



2006

- Win Win Win for tourism
 - “Before, during and after the games”
- One Million extra visitors
- Four Billion television viewers
- Legacy of increased tourism for years afterwards

One Million extra visitors

- Relaxing curfew on night flights
- Tent cities to be constructed in public parks
- Homestay programme
 - 10,000 beds in Waltham Forest alone
- “Spill over” effect saturating hotel demand throughout Southern England and near Europe



One Million extra visitors

Table 2: Estimates of extra Olympic visitors, visitor and room nights

Scenario	Extra visitors (foreign and domestic, excluding displacement)	Extra visitor nights (000's, including displacement)	Extra room nights (000's including displacement)
High scenario (Oxford Economics)	908,440	4,900	3,400
Mid scenario (Athens)	660,000	2,400	1,800
Low scenario (Barcelona)	450,000	1,700	1,200

Source: High: Oxford Economics 'The value of the London 2012 Olympic and Paralympic Games to UK tourism, September 2007'; Mid: Athens actual and PwC analysis; Low: Barcelona actual and PwC analysis

Source: PwC, UK hotels forecast 2011 and 2012: How big a party for hotels in 2012? March 2011, p8.

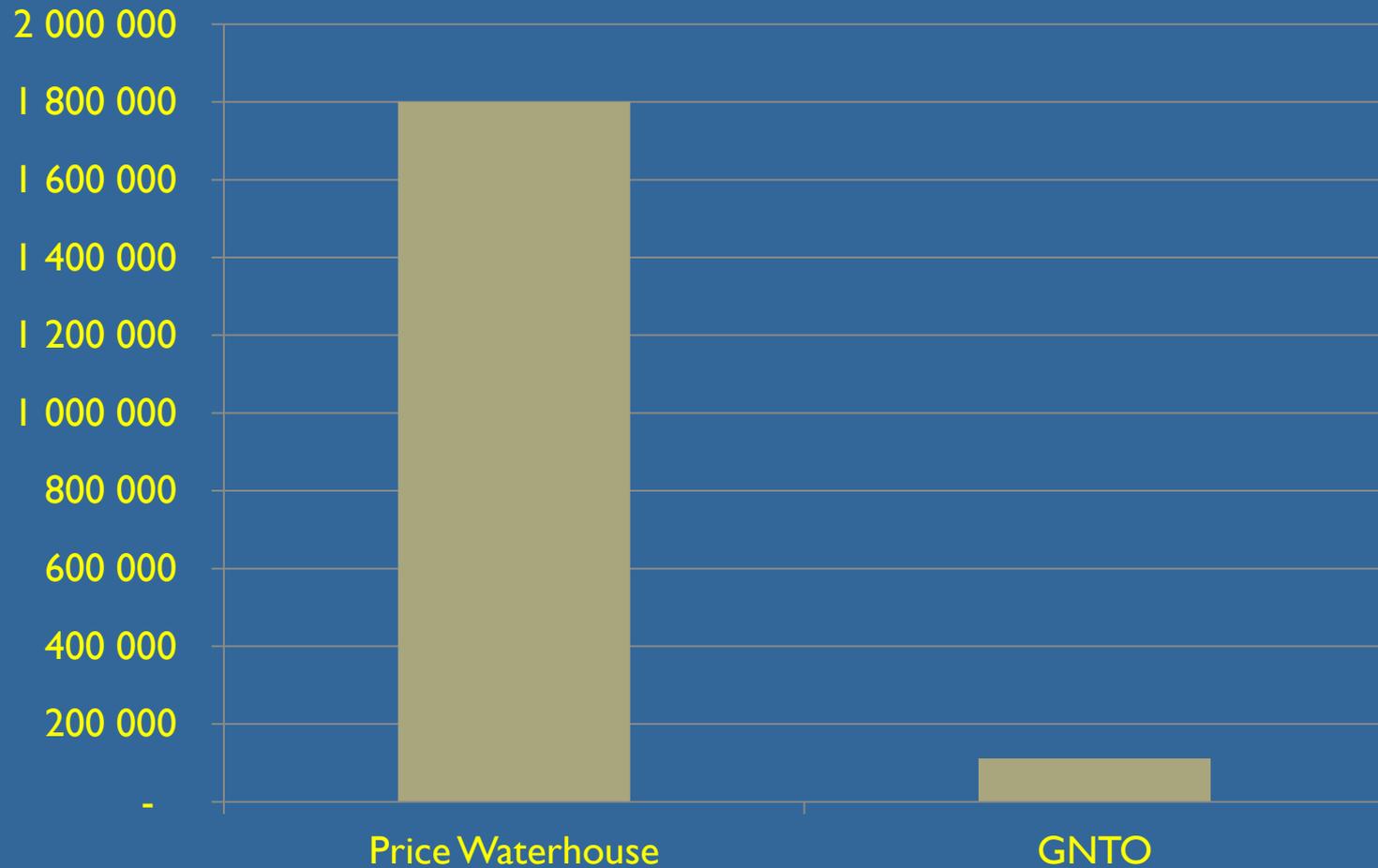


Athens GNT0 Count

August 2004	506,211 bed nights
August 2005	394,522 bed nights
Olympic effect	111,689 bed nights



Extra Room Nights





July 2012

“One million extra visitors daily”

“Don’t get caught out”



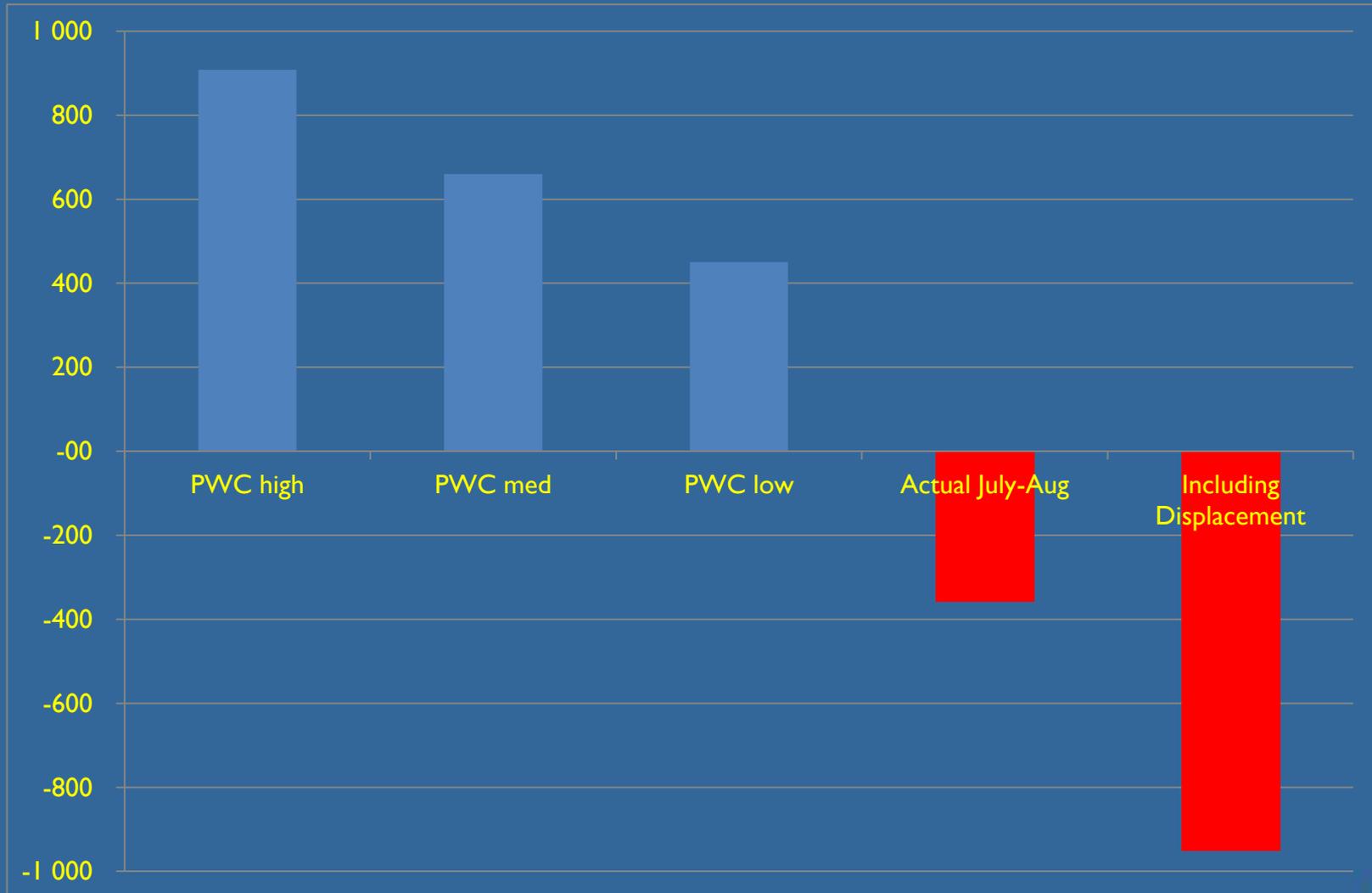
200 workers, £1.2m in your Olympic clean up

Thursday, 5th July 2012

With less than a month to go until the Olympic Games start, Westminster City Council has announced details of its million pound clean up team, assembled to keep London clean during the Games.

More than 200 extra staff will be drafted in during and in the run-up to the Olympics to keep Westminster clean with an anticipated three million extra visitors a day passing through the capital during the games.

“Extra” Visitors



Sources: PWC IPS



2012 Impact

v
2011

Hotels:	Occupancy up 4.8% Revenue up 94%
Shops:	August footfall 0.8% up (but compared with riots in 2011)
Attractions:	Averaged 40% down, worst 60% down
Sightseeing:	Approximately 40% down
Theatres:	Opening week 40% down Week 1 30% down Week 2 “improvement, but still down”

Sources: STR, New West End, ALVA, ETOA, Society of London Theatres.



Television Audience

“The Athens Olympics broke global TV viewing records, with nearly 4 billion people tuning in.”

The figures (were) described by Jacques Rogge as “staggering,”

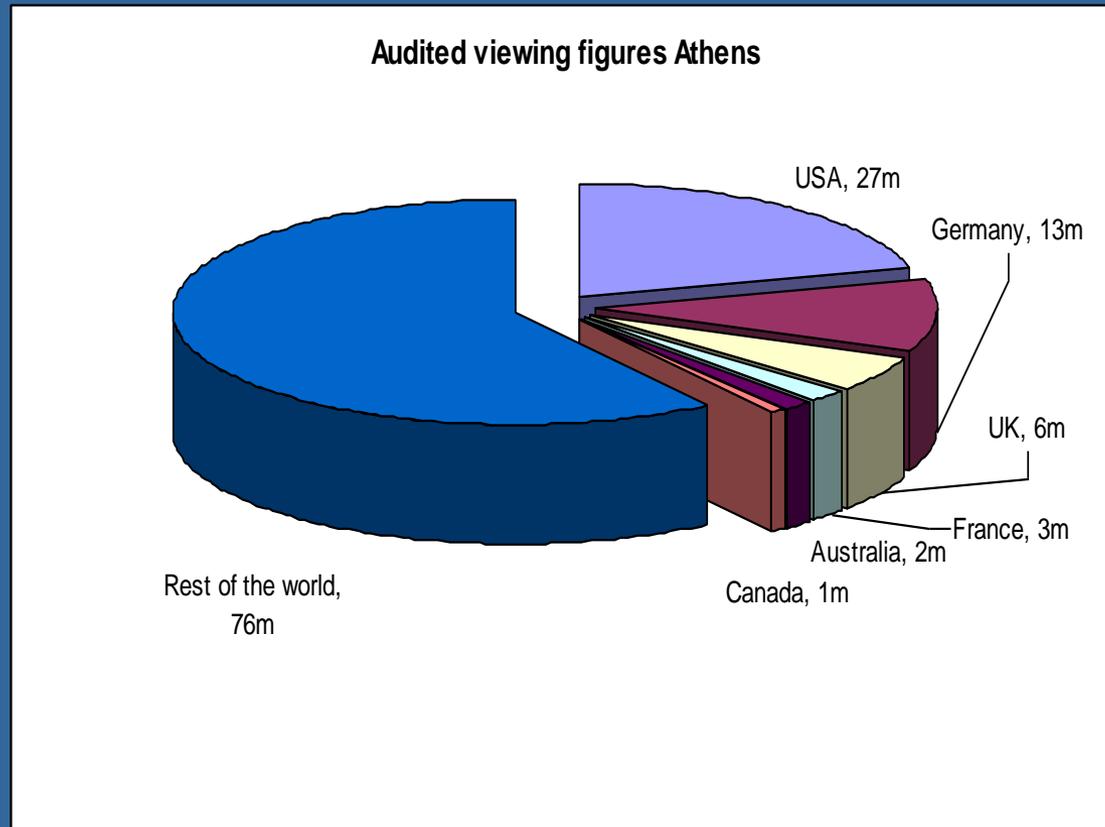
Global population 2004 6.5 billion

1.6 billion had no electricity.

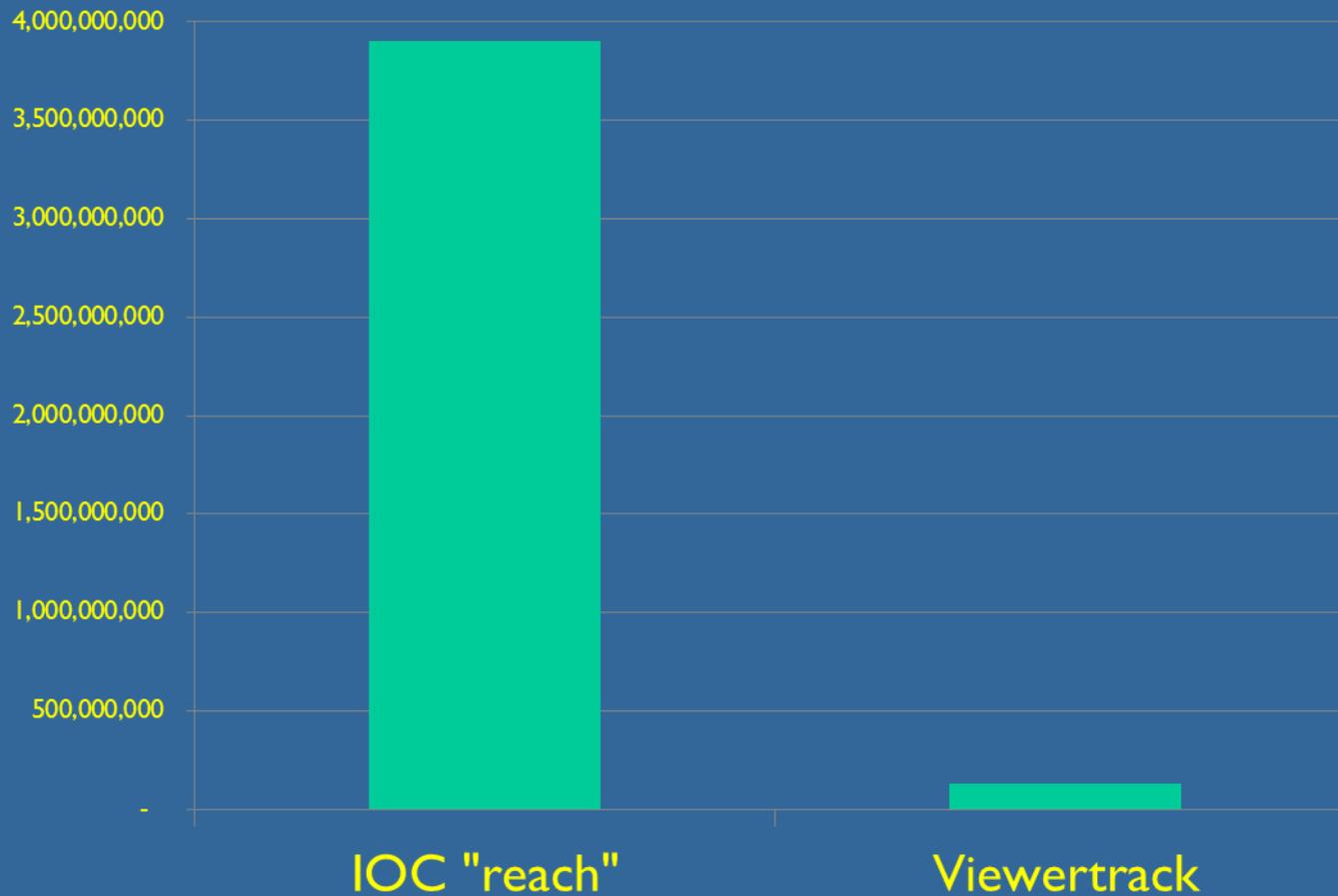
– 300 million were under five years old.



Audited Figure 127 million



Television Audience - Athens



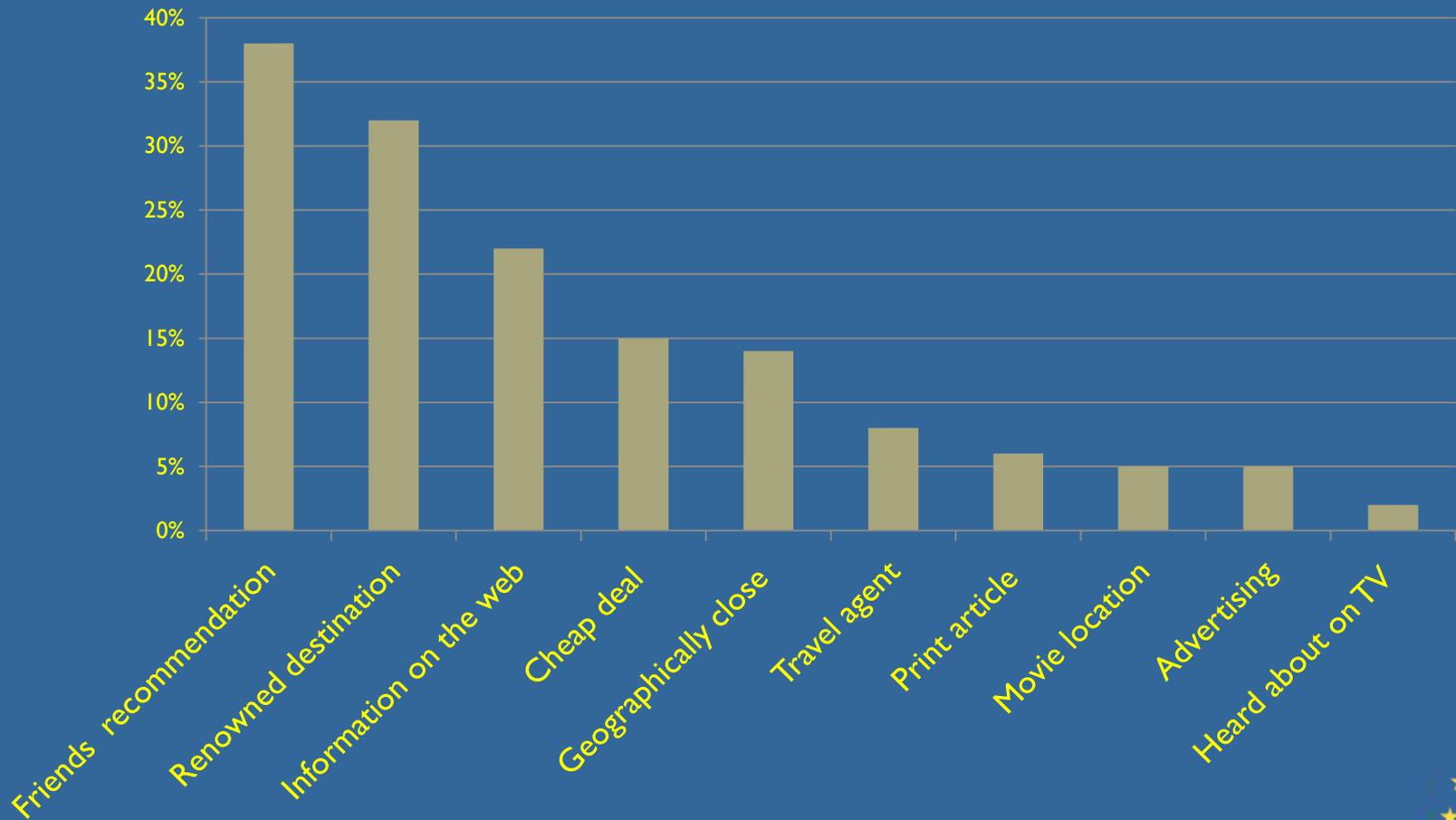
Legacy - Sydney

“We still know that in excess of 3.5 billion people around the world saw the opening ceremony and saw just how creative, innovative and the great things that we can do down here.”

- John Morse, Australian
Tourism Commission 2000



What mostly prompted your decision to choose this destination?

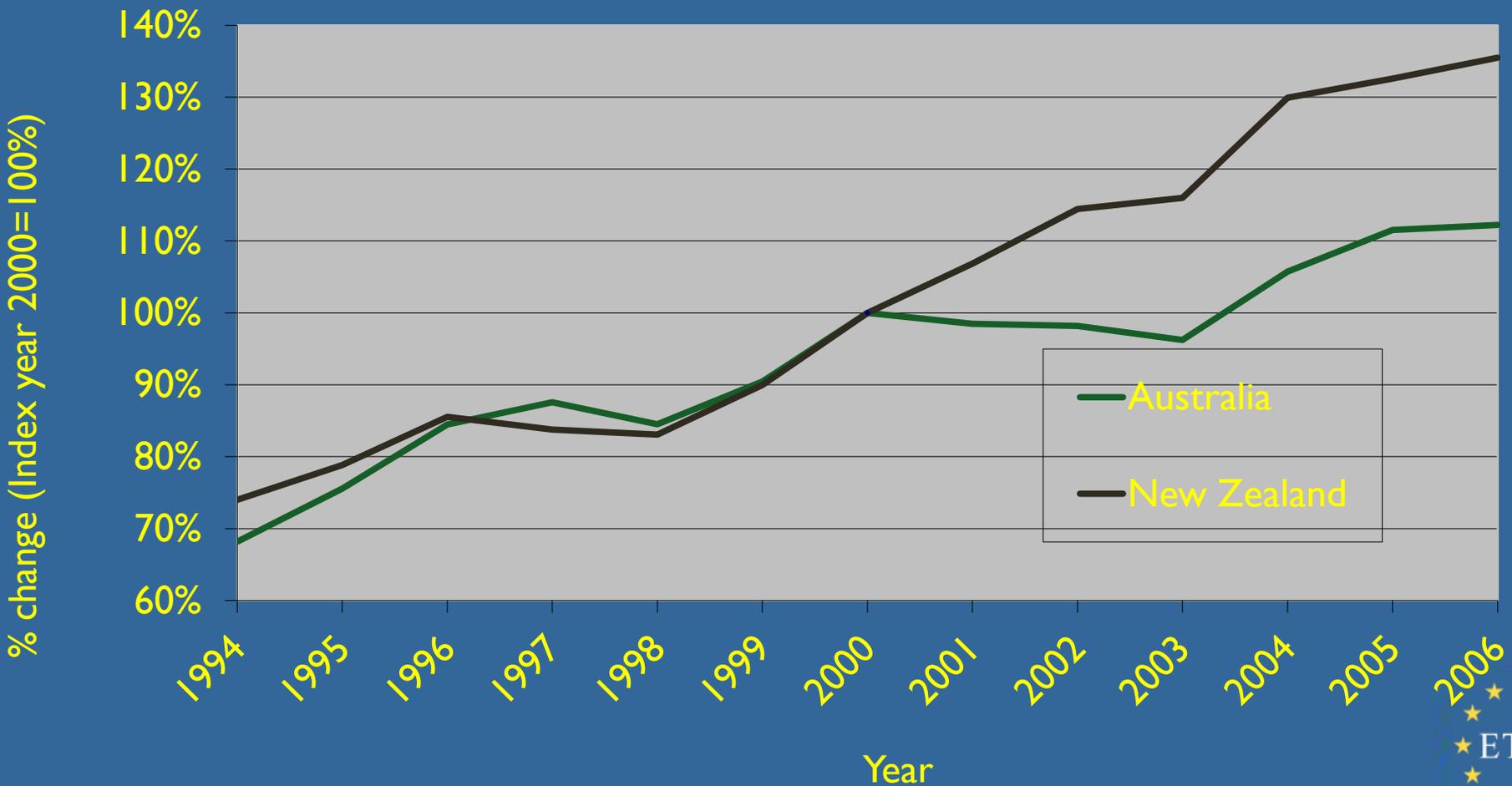


Source: TRAVELSAT, quoted in ETC, *New Media Trend Watch*



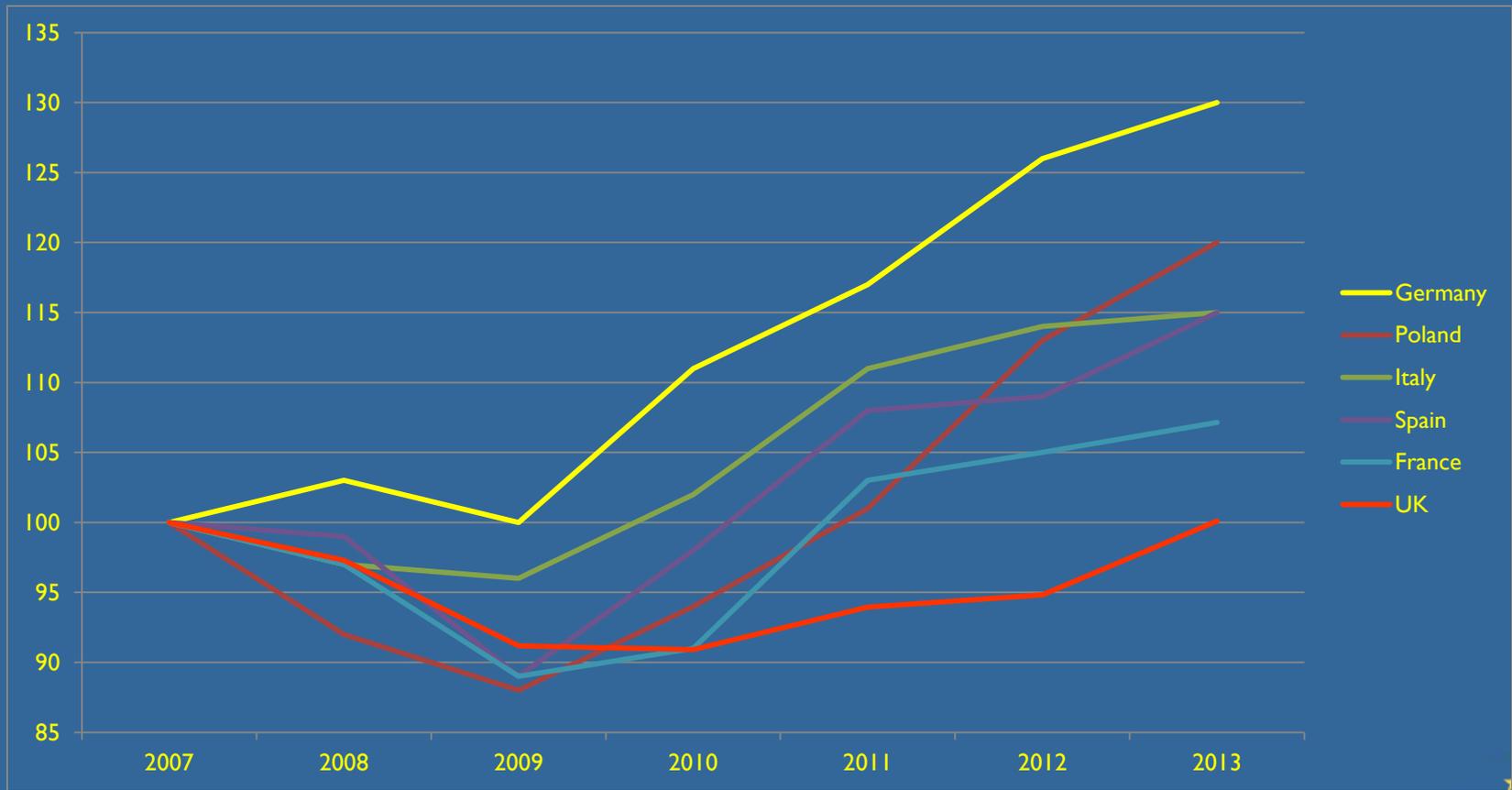
Legacy Sydney

International visitor arrivals to Australia and New Zealand



Legacy UK

Growth in International Arrivals



Source: ETC



PARTY!

- Inherently irrational
- Frenzied frivolity
 - Poor environment for coherent analysis
- Criticism
 - Miserable
 - Unpatriotic

Mega Events Don't Fit

Abnormal

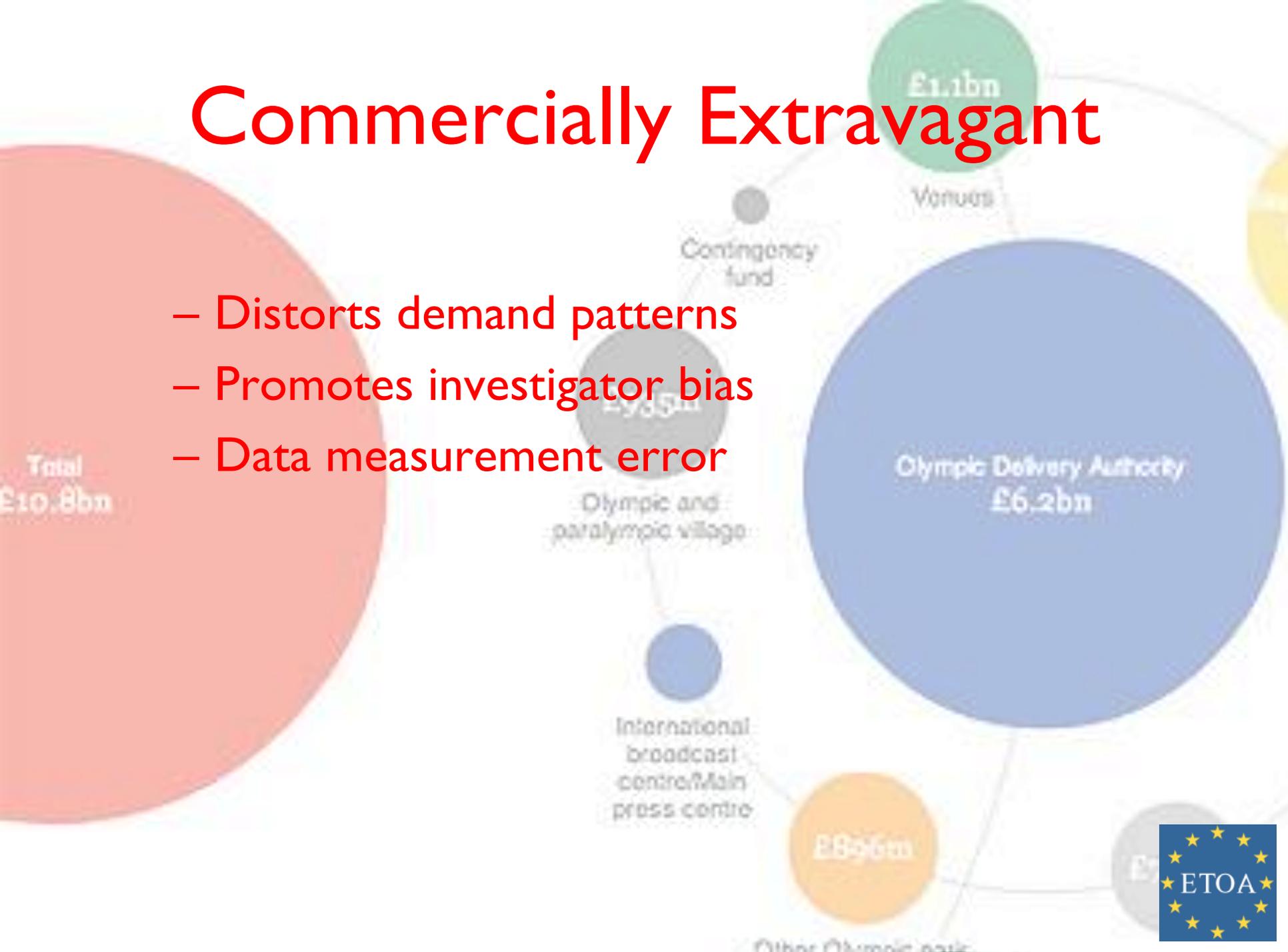
- Suspend normal business
- Collide with capacity constraints

Temporary

- Demand permanent infrastructure
- Place irregular demands on service economy

Commercially Extravagant

- Distorts demand patterns
- Promotes investigator bias
- Data measurement error



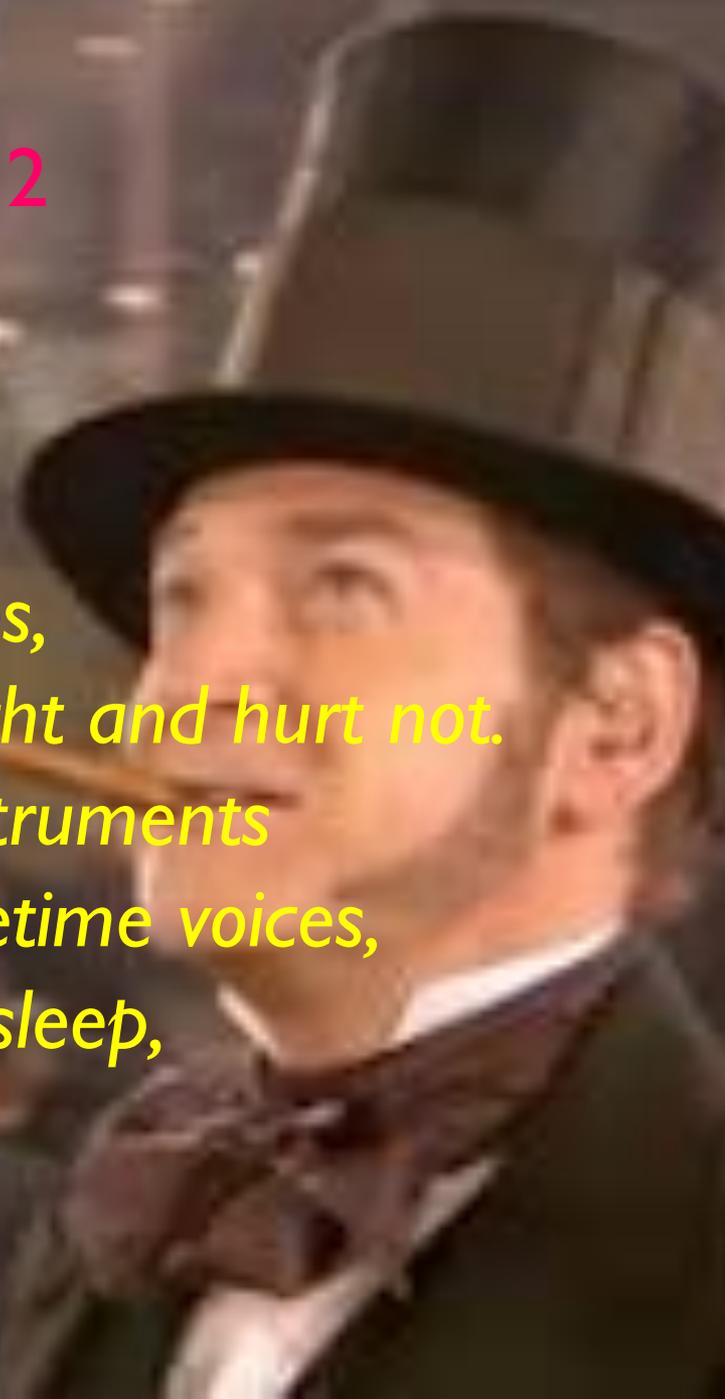
Highest Political Stakes

Anything sacrificed to save face

- Money
- Transport
- Businesses
- Reality

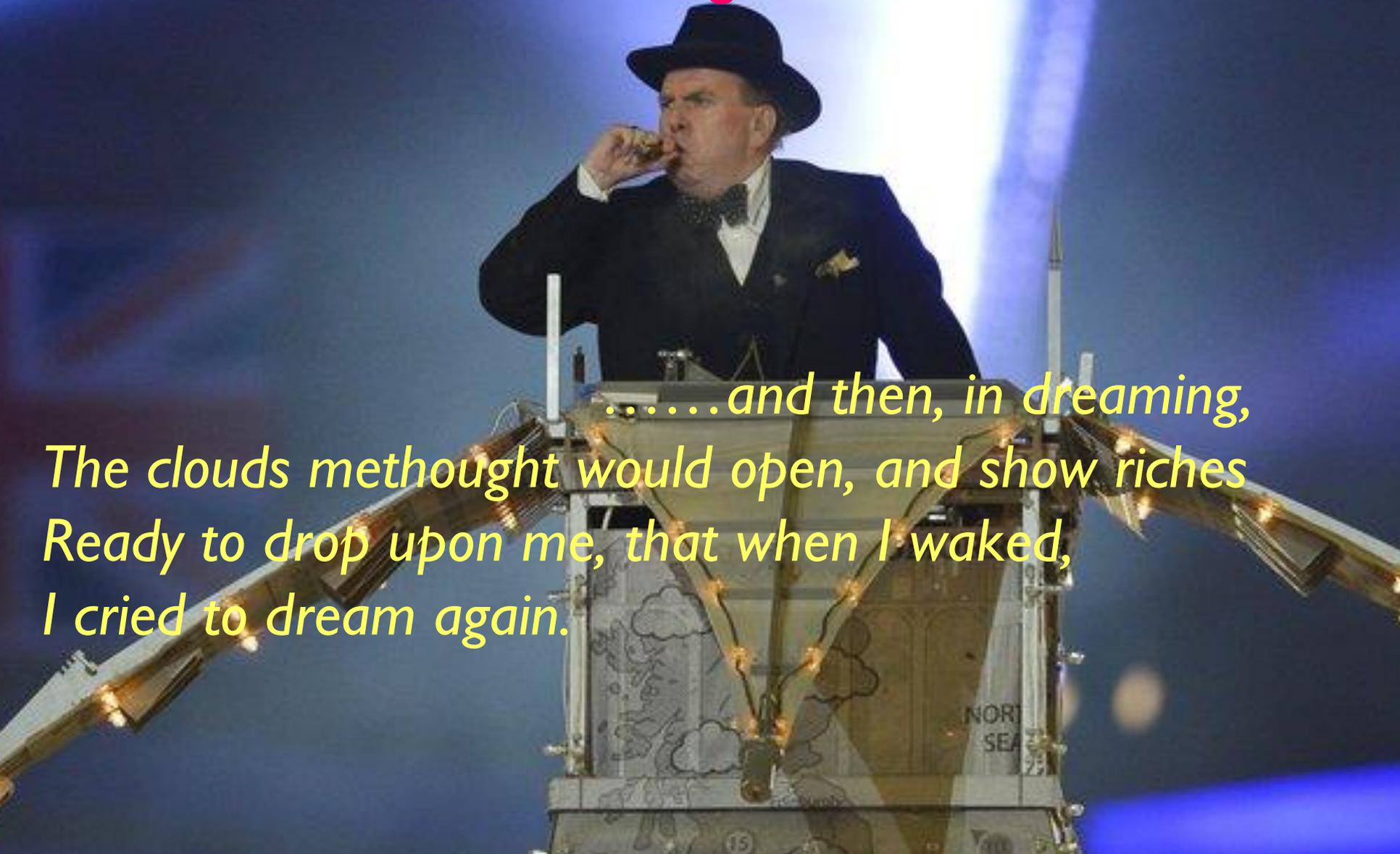
27th July 2012

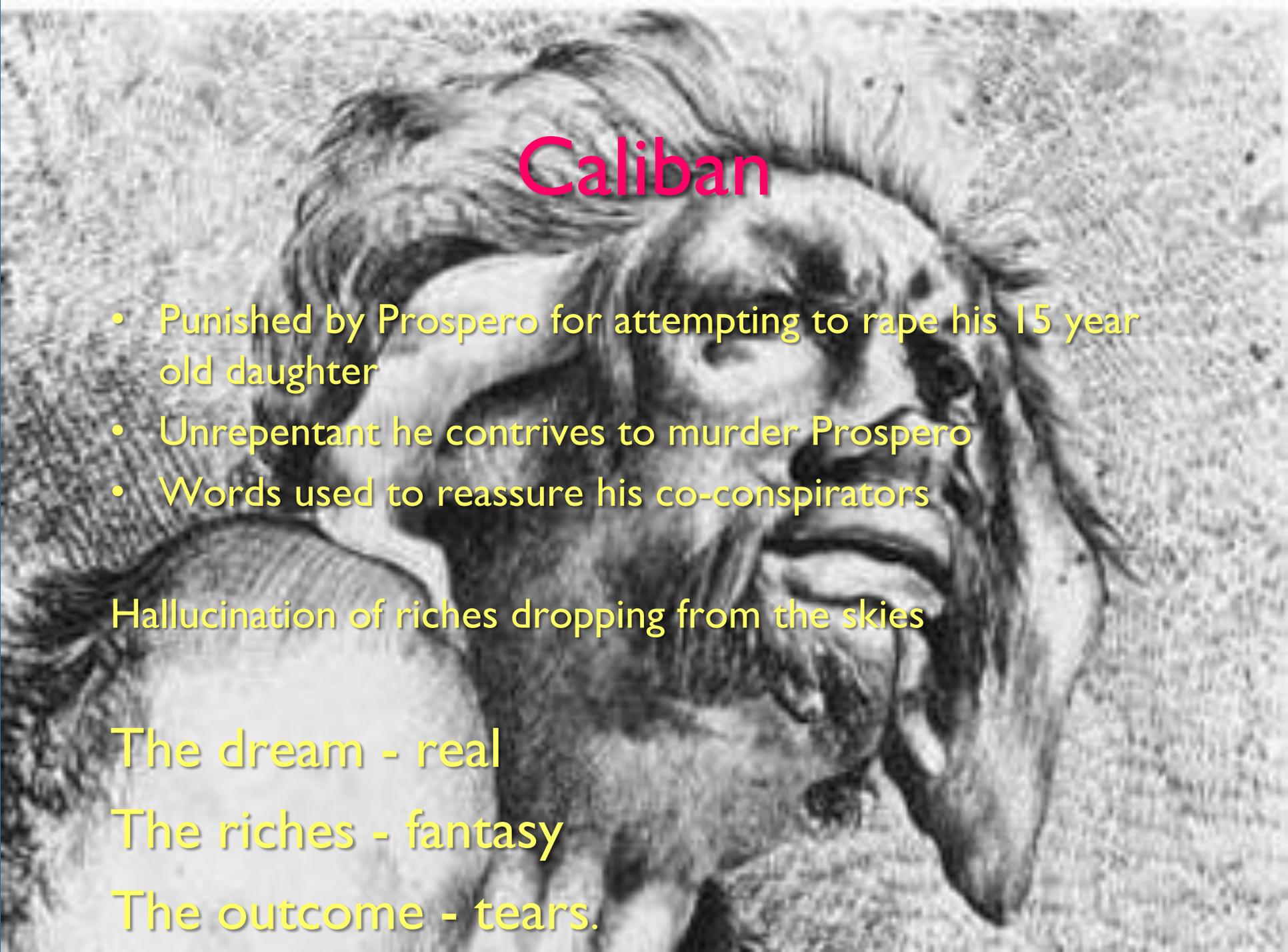
*Be not afeard. The isle is full of noises,
Sounds and sweet airs that give delight and hurt not.
Sometimes a thousand twangling instruments
Will hum about mine ears; and sometime voices,
That, if I then had waked after long sleep,
Will make me sleep again.....*



12th August 2012

*.....and then, in dreaming,
The clouds methought would open, and show riches
Ready to drop upon me, that when I waked,
I cried to dream again.*





Caliban

- Punished by Prospero for attempting to rape his 15 year old daughter
- Unrepentant he contrives to murder Prospero
- Words used to reassure his co-conspirators

Hallucination of riches dropping from the skies

The dream - real

The riches - fantasy

The outcome - tears.