos for Ed Sheeran and Beyoncé. It also provides a valuable site for SME's and creates significant local employment and inward investment.

Alongside the success of ABBA Arena, in many ways this has laid the platform for QEOP as a globally significant cultural destination. Going forward, the opening of East Bank, the biggest ever cultural investment by the Mayor of London, will only serve to further support that.

In tandem, the QEOP is a hugely important resource for the regional cultural and creative economy. East London is a significant contributor to the Thames Estuary Production Corridor, with aspirations

to accommodate 50,000 jobs and become the UK's largest concentration of creative production. Sustaining good quality infrastructure for the screen industries will be central to this ambition.

↓ Three Mills Studio

“

London's largest film and TV studio, 3 Mills Studios is one of east London's greatest creative success stories.

— CEO of Film London and the British Film Commission, Adrian Wooton



Environment and sustainability

[1]

A new type of urban park designed for people and nature to seamlessly coexist.

[2]

Mitigation and resilience to climate change are embedded into all aspects of the Park.

[3]

The Park fosters sustainable practices and lifestyles.

[1]

A new type of urban park designed for people and nature to seamlessly coexist.

QEOP is the largest new urban park to be created in the UK for over a century. Once dominated by gas works, tanneries, and factories, with highly polluted waterways, and contaminated land; the Park today consists of **226 hectares** of green and open space, **nearly 10x the size of St James' Park**. It has successfully transformed and delivered a rich new landscape of natural habitats, restored waterways, and green spaces. Since 2012, the Park has won **eleven consecutive Green Flag Awards⁶**—the international accreditation which rewards well-managed parks and spaces. It is also a major node of connection with a wider green infrastructure north into the Upper Lee Valley and to the River Thames and Royal Docks.

Unlike other traditional metropolitan parks across London, QEOP presented an opportunity to plan from the outset and deliver a new type of park – an urban park – which had a green infrastructure approach at its heart. This means that the Park combines diverse forms of green infrastructure, ecosystem services provided by biodiversity and flood water storage, climate change resilience, and delivers amenities for residents and visitors. Creating the Park was one of the first regeneration phases of the 2012 Games. ‘Starting with a park’ was a key principle of the regeneration process and the parklands were used as a development asset, helping to increase land

values and generate investor interest in development sites.

QEOP has and will always be designed to deliver urban communities, attract visitors, and restore habitats. This planned approach has meant that it has succeeded at balancing requirements of both local residents and visitors as well as the biodiversity needs, some of which are inherently conflicting.

This balance has been achieved through delivering diverse and well-integrated landscapes. The parkland was intentionally designed to be split into two main areas, each serving distinct functions. The North Park provides a landscape of wetlands, woodlands, and wildflower meadows surrounding the River Lee, where biodiversity is concentrated. The South Park contains gardens and meadows, which are integrated into the urban environment.

The division of the Park into diverse landscapes welcomes diverse users and helps it support activities from sports, play, to events and food growing. QEOP comprises **52 allotments** and **two community gardens** giving local communities spaces to grow their own food, learn gardening skills, and engage with nature¹. However, despite emphasis on inclusivity in the Park’s design, some studies have reflected on the under-represented use of the Park by ethnic minority groups. The ecological and naturalistic landscape of the Park and few programmed spaces have been found to be less welcoming to these groups, although recent studies show increasingly diverse audiences.

As developments comes forward, there is a need to carefully balance demands on green spaces provided by LLDC and the LVRPA. In some cases, developments have relied on open space provided by the LVRPA to meet their open space requirements, in lieu of delivering additional open space, placing it under additional pressure.



[Case Study]

Developing a sense of ownership 'Park Champions'

A Community Interest Company (CIC) was established to help deliver the legacy of the Games and involve the community in the management the wildlife, parklands and gardens. Volunteers—known as 'Park Champions'—have recorded **110,000 volunteer hours** since 2015¹.

A proactive approach to volunteering and community engagement has ensured that local people have benefitted, while developing a sense of ownership.

As the Park evolves and gains a greater diversity of users, there is opportunity for increased collaboration with universities, community groups, and conservation NGOs to provide ecological data to inform management decisions for the Park, by those who know it best. Projects such as 'Echo Boxes' led by UCL's new People and Nature Lab, which established the world's first automated smart detectors for monitoring bats through their echolocation calls, are feeding into real-time understanding of the Park and biodiversity. This will strengthen a shift to an 'evidence-based' approach to Park management.





Over 20% of the Park provides mature habitats to enhance biodiversity, wildlife and climate resilience.

Approximately **49.0 hectares** of diverse habitats have been delivered across **10 habitat types** including woodlands, wetlands, meadows, parklands, gardens, and brownfield habitats. An additional **6.2 hectares** of temporary habitats have been delivered

and a further **7.9 hectares** are expected as part of emerging schemes². A range of habitat types were selected reflecting the diversity of the site prior to construction and ambitions to diversify habitats and species.

From the original phase for the 2012 Games to the transformation works, **15,343 trees** of all sizes and 2,616 specimen trees (30cm girth plus) were planted. Effective maintenance has meant that only 36 trees have been lost and ensured a lasting legacy of the Park³.

Habitat installations were built into the Park to encourage animal species, notably the **28 priority species** identified. Habitats have matured to now host a wide range of plant and animal species. However, biodiversity improvements have been somewhat held back by wider systemic issues such as the River Lee pollution from overflow and surface water runoff and the impact of the urban fabric.

The diversity of habitats also provides ecosystem services and climate resilience. The wetlands, which comprise of **300,000 wetland plants** from 28 species, are a carbon sink, provide enhancements to water quality, and water storage¹. They are designed to flood when water levels rise, protecting the Park, its venues, and surrounding properties.

[2]

Mitigation and resilience to climate change are embedded into all aspects of the park.

The 2012 Games were billed, and delivered, as the ‘Greenest Games’ in history and the original design of the Park set sustainability standards which were industry leading. A number of climate resilient features, and in recognition that the built development itself is a major contributor to the climate emergency, a number a carbon offset measures, have been implemented across QEOP to manage development coming forward. This has become increasingly important as in recent years as the Park has faced higher temperatures, overheating in homes and increased rates of flash flooding. As such, QEOP has sought to implement a series of ambitious measures to enhance resilience and minimise the exposure to the climate emergency.

In 2024, LLDC made a conscious shift away from this legacy-led approach to a science-based target approach for its trajectory to net zero. A science-led approach, documented and monitored through a Climate Action Strategy, will now ensure that LLDC better responds to political and science-based targets, which is particularly important as a continuously evolving matter. Greater emphasis is being placed on measuring impacts, recognising the importance of monitoring measuring the impacts of climate measures in encouraging further investments.

Climate Action Strategy Targets

61%

Net zero carbon in 2030 from LLDC controlled emissions. Emissions will be reduced by 61% on 2022 levels, and residual emissions will be offset.

90%

Net zero carbon in 2038 from value chain. This will generate a 90% reduction in emissions.

“

With numerous state-of-the-art innovations in areas from water management, ecological restoration and material specification to the fact that spectators arrived only by public transport, the park anticipated many areas of good practice we see today.

— Jason Prior, Masterplanner of the 2012 Olympic Park and QEOP



Low carbon and climate resilient infrastructure has been delivered at scale.

A number of climate resilient features were also inbuilt in the original design of the Park. This included that the north of the Park is designed to mitigate against a 1-in-100-year flood event (including 20% additional allowance for climate change), and widening of the River Lee now protects over 5,000 homes in the lower Lee Valley from flooding⁴.

Sustainable generation and use of energy has been a theme from the original Olympic Park plans onward. The most significant aspect of this plan was a large-scale central heating system known as a district heat network. This includes two energy centres which together form the largest district energy network in the UK. The network provides low carbon heat to all venues and new communities within the Park, East Village, Westfield Stratford City, and the Stratford Cross commercial district. Developments outside of the original planned area are now also connected to the network.

However, the district network has presented some challenges. Since its development, there have been legislative requirements to decarbonise the grid and reach net zero. Plans are being put in place to decarbonise the energy provided by the two energy centres. Furthermore, the cost of heating

from the district network is perceived as being disproportionately high. Residents of Chobham Manor have expressed issues with expensive bills, particularly as a result of the standing charge costs¹.

LLDC have implemented park-wide waste management and reuse strategies, as reducing the environmental impacts from waste is key priority. Municipal waste is diverted from landfill by either energy recovery from waste (~40%), recycling, or composting.

The environmental impact of construction has also been mitigated through waste management and diverting waste from landfill through reuse or recycling, as well as the reuse of existing buildings, and use of recycled materials and aggregates in construction (including building materials from buildings that had to be demolished). Many buildings built for the Games have been re-used by LLDC, for example, the Press and Broadcast Centre for the Olympics now houses Here East.

← Olympic Park Splash Foundations

Built development in the Park sets industry leading standards for sustainability

Sustainability is built into all developments across the Park with measures in place to ensure low embodied and operational carbon and reduce operational emissions of existing venues.

QEOP has established new industry benchmarks for embodied carbon. Phase 1 of the East Wick+ Sweetwater development (2018-2022), LLDC has achieved 25.4% lower embodied carbon in construction than industry baseline, performing better than the target of 15%⁵. Careful design considerations, contractor engagement, material choice and construction techniques contributed to lower embodied carbon.

Building on this progress, LLDC prepared detailed guidance on good practice design for low embodied carbon, as part of its ‘Preparing for a 1.5°C future’ strategy. This set targets for embodied and operational carbon which new developments by LLDC must meet, in order to meet prepare as part of securing a 1.5°C-aligned future.

LLDC has been working hard to reduce emissions from existing buildings and venues. Emissions from LLDC-owned venues have reduced by 65% between 2015 and 2022 (excluding the Stadium)⁵. However, across QEOP, progress towards reduction in carbon emissions has been slowed by energy demands from larger venues (including the London Stadium, the London Aquatics Centre, and the Copper Box Arena) and by the majority of energy sources across QEOP locations continuing to be fossil fuel based.

To address this, in 2024 the London Stadium gained approval for 6,500m² solar membrane panels to be installed on the roof. More than 850,000-kWh of electricity is expected to be generated per year, generating enough solar energy to power all Stadium concerts and major events throughout the year; making it one of the greenest stadiums in the world, and will save more than 200-tonnes of carbon emissions a year⁶.



Ambitious planning guidance through the LLDC has ensured new developments are designed to minimise energy consumption and carbon emissions with building regulation targets exceeding national standards. LLDC have built over 1,000 homes to this standard through high-performance design and construction methodology⁶. This means that residents benefit from sustainable and efficient homes; across the Park, 72.5% of homes have highly efficient ratings (Designated A and B) far exceeding the 17% London average⁷.

LLDC established an innovative fund, the Carbon Offset Fund, which has distributed £4.8 million across four carbon offset projects⁸. Developments that do not meet the zero carbon target, developers are required to offset that gap either through off-site measures or making a payment to the fund.



[3]

The Park fosters sustainable practices and lifestyles.

The Park has been designed for residents, visitors, and businesses to develop and adopt sustainable practices. The density of buildings and amenities, which are well connected by an extensive network of cycle routes and pedestrian pathways and public transport, encourage sustainable and active travel. The scale of green space embedded within residential communities also supports healthy lifestyles and wellbeing.

Through providing a welcoming and vibrant setting for both living and working, the Park enhances quality of life by promoting healthy lifestyles and providing opportunities for recreation, leisure, and play. Its green infrastructure is composed of various elements, including amenity green spaces, green corridors, allotments, trees, gardens, green roofs, swales, and a diverse range of habitats.

Collectively, these features provide extensive benefits that contribute to the Park's Natural Capital, which is defined as *"the elements of nature that directly or indirectly produce value to people, including ecosystems and species, as well as natural processes and functions"*⁹. An example of this at QEOP is the Wetland Bowl, a vital component of the green infrastructure designed to manage rising water levels

by flooding when necessary, safeguarding the Park, its venues, and nearby properties.

LLDC and resident businesses lead community engagement and education programmes centred around sustainable lifestyles to promote learning, knowledge sharing and behaviour change. The clustering and collaboration of businesses and institutions concerned with sustainability in the Park has accelerated innovation and implementation of climate change solutions, such as the Fair Energy Campaign.

↓ Running event at QEOP



Tackling barriers to renewable energy usage

The Fair Energy Campaign led by Loughborough University London based at Here East and in partnership with citizens UK, Octopus and London Power worked to identify and scale-up interventions to support household switching to renewable energy, aimed at reducing energy related carbon emissions within QEOP. It targeted wider audiences including visitors, businesses and residential communities across the Park and the Growth Boroughs.



03 Looking Forward



This is just the beginning

[1]

QEOP is poised for greater impacts as it enters into a new phase of activation and optimisation.

[2]

The activation and programming of QEOP is expected to deliver an additional 10,000 full-time jobs and generate a further £600 million in GVA per year by 2030.

[3]

East Bank is the single largest investment in arts, culture and education in London for a generation.

[4]

East Bank's partner institutions have already been working to establish a presence across the Growth Boroughs.

[5]

QEOP has built strong foundations to transition to a fairer and more inclusive economy that drives continued prosperity across the surrounding Boroughs.

[1]

QEOP is poised for greater impacts as it enters into a new phase of activation and optimisation.

The development of QEOP can be viewed in three phases, which commenced at the turn of the millennium where Phase 1 involved establishing the vision of delivering an impactful legacy, preparing the site and hosting the Games.

Phase 2, which is now drawing to a close, comprised the transformation of the Park as the site shifted from 'hosting' to 'legacy'. Overseen by LLDC, venues were adapted into multi-purpose facilities for both the local communities and sporting events. Other infrastructure was also adapted and repurposed in line with achieving the vision, notably the Media Centre which became Here East and the Athletes Village which became the East Village community. Other parcels of land, such as East Bank, Stratford Waterfront, East Wick + Sweetwater, Chobham Manor, Pudding Mill Lane and Bridgewater Triangle, and Rick Roberts Way, were brought forward for mixed-use developments.

As Phase 2 draws to a close and we move into Phase 3, there is an increased focus on the experience of QEOP. High-quality place-making and a unique identity has created a focal point for east London which combines visitor experience with being a place of work, learning and innovation. With the majority of legacy developments delivered, under

construction or consented, Phase 3 will see the further activation of QEOP, most notably through opening of East Bank's cultural and educational institutions. Programmes developed and established by LLDC will continue to grow with increased independence and autonomy, shifting the focus from 'inclusive growth' to a functioning and sustainable 'inclusive economy'.

Phase 3 of QEOP is dependent on collaboration and mutual aspirations of partner institutions. Opportunities in Phase 3 are characterised by the following three themes:

- **Delivery of the remaining consented developments at QEOP:** The pipeline of remaining developments will provide further employment opportunities for local residents and facilitate continued economic growth at QEOP.
- **Completion and activation of East Bank:** The opening of V&A East, Sadler's Wells East and BBC Music Studios, alongside the already operational UCL East and London College of Fashion, UAL, will see a diverse programme of events and activation.
- **Delivering an inclusive economy:** Equipped with the assets and infrastructure, QEOP is shifting from inclusive growth to an inclusive economy that delivers community benefits and local empowerment.

Whilst the role of the LLDC has evolved as QEOP moves into its third phase, the MDC still has a pivotal role to play as a landowner, convener, and collaborator. LLDC will also continue to bring a wealth of local knowledge, experience and lessons learnt to help shape the ever-evolving future of QEOP.

Riverside East →
at QEOP





[2]

The activation and programming of QEOP is expected to deliver an additional 13,200 full-time jobs and generate a further £2bn in GVA per year by 2035.

Whilst the legacy transformation at QEOP has already shifted London's economic centre of gravity eastwards, the activation of East Bank, a growing night-time economy, and the future pipeline of planned and consented developments will further stimulate economic growth in east London.

Further agglomeration of innovation businesses, a growing cultural and creative sector, and the delivery of the final phases of East Wick + Sweetwater, Pudding Mill Lane and Bridgewater Triangle, Sugar House Island and Hackney Wick and Fish Island will support a **further 13,200 direct FTE jobs** at across the Legacy Area by 2035. These employment opportunities are expected to generate a further **£2bn** (2024 prices) in GVA each year. Whilst it is recognised that some additional employment would have likely occurred regardless of the post-Games transformation, the interventions and vision of the LLDC and its partners is seen as the primary driver of this growth.

This economic growth is expected to bring the overall FTE employment in the Legacy Area to **51,500** by 2035, generating a total of **£5.5 billion** (2024 prices) in GVA per year. More specifically, It is estimated that **6,300** of the new employment opportunities created by 2030 will be taken by Growth Borough residents, providing additional annual earnings of **£282 million** (2024 prices) per year. These employment opportunities are expected to comprise a mix of retail, creative industries, hospitality, service sector and educational roles. The range of occupations on offer will accommodate roles for variety of local residents and provide secure and good quality work.

By 2035, it is estimated that the Legacy Area will support **107,700 FTE jobs** across the UK, which would generate an annual GVA contribution of **£12.8 billion** (2024 prices).

In addition to secure and good quality employment opportunities, an inclusive economy also requires access to secure and genuinely affordable housing. Across the pipeline of developments at QEOP, there are **10,800 new homes** awaiting delivery of which **3,400 are affordable**.

The next phase at QEOP will deliver an additional 13,300 jobs across the Legacy Area and generate an additional £2.0 billion in GVA annually by 2035.

A platform for growth has been created but continued growth will need to be matched with ongoing investment, adaptation, and future-proofing.

Bespoke analysis undertaken as part of this commission has sought to project future economic potential up until 2035. Based on an understanding of the final phases of LLDC developments, the aspirations within the London Growth Plan to increase productivity, and the potential to strengthen agglomeration of innovation businesses and the growing cultural and creative sector, the analysis demonstrates that by 2035 QEOP will deliver an additional 13,300 FTE jobs across the Legacy Area and generate an additional £2.0 billion in GVA annually by 2035.

The impacts have a wider reach extending to east Londoners and beyond, supporting 22,500 jobs in the Growth Borough by 2035.

Whilst this research has highlighted the significant investment in infrastructure and assets across QEOP and how successful it has been in creating the conditions for growth, this is something that must remain under constant review. Whether that means ensuring the Park and its assets respond effectively to the climate emergency, or making sure infrastructure and assets respond to the needs of local communities, ongoing attention is essential.

The challenges of successful growth are already visible at QEOP, notably at Stratford Station. Often underplayed in terms of its contribution to the Legacy Area and wider sub-region, Stratford is currently the fastest growing station in the UK. It is a critical access point for local residents and commuters, and a key factor attracting businesses to the area. However, the station is quickly becoming a constraint, with high levels of passenger crowding reaching unsustainable levels. Investment is required to ensure the station can accommodate further growth at QEOP and continue to support the wider sub-region.

[Total by 2035]

107,700
FTE jobs

£12.8bn
GVA

[London and beyond]

33,700
FTE jobs supported outside of the Growth Boroughs in the supply-chain and through spending by 2035

£4.4bn
GVA generated outside of the Growth Boroughs per year in the supply-chain and through spending by 2035

[Growth Boroughs]

22,500
FTE jobs supported in the Growth Boroughs in the supply-chain and through local spending by 2035

£2.9bn
GVA generated in the Growth Boroughs per year in the supply-chain and through local spending by 2035

[Legacy Area]

51,500
Direct FTE jobs within the Legacy Area by 2035

£5.5bn
Direct GVA generated in the Legacy Area per year by 2035

Source: Prior + Partners analysis; ONS, BRES; LLDC data; ONS, Input-Output Multipliers; ONS, Regional gross value added (balanced by industry); ONS, Workforce jobs; GLA, Long-Term Labour Market Projections

[3]

East Bank is the single largest investment in arts, culture and education in London for a generation.

10,500

Students and staff to be based at East Bank.

1.5 million

Expected annual visitors to East Bank.

600

New homes to be delivered at Stratford Waterfront.

Situated across two sites being Stratford Waterfront and UCL East, East Bank will be a new home to three world-renowned cultural institutions as well as two globally recognised universities which will be connected by 15,500 sqm of new high-quality public space^{3, 4}.

The project represents an **overall investment of £1.1 billion, including £600 million from the Mayor of London which is London’s largest cultural investment ever made³**. A further £170 million has been committed to the scheme by the UK Government⁷. Further leveraging the legacy of the Games, this

investment will create a new cultural and education district of national significance, firmly rooted in the cultures and communities of east London.

Inclusion and diversity are principles that have been embedded at East Bank since the project’s inception. During construction, East Bank exceeded pre-agreed targets on Growth Borough, female and ethnic minority construction workers.

Across the partner institutions, there will be approximately **2,500 FTE jobs** generated by East Bank, including construction jobs³. In addition, the Shared Apprenticeship Programme is set create 220 apprenticeship opportunities⁵.



BBC Music Studios

Due to open in 2026, East Bank will be the new **8,000 sqm** home of the BBC Music Studios, which will include new state-of-the-art recording studios for the BBC Symphony Orchestra & Chorus and live sessions for BBC Radio 1, 2, 3 and 6 Music⁶. It will also accommodate the BBC’s education and outreach programmes.



V&A East

V&A East comprises two complementary sites at QEOP. The V&A East at East Bank, opening in spring 2026, includes a main exhibition hall and two collection galleries. There will also be dedicated galleries showing east London’s creative and manufacturing heritage. The V&A East Storehouse at Here East, opening in spring 2025, provides a purpose-built home for half a million works from all creative disciplines.



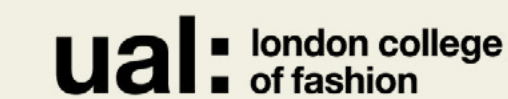
Sadler’s Wells East

The recently opened **8,000 sqm** venue includes a 550-seat theatre, six studios and research, development and production facilities⁶. The facility will be home to the UK’s first Centre for Choreography and a Hip-Hop Academy. Sadler’s Wells East will complement the organisations existing venues in the capital and cement London as the world’s dance capital.



UCL East

Representing the largest expansion of University College London in 200-years, UCL East will eventually accommodate over **4,000 students** across its Marshgate I and Pool Street West sites⁶. The university campus includes state-of-the-art academic floorspace that will bring together cross-disciplinary expertise from the arts and humanities, engineering, design, culture and social sciences. Embedded in the local community and business environment, the campus provides an environment to foster collaboration and transformative research and development.



London College of Fashion, UAL

Operational since 2023, UAL's London College of Fashion campus at East Bank is a new **36,000m²** education and research hub that brings together **6,500 students and 1,000 staff** in a single location for the first time in the institution’s more than 100-year history⁶. The campus includes two major research centres focusing on sustainability and innovation in fashion. It also provides access to advanced fashion technology, business incubators, and an evolving programme of public exhibitions.



The clustering of cultural and educational institutions at East Bank provides a significant opportunity for its partners to access east London's untapped potential

East Bank will be the first time that these globally recognised cultural and educational institutions have had a permanent presence in east London. Their presence in east London presents a major opportunity for Growth Borough residents to have better access to programming, cultural events, training and employment opportunities whilst providing the institutions with access to a relatively untapped audience and diverse talent pool.

The fundamental objective of East Bank has been to ensure a lasting legacy for residents of the Growth Boroughs. Since the inception of East Bank, the five partners embarked on a package of collaborative outreach programmes to begin to emerge themselves and establish a more visible presence across the Growth Boroughs.

Since 2015, a diverse range of programmes have been launched by East Bank partners and other partners under the New Talent Future Leaders (NTFL) programme, including the Shared Training & Employment Programme (STEP), a 12-month paid traineeships in entry-level cultural roles at partner institutions, teacher development programmes, the Creative and Cultural Opportunities Programme (CCOP), a Schools outreach programme, the East Summer School. Separate, targeted outreach programmes by individual East Bank partners have also been launched.

As of 2023, more than **40,000 young people** from more than **300 colleges, schools and further education colleges** have engaged with East Bank's education and opportunity programmes.

East Bank sees the UK's largest co-location of major public-facing institutions in recent times, all operating in similar fields with shared objectives and aspirations. The clustering of institutions at East Bank represents a rare opportunity

for the partners to collaborate directly on cultural and educational initiatives, facilitating the sharing of skills and knowledge to allow personnel to maximise their creative potential.

While the full impact of East Bank is yet to be realised, the institutions have already started to collaborate on research and programming at QEOP, with UCL and V&A East sharing resources and facilities as part of the V&A Late series.

In addition to collaboration between partners, East Bank's institutions have already created important links with local business ecosystems. London College of Fashion, UAL has already strengthened its longstanding connection with the east London fashion & textiles industry, sponsoring the Fashion District initiative, which supports the sector through the delivery of maker space and dedicated events, as well as investments in skills and innovation. Likewise, the college has partnered with Raeburn and others to deliver the Future of Fashion exhibition at Lab E20.

[4]

East Bank's partner institutions have already been working to establish a presence across the Growth Boroughs.

↓ Participants at The Great Get Together event at East Bank



East Bank Outreach Programmes

Since East Bank's inception, the partners have showed unwavering commitment to delivering positive outcomes for the Growth Boroughs. Prior to embarking on their outreach programmes, partner representatives met with local schools and community groups to map out a collaborative framework which set out to have a local impact which would be greater than the sum of their individual parts. The partner institution then rapidly mobilised and collaborated to devise on a transformative programme of outreach initiatives which have already delivered positive outcomes for local residents.

EAST Summer School Programme and Careers Programme

The EAST Summer School Programme has been operational since 2018 and offers more than 30 free and interactive courses to local secondary school and further education students each year⁴. The courses are delivered by East Bank partners and other partners, offering participants the opportunity to develop related skills in fashion, film, journalism and entrepreneurship, delivered by world-leading institutions.

The EAST Summer School Programme has been co-designed by the community, with local youth groups feeding into both the content and programming.

Since 2018, more than **1,400 local students** have attended courses with more than **91%** of attendees in 2022 rating their experience as “good”, “very good” or “excellent”⁴.

Building on the success of the East Summer School, East Careers week has been taking place on the Park and since 2021, engaging over 3,000 local pupils, with industry insights into careers on the Park. The East Ed Teacher development programme provides teachers with careers Continuing Professional Development (CPD) and curriculum enhancement workshops.

Since 2015, more than **100 young people** have been enrolled on 12-month traineeships under the STEP programme. In terms of pre-employment, more than **300 individuals** have received training as part of CCOP and more than 150 individuals as part of Freelance Exchange. Across the two pre-employment programmes, more than **150 participants have been offered jobs**.



↑ Participants at The EAST Summer School

[5]

QEOP has built strong foundations to transition to a fairer and more inclusive economy that drives continued prosperity across the surrounding Boroughs.

As the confidence and ambitions of LLDC, Growth Boroughs, Park partners and east Londoners themselves has grown, they have shifted away from the 'convergence' narrative of 'catching-up' with the rest of London. The combined assets of the Park and east London places QEOP at the centre of London's future growth for years to come – ensuring that growth is fairer and more inclusive is the key focus going forwards.

The co-location of world class cultural and educational institutions at QEOP serves one of the youngest and most diverse communities in the UK and can serve as a national blueprint for how to deliver growth that is long-term, sustainable, inclusive, and resilient.

A fairer and more inclusive economy at QEOP seeks to: “Ensure livelihood security for the population of the Growth Boroughs, recognising the role of QEOP and its institutions can play in delivering the fairest and greenest sub-region in London”⁸.

Moving forward, LLDC and its partner institutions are embarking on a joint endeavour that enhances fundamental societal rights for both young people and institutions. This reciprocal relationships ensures that young people have the right to access and enjoy a range of high-quality creative experiences at QEOP, from immersive education and skills opportunities preparing them for high-demand, high-paid jobs through to being co-producers and consumers of cultural content; whilst institutions located at QEOP have the right to access a pipeline of diverse talent, supply chains, student cohort and audiences and increasingly recognise the benefits of diverse, authentic and local talent in all areas of their businesses.

← Plexal at Here East

QEOP — Economic and Social Impact Report

QEOP must continue to be a testbed for innovation to test, adapt and scale solutions to wider societal issues

The assets, partners and tenants at QEOP should continue to use the Park as an asset to test and adapt innovations that can be scaled and delivered across the Growth Borough's existing neighbourhoods. Such innovations should seek to better collect and gather local data, embrace community ownership and local management of assets, promote a circular economy that benefits locals and deepens local engagement and participation.

“

The future opportunities at QEOP present life changing opportunities for the people of east London and are game changing for the institutions and organisations located at the Park.

— Michelle May,
Executive Director of
Inclusive Growth, LLDC



Prior + Partners and Future Places Studio

[Case Study]

Elevate

Established following the 2012 Games, Elevate is a leadership model designed for young people, by young people, using their lived experience to drive innovation, shape change and elevate futures. The objective of Elevate is to provide representation and empowerment of local young people through collaboration.

Elevate is structured across two sub-groups, the Elevate Board and the Elevate Youth Voice, which accommodates a cohort of **60 young people** from the Growth Boroughs. The Elevate Board was established

in 2019 and is made up of fifteen 18- to 24-year-olds who ensure the voices of young people are represented at a strategic level and influence and shape decisions at QEOP. The Elevate Youth Voice was established in 2008 and comprises forty-five 14- to 18-year-olds who provide their lived experience and local expertise to help shape plans for QEOP.

Since 2018, **500 young people** have been recruited from the Growth Boroughs to be part of the Elevate programme⁴. Each young person participates in an intensive leadership development programme which equips them with the skills required to become experts in ‘lived experience’ to enhance their capacity to shape plans at QEOP. Since 2020, every young person involved in a formal capacity has been paid London Living Wage for their time.

The role of Elevate has evolved and adapted over time

Established with the objective of engaging local young people in the future planning of QEOP, the group developed a post-Games manifesto outlining what young people wanted to achieve and successfully became the first youth group to submit a formal response to a planning application.

Since then, Elevate have fed into every major planning application at the Park as well as helping to shape LLDC's priority themes of inclusive growth, community and opportunity. As the legacy transformation at QEOP took place, the role of Elevate adapted from advisory group to acting as a social enterprise with its culture and goals, which operates its own programmes and funding schemes, conducts research and facilitates youth engagement networks. As of 2024, **over 3,000 young people** have been involved in Elevate’s programmes and initiatives⁴.

Elevate also maintains an active role in two of QEOP’s flagship skills and employment schemes: The Good Growth Hub and Build East. Their role has involved inputting into the design of physical spaces, future plans, branding, shaping governance structures and exploring ways to better involve the local community.

The Elevate Fund is helping young entrepreneurs from the Growth Boroughs to develop impactful projects

Supported by the Spirit of 2012 and in collaboration with the Foundation for Future London, has allocated £83,750 to 31 local young people and community organisations in the first round of the Elevate Fund across three award categories.

Future Me, Future Youth

Elevate has designed and facilitated the annual Future Me, Future Youth event which is attended by around 200 young people. The purpose of the event is to provide young people from east London with careers advice and support, through networking with industry experts and local organisations, panel discussions, and debates.

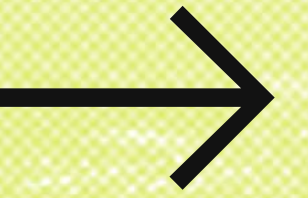
Youth Engagement Network

Established in 2018, the Youth Engagement Network is a platform for the Growth Borough youth service leads and local youth providers to come together to exchange information on programme level activity, tackle collective social issues together, share best practice and provide opportunities for collaboration, and to support in the co-design of practical solutions.



← Cohort members from Elevate

04 Reflections



As the Park enters its next phase, it provides essential lessons for future large scale regeneration programmes and how to best capture lasting economic and social value from sporting events.

Conditions for success

Through the research undertaken in this report, particularly the insights and learnings gathered from discussions with stakeholders, several themes have emerged that describe the drivers of success at QEOP and across the Legacy Area over the last 20-years. While there may have been several highly specific conditions or occurrences that shaped QEOP’s impact (not least its origins in the 2012 Games), a series of ‘conditions for success’ have been identified which have allowed QEOP to achieve its strategic objectives.

Looking forward, many of these ‘conditions for success’ should continue to be embraced by QEOP’s partners. They also serve as valuable learnings for other large-scale regeneration projects or future MDCs and are outlined as follows.

A clear economic and spatial vision

A clear, long-term vision is consistently recognised as the key driver of success at QEOP. It has provided, and continues to provide, clarity and certainty, transcending all aspects of LLDC and its operations. This vision ensures that even in the face of disruption, a common and shared ambition remains constant.

Consistent and talented leadership

A leadership team with a common purpose has been key to QEOP’s success. Equipped with the skills, resources, and powers needed, they are empowered to drive change. Many leaders have built their careers at the Park over decades, offering deep insights and learnings to shape current practices.

Cross-party political commitment

QEOP benefitted from securing political alignment to achieve the vision and strategic objectives. Multi-decade regeneration schemes such as this, which has gone through various political phases, requires cross-party buy-in to ensure the resources and powers are retained throughout the process and that any potential obstacles are removed efficiently.

Being adaptable and flexible

Long-term regeneration projects across political and economic cycles must adapt to external forces and market demands. Anchored in its vision, QEOP has learned from earlier phases and invested in evaluations and reviews to guide decisions today.

Planning for legacy and inclusivity from the outset

Access to training, employment opportunities, affordable housing and community facilities for existing communities has been embedded from the very outset of QEOP. Whilst there has been challenges to benefits realisation for all, targeted interventions and programmes to address structural inequalities have been hugely successful.

Comprehensive powers to deliver change

LLDC was equipped with comprehensive powers and authority to oversee plan-making, development management, land acquisitions, and estate management. Growth and urban regeneration on this scale are unlikely to be achieved at the pace seen without these powers in place.

Partnerships and collaboration

Shared ambition to deliver a lasting legacy by both the public sector and private sector organisations has been a catalyst for success at QEOP. Joint ventures and partnerships, notably East Bank as a key partner, fostered by a culture of collaboration, has delivered large-scale regeneration and a vibrant programme of outreach initiatives to maximise local participation.

Culture of innovation

Striving to overcome technical and social challenges, QEOP acts a testbed to trial and scale-up practical solutions to complex urban and human challenges. Embracing Mayoral and Government priorities of innovation across all aspects of QEOP has unlocked opportunities for local enterprises and entrepreneurs.

Tenacity and drive

Ambition and perseverance has been fundamental in LLDC successfully delivering the large-scale regeneration at QEOP. This ambitious approach has facilitated delivery both at speed and scale.

Reflections

This research has been undertaken during a period of transition for the LLDC. In December 2024, the LLDC's town planing powers and functions were returned to the four Growth Boroughs, which provided an opportunity to take stock and reflect. As this report sets out, what has been achieved since 2012 is remarkable. The scale and pace of delivery at QEOP; 13,000 new homes, 38,300 jobs, new public spaces, seven universities, and the attraction of global brands and institutions, are unmatched by any other regeneration programme in the UK, and by very few internationally. QEOP has become a new part of London, shifting its geography eastwards, and is visited by over 20 million people each year.

What has also emerged through this research, and is perhaps overlooked, is just how far the LLDC has come in driving forward the inclusive growth agenda. Over the past 13 years, LLDC has consistently challenged the status quo, from pioneering approaches to training and procurement, to mandating payment of the London Living Wage. These interventions have not only shaped the character of the Park and created meaningful impact for east Londoners, but have also raised the bar for major projects and programmes across London.

Drawing together the analysis, research, and discussions conducted over the past 12 months, the following key messages are highlighted:

Impacts have been significant, diverse and fast.

The impacts of QEOP have been both far-reaching and rapid. By traditional economic measures, they are hugely significant, but they extend far beyond conventional metrics. The Park has generated benefits across the economy, businesses, communities, culture, sport, and the environment, with influence stretching well beyond its boundaries. However, lessons have been learned along the way, and it is recognised that more work is needed to ensure the benefits are fully felt by all, both by the communities on the Park's fringes and by east Londoners more broadly.

Strong foundations now position the Park for future growth.

Although born from the unique circumstances of the 2012 Games, the Park's success today is rooted in strong partnerships, a diverse and innovative business ecosystem, deep local talent, high-quality homes and places, world-class institutions, and major infrastructure. Together, these strengths create a powerful platform for the next wave of impact, supporting livelihoods, advancing London's Growth Plan, and contributing to the UK Government's Investment 2035 Industrial Strategy.

This is only the beginning.

Regeneration is not static, and many impacts are still emerging. Learning from the drivers of success identified in this research shows that continued investment, whether in people, infrastructure, adaptation, or future-proofing, will be essential to maintain momentum and ensure benefits are meaningfully shared. This work provides a strong baseline for future work. We recommend that a bespoke measurement framework be established to meaningfully track impacts across all dimensions.

Beyond London, LLDC and QEOP provide deep learnings for other regeneration programmes. At a time of further devolution across the UK and a new wave of large-scale new communities and New Towns, many of which will be delivered through Development Corporations, Government and public and private sector partners must look to QEOP for insight and learning. No other project in the UK offers such recent, evidence-based understanding of what drives the delivery of regeneration, and how to leverage benefits for local communities. The journey has not been linear, and there have been challenges along the way; but anchored in its vision, LLDC has continually sought to learn and innovate.



Annex →

Methodology

Economic Impact

This study assesses the economic impact of the QEOP based on the range of activities undertaken within the Park by LLDC, the Park’s venues, as well as its partners, assets and tenants.

Dependent on the indicator and data available, it also considers impacts across various phases, including the transformation, existing operation and future potential.

The core indicators within the economic impact assessment are as follows:

- Employment measured by full time equivalents
- Gross Value Added (GVA) per year

Across these activities, direct, indirect and induced impacts have been estimated. These impacts are described below.

Direct economic impacts

Impacts occurring within the boundaries of QEOP.

Indirect and induced economic impacts

The impact assessment includes not only the direct economic impact resulting from activities at QEOP, but also the economic activity stimulated through its supply chains (i.e. the indirect impacts) and additional activity supported by employment incomes and consumer spending (i.e. the induced impacts).

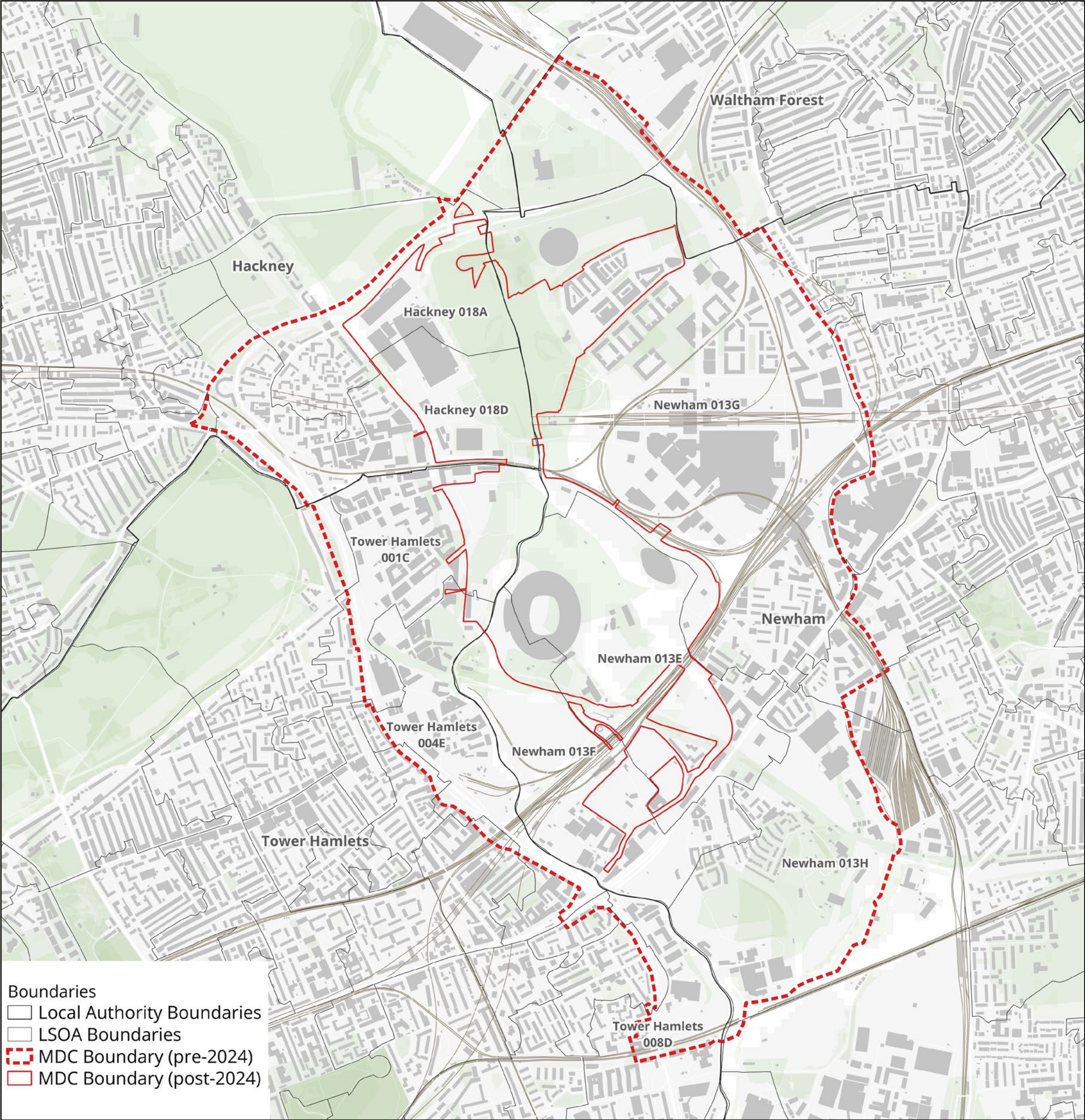
All monetary values quantified within this impact assessment are presented in 2024 prices.

Additionality

The economic footprint analysis presents a snapshot of QEOP’s impact at a point in time. The analysis does not therefore seek to make adjustments or allowances for the additionality of impact, other than to attribute impacts to the geography within which they are expected to take place.

Study area

Where publicly available datasets have been used in this assessment, the Lower-Layer Super Output Areas (LSOAs) presented in the map to the right have been used to define the study area. These LSOAs are the ‘best fit’ with the LLDC planning authority boundary (up until December 2024).



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