Economic and Social Impact Report

Queen Elizabeth Olympic Park

Executive Summary

2025

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

Background

Established as the first ever Mayoral Development Corporation (MDC) in 2012, the London Legacy Development Corporation (LLDC) was created with the mission:

"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".

Over the past 13-years, Queen Elizabeth Olympic Park (QEOP) has transformed a once-neglected brownfield site into the largest new urban park created in the UK in over a century. Alongside expansive parkland and public realm, it hosts repurposed world-class sporting venues, seven universities and educational institutions, one of the UK's leading innovation district, and thriving new residential communities, home to more than 38,400 people.

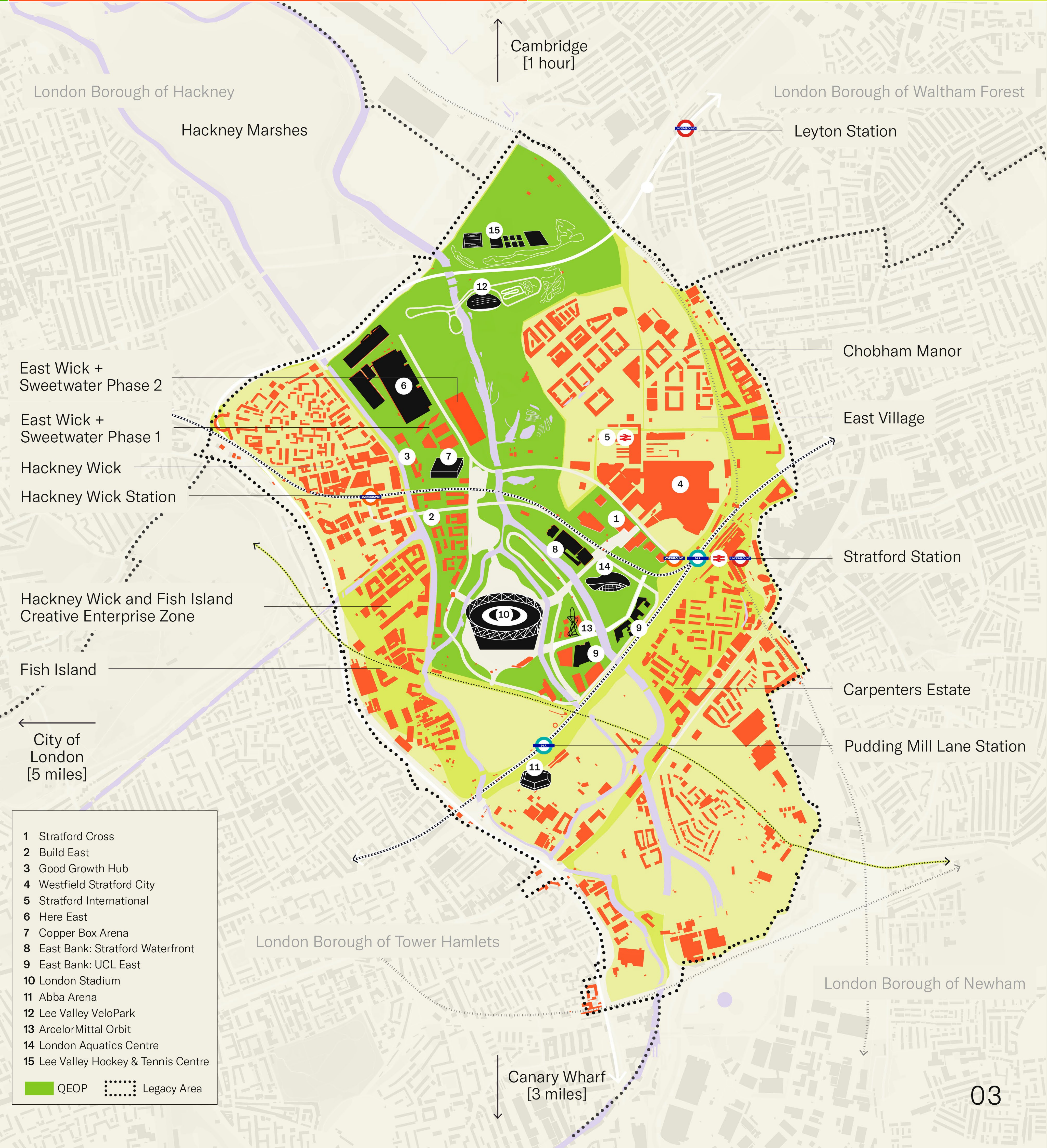
To mark the start of a new phase for LLDC, focused on using the Park's assets to drive economic growth and secure livelihoods, LLDC commissioned Prior + Partners, with Future Places Studio, to undertake an independent assessment of the Park's economic and social impacts. **This Executive Summary presents the key findings; the full report is available separately.**

The study evaluates QEOP's economic and social impacts delivered since the London 2012 Games and intentionally takes a forward-looking view of growth achievable by 2035, recognising that regeneration and its impacts are still underway.

The report also examines the conditions that have enabled these impacts and those that will support their continued realisation.

Impacts are assessed across different geographies.

- **'QEOP'**, or 'the Park': defined as the core parkland area, including the Park's venues, Lee Valley Regional Park Authority venues and assets operated by LLDC.
- **'Legacy Area'**: 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).
- **'Growth Boroughs'** The four London boroughs that QEOP sits across — London Boroughs of Newham, Tower Hamlets, Hackney and Waltham Forest.



QEOP Today

£3.5bn

Annual GVA generated within the Legacy Area, supporting £1.8bn GVA in the Growth Boroughs.

38,300

jobs within the Legacy Area, supporting a further **+17,700** jobs across the Growth boroughs.

£1.8bn

in annual gross earnings from jobs in the Legacy Area, generating **£776 million** in fiscal benefits through income tax and national insurance contributions.

226ha

of green space and over **15,000** trees planted.

71%

of park users are local residents.

128m

Stratford Station is the 5th busiest station in the UK, handling over 128 m passengers annually.

20m

visits a year, adding **£230m** in visitor spending to the local economy every year.

38,400

Home to 38,400 people and **+13,000** new homes built since 2012.

140%

growth in creative jobs since 2015, outpacing growth across London.

300%

rise in knowledge-intensive jobs since 2015.

14,000

students across 7 universities

16,000

construction created jobs since 2012.

3,200

people have received industry relevant construction training, including 420 apprenticeships.

Future Focus

By the year 2035...

13,300

additional jobs within the Legacy Area by 2035, a total of 51,500 jobs.

£1.2bn

billion in annual gross earnings of Growth Borough residents who have a job within the Legacy Area by 2035.

£5.5bn

GVA generated annually in the Legacy Area by 2035.

10,800

new homes delivered across the Legacy area by 2035.

3,400

new affordable homes delivered across the Legacy Area by 2035.

10,500

students to be based at East Bank.

1.5m

expected annual visitors to East Bank.

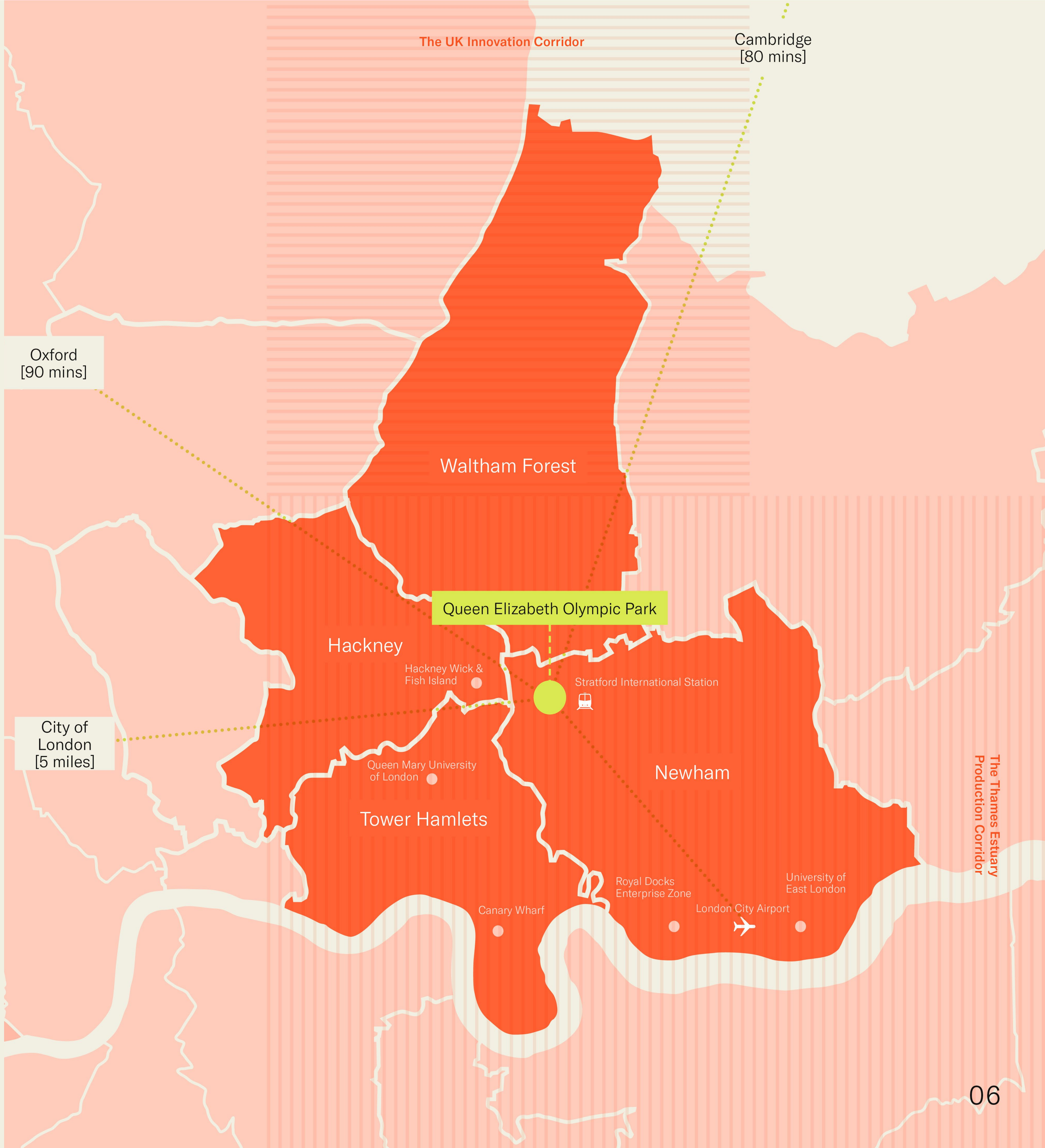
50,000sqm

of consented employment floorspace to be delivered.

The heart of London's most diverse subregion

Located in east London, four miles from the City and in the Lower Lee Valley, the Legacy Area spans 226 hectares, equivalent to approximately 552 football pitches or the size of Soho. The Park sits at the centre of the fast-growing economic subregion of east London, home to 1.25m people, covering the four Growth Boroughs of Newham, Hackney, Tower Hamlets and Waltham Forest. The Legacy Area has grown rapidly in recent years, with GVA growth x 2.8 faster than the London average. These boroughs include some of the youngest and most diverse populations in the UK; yet despite this diversity and recent growth, many residents continue to face some of the most significant socio-economic challenges nationally.

As this research sets out, the impacts achieved at QEOP extend far beyond the boundaries of the Park. The Park has acted as a major catalyst for regeneration across east London and has played a significant role in shifting London's economic geography eastwards. However, this has not happened in isolation. Strong collaboration and sustained partnership working between LLDC, the Growth Boroughs, businesses and communities have collectively enabled and accelerated place-based growth to deliver the impacts outlined in this report.



The story so far

The Economic and Social Impact Report has examined the impact of activities at QEOP from 2012 to the present. The study also assessed the scale of future growth yet to be realised up until 2035.

The study draws on best-practice economic and social impact evaluation techniques, using a mix of primary and secondary research and both quantitative and qualitative analysis to quantify impacts wherever possible while assessing the factors and conditions that drove them. Extensive engagement with LLDC colleagues (past and present,) park partners, the Growth Boroughs and the development community was undertaken through a series of interviews and working groups. The full methodology and data assumptions can be viewed in the main report.

A detailed review of LLDC's strategic objectives and vision, combined with the research and engagement activities, identified six key impact themes that form the core of the report.

The themes cover:

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

To read the full Economic and Social Impact Report, please scan the QR code.

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Economic impact and inclusive growth

QEOP has become an area of regional and national economic significance. Economic activity within the Legacy Area now supports **38,300 direct full-time equivalent (FTE) jobs** across its venues, commercial and cultural assets, educational institutions, and innovation district, generating £3.5 billion in annual GVA. The economic impact extends widely, creating a further 17,700 jobs in the Growth Boroughs and 26,500 jobs elsewhere; generating an additional £4.5 billion in GVA annually. In total, the Legacy Area supports around **82,500 FTE jobs nationwide, contributing £7.9 bn to the UK economy** each year.

Since 2012, growth has been outpacing the surrounding boroughs and London; employment within the Legacy Area has grown **x5.4 times faster than the London average**, and **x9.0 faster than England**. This growth has been powered by a diverse mix of sectors, from the creative industries in Hackney Wick and Fish Island and now Eastbank, and the public sector and multi-national organisations at Stratford Cross, to innovative businesses in future-facing industries at Here East, including Plexal, home to over 800 innovators.

This rapid growth has created new employment and training opportunities for local residents, with around **one in two jobs at QEOP filled by residents of the Growth Boroughs.** The major construction programme since 2012 has also had a significant impact: alongside creating over 16,000 jobs, **LLDC has been highly successful in using its powers to improve working practices and challenge the status quo** through progressive procurement and training initiatives.

However, while performance at QEOP is strong across traditional socio-economic metrics, and improvements are evident across east London, much of this progress is driven by 'imported prosperity' and new residents moving into the area. Longitudinal research led by University College London into structural inequalities suggests that many benefits of regeneration have not yet reached communities surrounding the Park. In response, LLDC has introduced targeted, co-designed programmes such as the Good Growth Hub, that deliver a demand-led service model, **an approach largely unprecedented in mainstream regeneration**, to address deep-rooted challenges and improve east Londoners' access to training and employment.

Successful and connected communities

QEOP stands as a global model of vision-led regeneration. It has showcased how public and private collaboration can drive significant market change and deliver rapid, high-quality urban transformation despite a hugely complex and fragmented environment. This research demonstrates that the enduring clarity of vision, shared across LLDC and its partners, underpinned by a clear economic rationale, strong land control, and genuine collaboration between the public and private sectors, has been critical to realising positive built development outcomes.

Since 2012, over 13,000 homes have been delivered (and an additional 12,900 in the pipeline) across diverse tenures (75% of consented homes in LLDC led projects are family homes), creating mixed and distinctive neighbourhoods. Despite common misconceptions, the majority of housing has been delivered by the private sector; but with the public sector creating the right conditions, notably through the delivery of connectivity and the early delivery of social infrastructure — including eight schools, a health centre, the Chobham Manor community centre, and nearly six hectares of local open space. **Early social infrastructure has been essential for attracting investment and fostering a sense of community.**

The Park's management and development follow Great Estate principles. LLDC has retained landholdings and takes full responsibility for site management to **safeguard its vision and ensure that long-term value is prioritised over short-term gains**. Deliberate investment in design excellence has created high-quality places not only to live, but also to invest.

In recent years, LLDC has faced criticism over its delivery of affordable housing. Since 2012, 3,587 affordable homes have been delivered in the Legacy Area, including 1,772 at social rent or London Affordable Rent levels. The issue is complex, partly reflecting schemes approved under different political, policy, and economic contexts, as well as wider structural challenges. Affordable housing delivery illustrates the careful balancing act and trade-offs required in large-scale regeneration, navigating local, regional, and national priorities while adapting to shifting economic and political conditions. **Looking ahead, 50% affordable housing is targeted across LLDC-owned sites,** including Stratford Waterfront, Pudding Mill, and Rick Roberts Way.

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> 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

An asset for the community

Carrying forward the legacy of the 2012 Games, QEOP has evolved into a thriving centre for sport, culture, and community in east London. One of the Park's most powerful contributions has been enabling **sporting participation at the grassroots and 'everyday level', not just for elite athletes**. Its world-class venues have been reimagined for everyday use alongside professionals.

The **venues are now used by over 4.7 million local residents per year**, supported by inclusive programming, pricing structures, and partnerships with local organisations that encourage participation by women, young people, and under-represented groups. The adaptability of sporting venues has been a key ingredient to their success.

Findings from the last six years illustrate that day-to-day the Park is used as an asset for local people and **71% of all users are from local communities.**

Accessibility to the Park and its venues can be said to have played a significant role in supporting health and wellbeing outcomes. Census data shows that residents at QEOP are healthier than the London average; however, the Park still has a role in supporting health across the Growth Boroughs, where many areas continue to face acute health inequalities.

The Park is a valued public space with a strong commitment to inclusion. Yet despite major improvements, some areas still do not fully serve all groups. Earlier research showed that ethnic minority residents mainly used the amenity-rich southern areas, while the more natural northern areas were less frequented. A decade later, follow-up studies show a far more diverse audience, supported by inclusive programming, co-design, and better links to surrounding neighbourhoods. Research on women's and girls' safety has informed targeted interventions, creating a more welcoming environment for all.

Innovation and the business environment

QEOP has become home to an ecosystem of assets, infrastructure and partnerships which support a 7-day-a-week-economy. The Legacy Area hosts nearly 1,900 businesses across diverse sectors, with the number of enterprises growing 45% since 2016, markedly faster than the London average. Around 420,000 sqm of new commercial floorspace has been delivered, with a further 150,000 sqm consented, supporting organisations of all sizes, from major employers to start-ups and micro-businesses alike.

The Park has become **a magnet for knowledge-intensive, creative, and future-facing industries**, including digital technology, professional services, creative enterprises, and immersive arts. **One in three jobs are currently in knowledge intensive industries**. A number of industry specialisms have been identified on the Park including a high concentration of cultural enterprises, 1.5 x more specialised than the London average; linking directly to the Hackney Wick and Fish Island Creative Enterprise Zone.

The Park has also **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. The ecosystem is spearheaded Here East and Plexal, the UK's largest innovation campus, which incubates start-ups, hosting SMEs, and delivers £700+ million GVA annually.

The Park also is equally a rapidly expanding education hub, home to seven universities and more than 14,000 students. Offering over 300 courses in fields from AI and robotics to fashion and performing arts, these **institutions are seizing new opportunities in East London** while cultivating a sense of place and community, and working in collaboration together to meet future skills need.

Through this **powerful combination of infrastructure, human capital, and institutions**, and knowledge intensive sectors, QEOP has become one of the UK's most important centres for innovation and growth.

Visitor destination, culture and sports

As one of London's most versatile destinations for sport, culture, and innovation, QEOP delivers a year-round programme that attracts some 20 million visitors and generates over **£230 million in on-site spending each year.**

Olympic-standard venues continue to host professional, elite, and international competitions across more than 25 sports, alongside an expanding cultural and entertainment offer. Together, they have hosted over 1,000 major concerts and entertainment events, including ABBA Voyage, MLB London, and the IAAF World Athletics Championships. Major events have been **invaluable for boosting public perception of the Park and of London as a visitor destination**, while also contributing to the Mayor's ambition for the city to become the global capital for sporting events.

The London Stadium, home to West Ham United FC and host to more than 50 athletics, baseball, motorsport and rugby events, has welcomed over 11.5 million attendees since 2012. Despite operational and financial challenges, the GLA now has ultimate funding responsibility for Stadium going forward which strengthens London's ability to stage major sporting and live music events, including future Olympic Games.

All venues are highly adaptable, supporting a diverse range of events. However, **looking ahead, there remains an ongoing need to refresh the Park's offer,** sustain visitor numbers and explore new opportunities to maintain spending.

Environment and sustainability

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 has been transformed into a diverse landscape of wetlands, meadows, and public spaces that integrates green infrastructure, biodiversity, and flood management, connected into the wider green corridor of the Upper Lee Valley stretching to the Thames River.

More than 20% of the Park comprises mature habitats supporting 28 priority species, with 15,000 trees and 300,000 wetland plants enhancing carbon capture and climate resilience. **The Park has earned eleven consecutive Green Flag Awards** — an accreditation that rewards well managed parks and spaces, recognising the ecological and recreational value it provides. The Park, as an innovation district, also serves as a testbed for new ideas, and one of its core focus areas is the climate emergency and accelerating sustainable innovation.

Designed as an urban park from the outset, QEOP represents **a new model for how people and nature can coexist within an urban environment.** Green spaces are well integrated into surrounding residential communities, providing opportunities for recreation, leisure, play, and active travel. Volunteers — known as 'Park Champions' — have contributed 110,000 volunteer hours since 2015, equivalent to 12.5 years of engagement, strengthening community ownership. Collaboration with conservation NGOs and universities informs ongoing management.

Mitigation and resilience to climate change are embedded across all aspects of QEOP's development. Delivered as the 'greenest Games' in history, the Park set industry-leading sustainability standards. However, in recent years it has faced higher temperatures and increased flash-flooding. In response, **LLDC has consciously shifted from simply 'being the greenest' to a science-based, target-led approach** monitored through its Climate Action Strategy, ensuring the Park can respond to evolving climate challenges.

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> With numerous state-of-the-art innovations in areas from water management, ecological restoration and material specification, the park anticipated many areas of best practice we see today.
>
> — Jason Prior, Masterplanner of the 2012 Olympic Park and Legacy Plan

Conditions for success

Through the extensive research and engagement, several themes and lessons emerged that describe the drivers of success since 2012 and before. While there have been highly specific factors at play, most notably the legacy of the 2012 Games, a set of 'conditions for success' have been identified that have helped drive impact to date and now act as a strong foundation for LLDC moving forward. These conditions also offer valuable lessons for other large-scale regeneration projects.

A clear economic and spatial vision

The shared long-term vision has remained constant and provided clarity and certainty even in the face of disruption

Consistent and talented leadership

A leadership team equipped with the skills, resources needed to drive change.

Cross-party political commitment

Cross-party buy-in ensured the resources and powers were retained to achieve the vision and strategic objectives.

Being adaptable and flexible

Learned from earlier phases and invested in evaluations and reviews to guide decisions today.

Planning for legacy and inclusivity from the outset

Training, employment, affordable housing, and community facilities for existing communities has been embedded from the very outset.

Comprehensive powers to deliver change

Equipped with powers and authority to achieve change at pace.

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.

Culture of innovation

Acts a testbed to trial and scale-up practical solutions to complex urban and human challenges, unlocking opportunities for local entrepreneurs.

Tenacity and drive

Ambition and perseverance have been fundamental in delivery both at speed and scale.

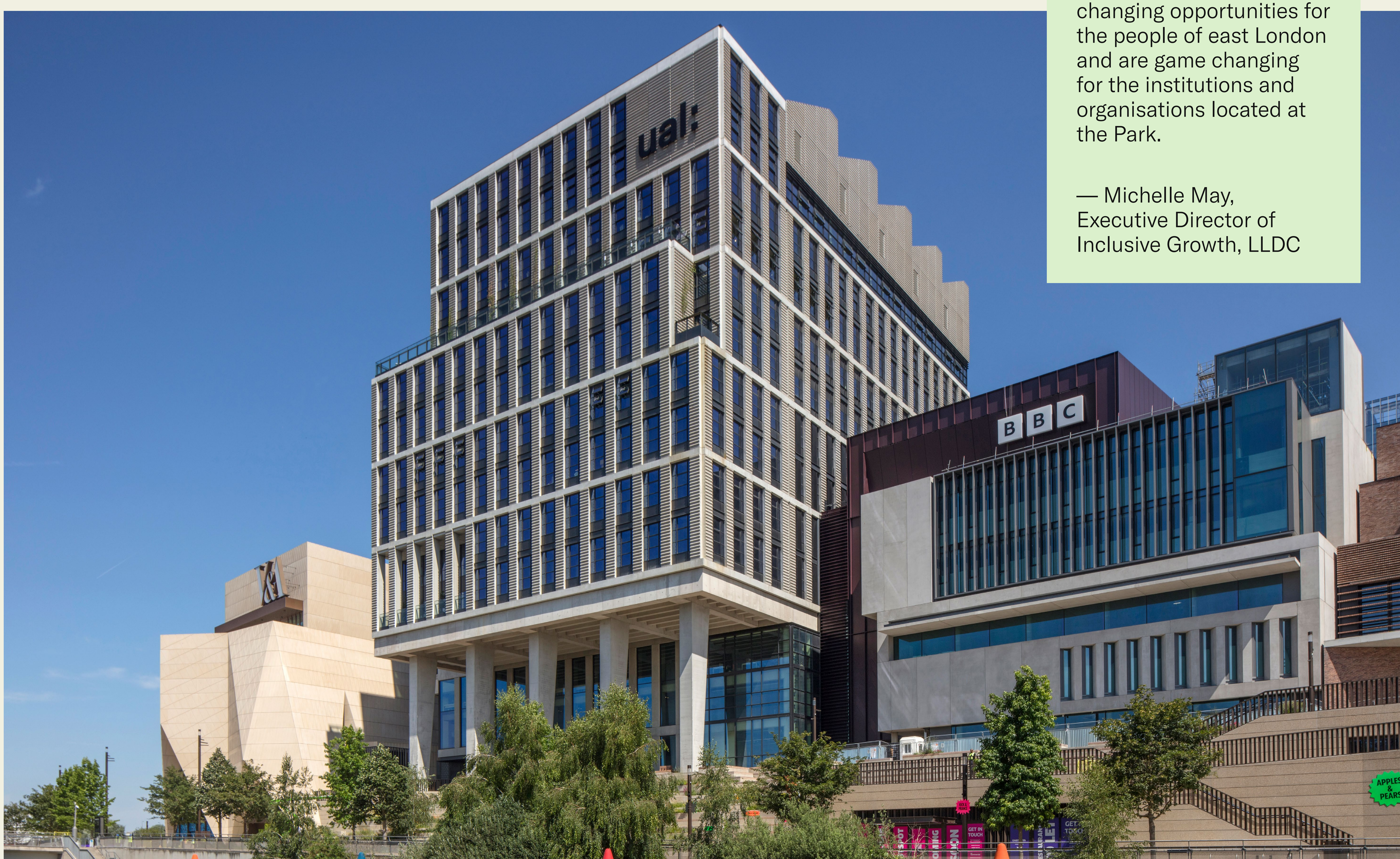
Looking forward

The Economic and Social Impact report has clearly articulated the diverse range of impacts being driven through the park reflective of its ecosystem of world-class assets, workspaces and programmes, vibrant culture, and exceptional quality of place. QEOP has already been growing at rapid rates, with GVA on the park having grown 2.8x faster than the London average since 2012 and has strong foundations for future economic impact.

The next chapter at QEOP is about activating and optimising the assets from the physical places and spaces to the international brand, partnerships, innovation, and deep reservoirs of social capital to create opportunity and shared prosperity.

The full occupation and activation of East Bank, the UK's largest arts and culture investment in a generation, presents significant opportunities and is expected to stimulate creativity and enhance the Park's night-time economy.

The Park has the right mix of assets to create the conditions for continued economic growth, providing a platform to help deliver local, regional and national ambitions. Leveraging these qualities will be key to continued investment and increasing productivity.



> 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

A platform for continued growth has been created

Diverse economic sectors	Concentration of future-facing and innovation-focussed sectors with strengths in creative and cultural industries, health and digital technology, professional services, education, and advanced manufacturing.
Skills and talent	Targeted skills initiatives such as Elevate and the Good Growth Hub, together a cluster of world-leading universities provide an outstanding talent pipeline to sustain high-value, knowledge intensive employment.
Housing	Diverse supply of high-quality, secure and genuinely affordable housing in distinctive neighbourhoods underpin population growth and support development of mixed communities.
Infrastructure and Connectivity	Excellent connectivity through Stratford Station and active travel links creating an attractive location for businesses and investment.

Leading assets and institutions	Including seven universities, world-class cultural and creative institutions and sports assets, an innovation campus, and workspaces.
Distinctiveness and placemaking	Best-in-class design quality and inclusive urban environment and parkland, together with unique mix assets and enduring legacy of the 2012 Games, cultivating a strong sense of place and identity.
Quality of life	A vibrant local culture, lively and activated social and community spaces with a year-round programme of events, creating an excellent quality of life.
Relationships and collaboration	Curated collaboration across sector clusters, academics, funders, industry leaders and communities needed to achieve inclusive growth.

The size of the opportunity

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.

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.

[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 sup-ply-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

Transitioning to a fairer and more inclusive economy

This Economic and Social Impact report has shown that the Park's impact locally, regionally, and nationally has been extensive, and that many further benefits are still to come. However, we also know that many east Londoners and neighbourhoods on the Park's fringes continue to face some of the most acute socio-economic challenges in the country.

A key finding of this research is that it points to an increasing sense of confidence and ambition across the LLDC, the Growth Boroughs, the Park partners, and east Londoners themselves. The earlier "convergence" narrative of catching up with the rest of London has evolved. There is now a stronger focus on reaching deeper into local communities to ensure that the benefits of growth are shared more equitably and what has been achieved so far has laid solid foundations for a fairer and more inclusive economy.

If we consider the regeneration of the Park in three phases, Phase 1 established the vision and prepared for and hosted the Games; Phase 2 is now drawing to a close - has focused on transforming the Park as it shifted from "hosting" to "legacy"; and Phase 3 will centre on experience, activation, and collaboration, completing existing developments and focused on driving inclusive growth.

As the London Growth Plan notes, "*The London economy cannot achieve its full growth potential until all Londoners are achieving their potential.*" Chronic skills mismatches mean that London's economy is being held back.

The Park already ahead of many places in London and nationally, with socio-economic programmes that go beyond conventional regeneration efforts, initiatives focused on creating good jobs, building skills, and shaped by local partners and organisations. The ambition for LLDC and its Park partners in this next phase is to scale these programmes so that more people can access them and more aspirations can be supported and realised. This sits alongside a commitment to building a healthier, fairer east London, and to continuing investment in the Park as a thriving habitat and a place to flourish.

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.

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