



Analysis of Physical Activity on the Tidal Thames

Prepared for Port of London Authority

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Section 1: Introduction

This insight report aims to provide Port of London Authority with a concise summary of current and potential opportunities for sport and recreation along the Tidal Thames.

London Sport have carried out this work in support of Port of London Authority's 20 year aim to see greater participation in sport and recreation on and alongside the water as part of the greater Thames Vision project.

The scope of the work included gathering primary data through a research survey and identifying the key trends influencing participation behaviour. The results are finalised as a set of recommendations for potential approaches to increasing sport and recreation along the Tidal Thames.

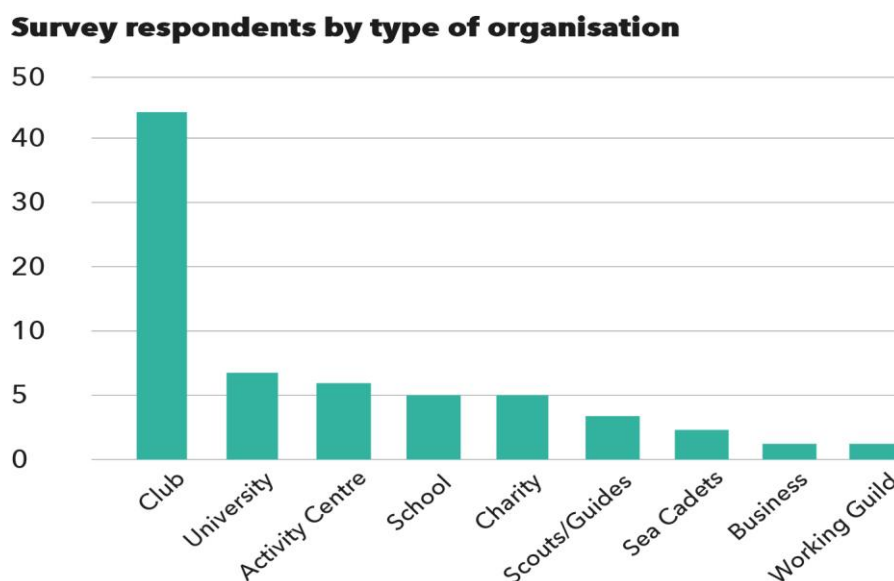
Thank you to all the organisations that provided information and contributed to the research, including the Port of London Authority, British Rowing, British Canoeing, the Royal Yachting Association, Active360 and London Youth Rowing.

Scope of research

This report focused on presenting findings from the Tidal Thames Sport and Recreation Activity Survey which was completed between 9th October 2016 – 23rd January 2017 by identified organisation and clubs operating on or alongside the River Thames in and around London.

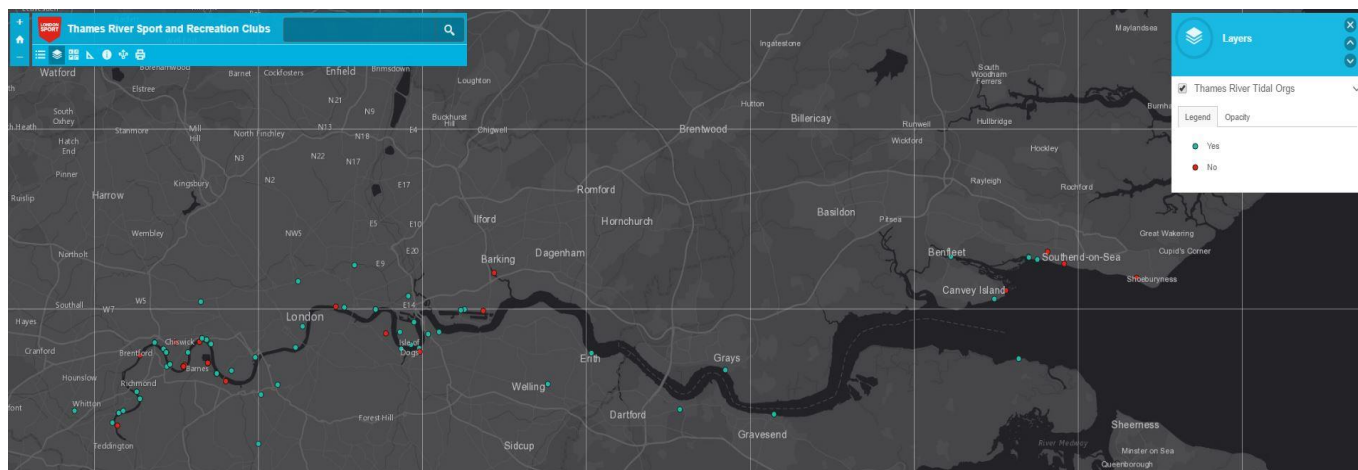
The survey was sent out to 145 organisations operating on the Tidal Thames. A total of 73 unique clubs and organisations who operated on the Tidal Thames responded to the survey request. This represents over 50% of all identified organisations operating in this area. The majority of the respondents were clubs (58.9%), while feedback was also collected from educational institutions, activity centres, charities and other organisations operating along the river. A full breakdown of organisations contacted is available in Appendix 1. Figure 1 below outlines the number of respondents by organisation type.

Figure 1: Number of respondents by organisation type



Responding organisations were located along the length of the Tidal Thames. The majority of responding organisations were located in west and south-west London (45), 8 in central London and 20 in the identified East London growth opportunity zone. The East London opportunity zone maps can be found in appendix 2. Figure 2 highlights the location of responding (blue) and non-responding clubs along the Tidal Thames.

Figure 2: Map of respondent vs non-respondent organisations



To undertake further spatial analysis and access information on the organisations involved this research, please click on the link below to view the accompanying mapping tool:

<http://londonsport.maps.arcgis.com/apps/View/index.html?appid=fa0cb934476a46daad3a182e7f61184f>

Considered data

Data on sport and recreation activity on and around the Tidal Thames was considered from the following sources:

- Survey responses
- NGB participant and events data

A full list of survey responses has been included as a supplement to this report. An analysis of all considered datasets has been presented in the next section of this report.

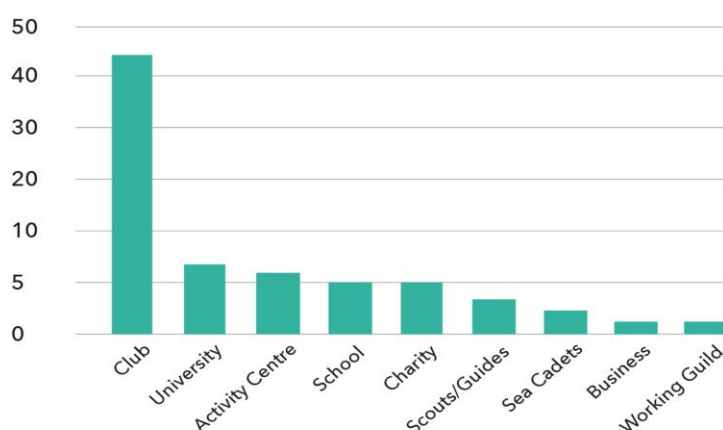
Section 2: Findings

The majority (58.9%) of respondent organisations considered themselves to be sport and recreation ‘clubs’, broadly reflective of the current overall delivery model for sport and recreation across England.

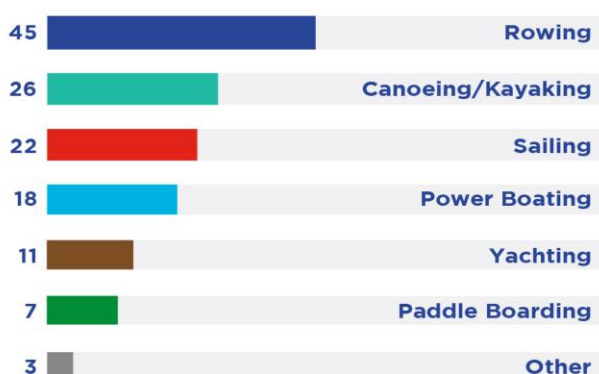
The most common activity delivered on the Tidal Thames is rowing, delivered by over 60% of the respondent organisations. Canoeing/kayaking (36%), sailing (30%), and power boating (25%) are also delivered by a significant proportion of organisations. Figure 3 outlines the type of organisations, activities delivered and level of participants catered for by the responding organisations.

Figure 3: Organisation delivery overview

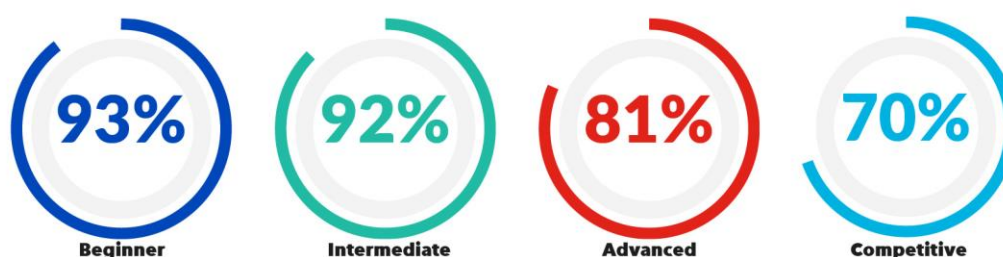
Survey respondents by type of organisation



Activities delivered by respondent organisations



Percentage of organisations delivering to each participation level



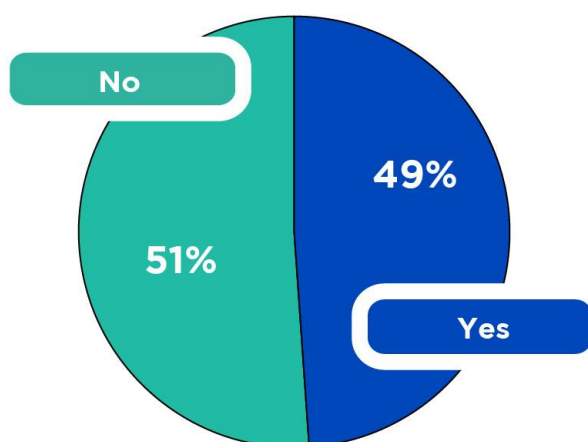
The main focus of delivery organisations is on beginners and intermediate level participants, with over 90% of responding organisations catering for both of these groups. Advanced and competitive participants are also well catered for along the Tidal Thames.

Less than half (49%) of organisations operating on the Tidal Thames stated that they deliver activities to non-members. Potentially, organisations could be encouraged to deliver to external participants on the following basis:

- Increased revenue
- Potential to transfer non-member participants to membership once they are 'hooked'
- Utilise off-peak times to develop sport for the identified low participation target groups (e.g. women and girls, youth aged 11-24, BAME groups etc.).

Figure 4: Delivery of activities to non-members

Delivery to non-member participants



Current Participation

Self-declared participant and membership data was gathered through the survey in order to enhance understanding of participation levels and potential capacity to grow participation. Please note that additional participation data was supplied by British Rowing, this data has been added where appropriate to enhance analysis.

Figure 5: Participation trend over the last 12 months

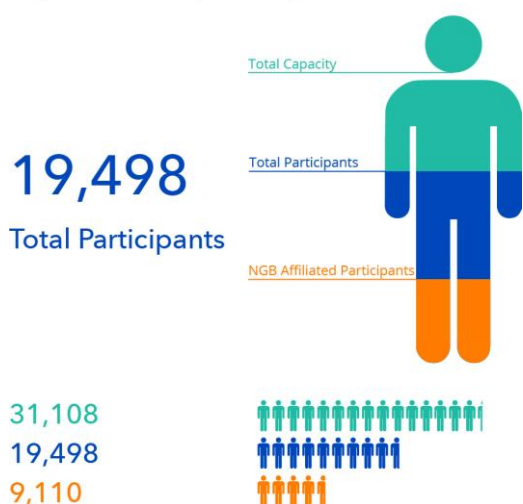


Positively, 58% of organisations surveyed reported an increase in participation over the last 12 months, while 9% reported a decrease and 33% stated that participation has remained largely the same. Going forward, it would be beneficial to identify the differentiating factors affecting participation trends across London in order to understand best practice and future opportunities.

Participation¹ in organised sport and recreation amongst the 73 respondent organisations and British Rowing clubs is estimated to be 19,498. These figures do not account for participation in non-responding organisations or un-monitored participation (e.g. individuals etc.). National Governing Body registered members account for approximately 47% of organised participation. The overall estimated maximum capacity is 31,108 participants/members; capacity is explored in further detail later in the report. Figure 6 presents participation by capacity and NGB affiliation.

Figure 6: Organised participation numbers

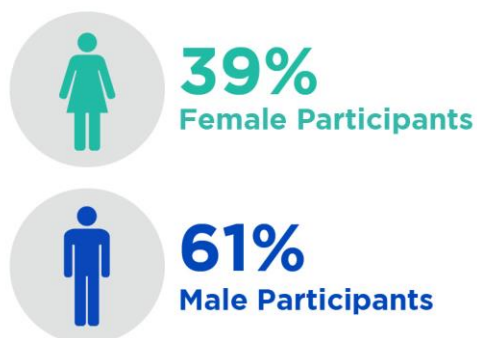
Organised Participation Figures



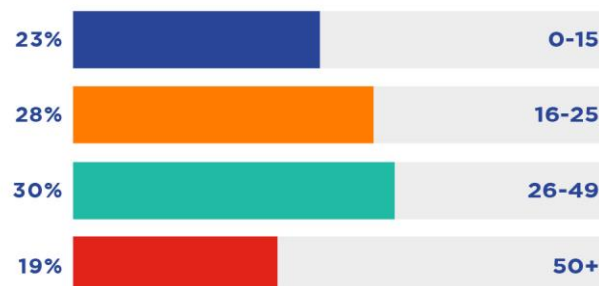
¹ Participation is based on a combination of self-declared membership and/or participation in organised activity

Figure 7: Participation Demographics

Participation by Gender



Participation by Age



The majority of participants partaking in organised sport and recreation along the river Thames are male (61%). Participation rates decrease with age, 51% of participants are aged under 25 while 19% are aged 50+. The largest segment of participants are likely to be aged 26-49 (30%).

Due to limitations in the sample size, response rate and validation of demographic data, participation data on Black, Asian, and Minority Ethnic groups (BAME) and disability groups has not been made available.

Capacity

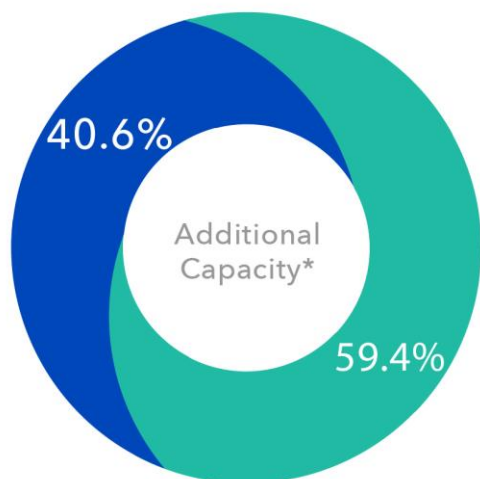
Unused capacity² across the 73 respondent organisations on the Tidal Thames is estimated at 40.6%. This represents the potential to increase participation by over 13,000 individuals in these organisations alone.

The greatest area for potential impact by organisation type is through 'clubs' where the overall maximum capacity represents 65% of all potential participation along the Tidal Thames, but the current average operational capacity is only 51%. Working within the existing club infrastructure, there is the opportunity to increase participation by approximately 10,500 participants, almost double the amount of participants currently taking part through clubs. Figure 8 presents potential capacity by organisation type.

² Unused capacity refers the difference between current participation/membership and the maximum capacity stated by the responding organisation

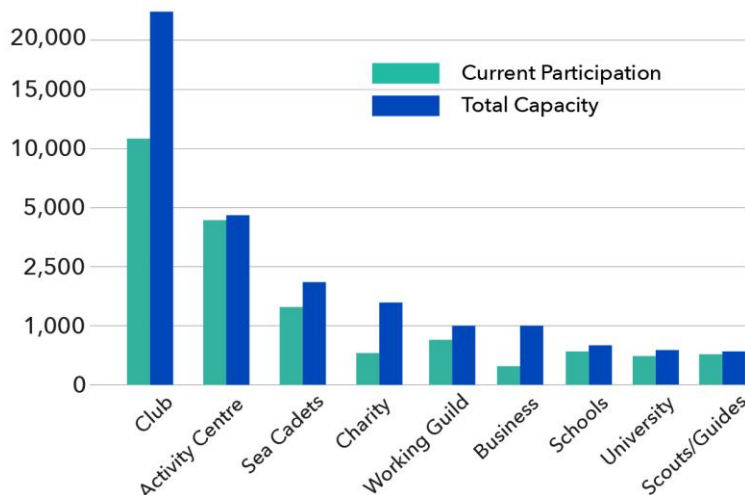
Figure 8: Capacity to increase participation

Additional Capacity



*Does not include club data provided by British Rowing

Participation Numbers and Capacity by Organisation Type



Events

Figure 9 provides an overview of event numbers, participant numbers and spectator numbers for events organised or co-organised by the respondent organisation.

Figure 9: Events

39
Organisations

Total number of responding organisations hosting or co-hosting events along the Tidal Thames.

115
Events

Total number of events hosted or co-hosted by responding organisations along the Tidal Thames.

39 out of the 73 respondent organisations host, co-host or assist the organisation of events along the Tidal Thames. Together, they host approximately 115 unique events.

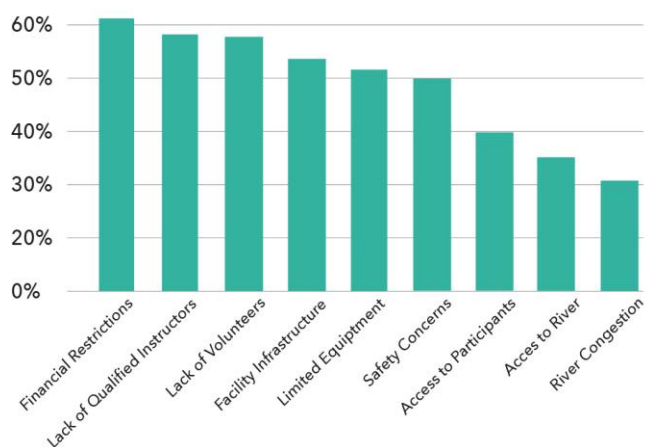
Hosting events represents a substantial opportunity to increase participation along the Thames whilst simultaneously increasing the economic and social impact of sport and recreation on local communities located along the Tidal Thames.

Growing Participation

Financial concerns (62%), lack of qualified instructors (58%) and lack of volunteers (58%) were found to be the most restrictive barriers facing the highest percentage of organisations aiming to increase participation. Over 50% of organisation also stated that facility infrastructure and limited equipment were highly restrictive. Figure 10 below outlines the percentage of organisations that found barriers either ‘moderately’, ‘very’ or ‘extremely’ restrictive to increasing participation, and the areas where they believe they could benefit the most from Port of London Authority support.

Figure 10: Barriers and potential areas for PLA support

Barriers to increasing participation



Potential Areas for PLA Support



In line with the stated barriers, the highest percentage of respondent organisations believe they can benefit most from support from the Port of London Authority in relation to financial support (41%) and facility development (37%).

‘The lack of good changing facilities, showers and social areas puts many people off, especially when the weather is not great’

(Club)

Improved access to the river (32%) is also seen as an important area that the Port of London Authority can have an impact on participation.

Only 13.7% of facilities are fully accessible to participants with disabilities, while 41% provide partial access.

With 47% of respondent organisations stating that they would welcome support to improve disability access, this is an area that can be vastly improved to ensure equal opportunities and provide facilities to increase disability participation. Figure 11 outlines the levels of access for disabled participants.

Figure 11: Facility access for disabled participants



Figure 12 presents the perceived importance of target groups for increasing participation. Overall, a higher percentage of clubs stated that targeting beginners (82.3%) and intermediate (78%) level participants is more important for increasing participation than targeting those of an advanced or elite level (41.2%).

Additionally, women and girls (75%) and youth participants aged 11-24 (71%) are considered the target groups with the most potential to expand participation. Those from deprived

communities (55%) and BAME groups (54%) were also considered attractive target groups by over 50% of respondent organisations.

Figure 12: Perceived importance of target groups for increasing participation

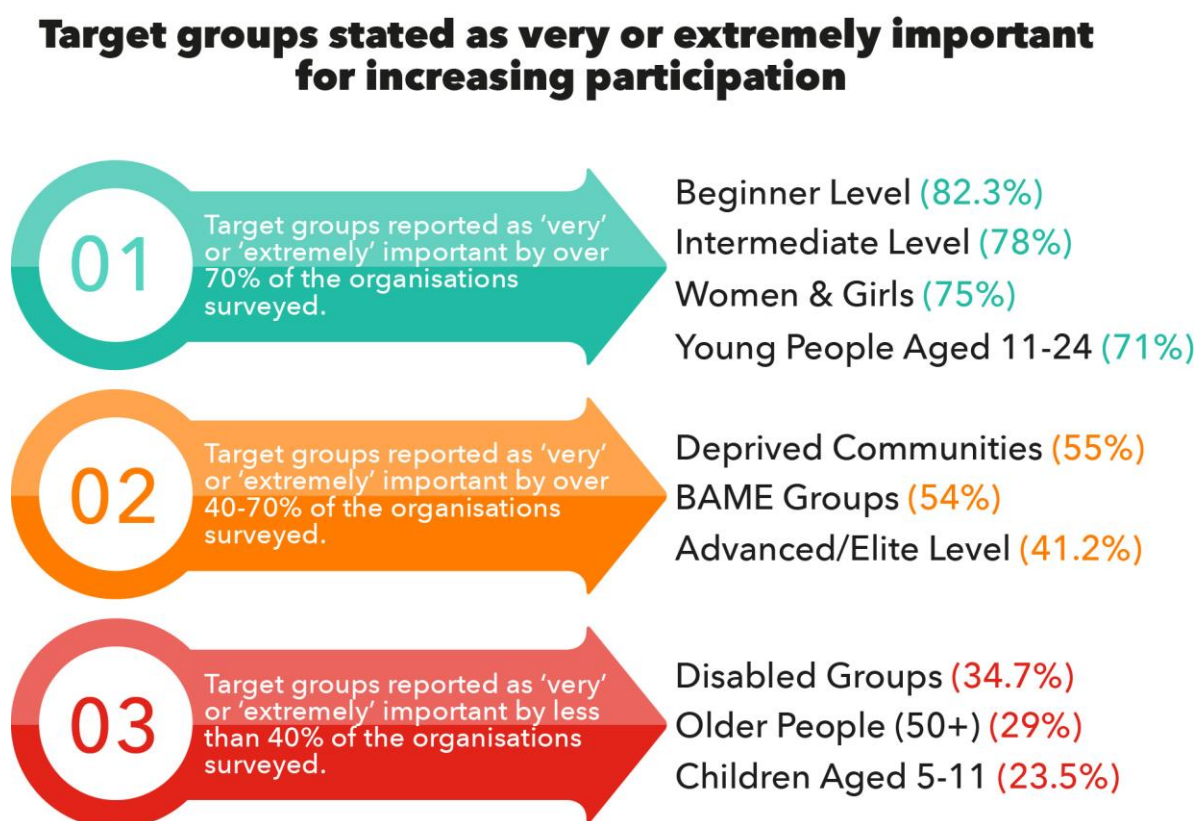


Figure 13 highlights that the majority of respondent organisation (58.8%) believe that increasing membership represents the greatest opportunity to increase participation along the Tidal Thames. However, this contradicts the importance of certain target groups such as young people, BAME groups and deprived communities where income levels are likely to be lower than the London average. In these cases, membership costs act as a deterrent.

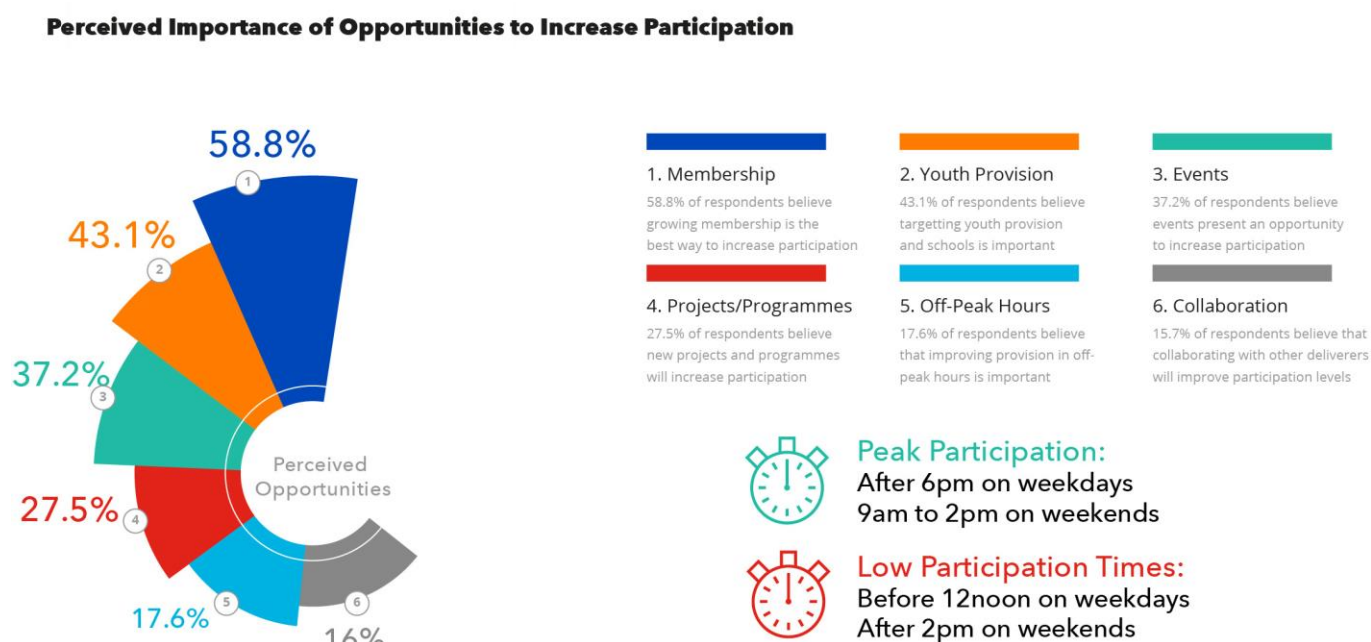
'Recruitment is our main way of increasing numbers. This is the number 1 method.'

(University)

Potentially, a better way to reach these groups would be through events and projects/programmes, both of which were also considered high potential opportunities to increase participation.

Notably, off-peak provision (before 6pm on weekdays and after 2pm on weekends) did not feature highly as an opportunity to increase participation. This may be due to other barriers such as a lack of available instructors and/or volunteers.

Figure 13: Perceived importance of opportunities to increase participation





Positively, out of the 73 respondent organisations, 62% explicitly stated that they would be interested in working with the Port of London Authority to develop participation in sport and recreation along the Tidal Thames. Only 9% said they would not be interested, while a further 29% chose not to answer the question.

Figure 14: Interested in working the PLA to increase participation

Expressed interest in working with the PLA to develop sport and recreation along the Tidal Thames



Section 3: East London Opportunity Zone Factsheet

Figure 15: East London Zone Factsheet Part 1

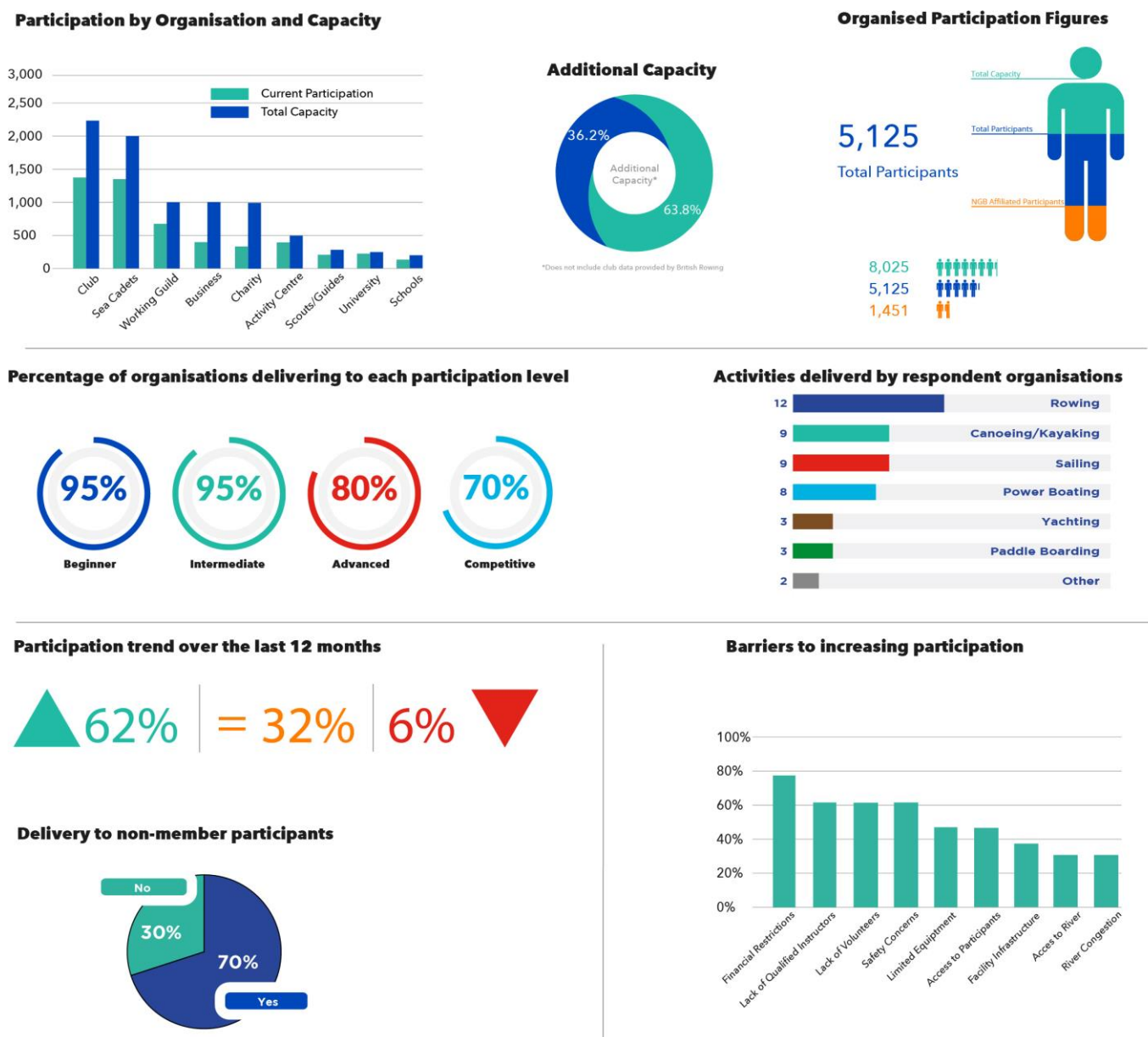


Figure 16: East London Zone Factsheet Part 2

Target groups stated as very or extremely important for increasing participation



Potential Areas for PLA Support



Perceived Importance of Opportunities to Increase Participation



Expressed interest in working with the PLA to develop sport and recreation along the Tidal Thames



Unique factors affecting the East London opportunity growth zone:

- Type of organisations operating in the area:
 - Higher proportion of activity centres and charities (low response rate from activity centres)
- Higher rate of delivery to non-member participants
- BAME groups found to be of increased importance as a target group
- 'Improved river access' features highly as an area for support
- 'Projects/programmes' considered the best way to increase participation in the area
 - Traditional membership not considered a key method for increasing participation

Section 4: Sport Specific Factsheet (Rowing)

Figure 17: Rowing Factsheet Part 1

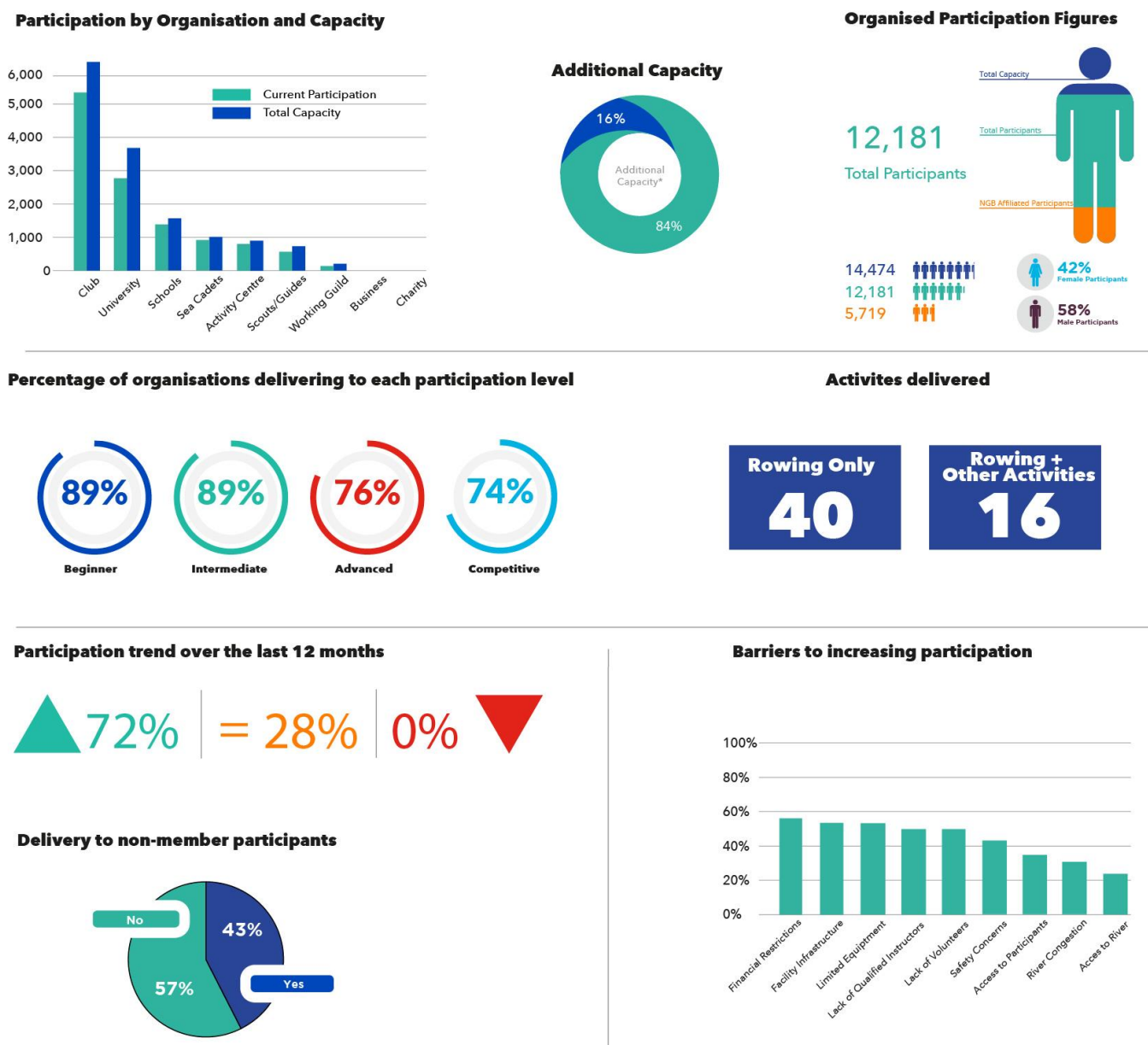


Figure 18: Rowing Factsheet Part 2

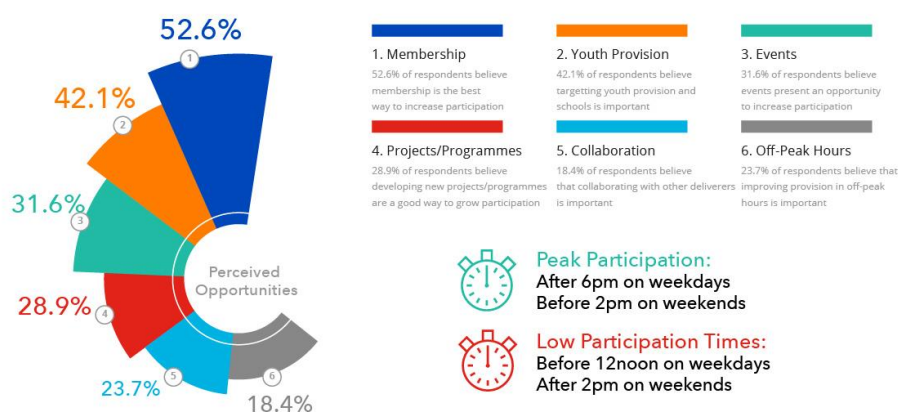
Target groups stated as very or extremely important for increasing participation



Potential Areas for NGB Support



Perceived Importance of Opportunities to Increase Participation



Expressed interest in working with the British Rowing and the PLA to develop sport and recreation along the Tidal Thames



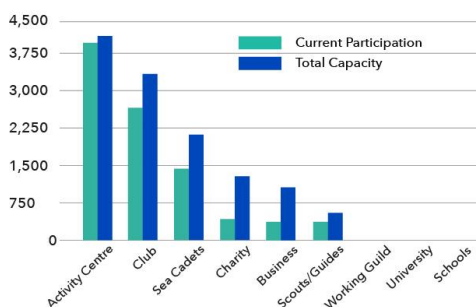
Unique factors affecting rowing in and around London:

- Type of organisations operating in the area:
 - Alongside clubs, universities and schools make up the majority of delivery bodies
- Highest participation numbers but lower capacity to increase participation than other sports (16%)
 - Participation increasing at a higher rate than other sports
- Low rate of delivery to non-member participants
- Women and girls found to be of increased importance as a target group
- 'Facility infrastructure' and 'instructor training' feature highly as areas for support
- 'Traditional membership' considered the best way to increase participation

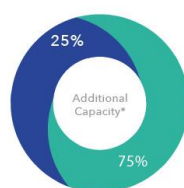
Section 5: Sport Specific Factsheet (Canoeing/Kayaking)

Figure 19: Canoeing/Kayaking Factsheet Part 1

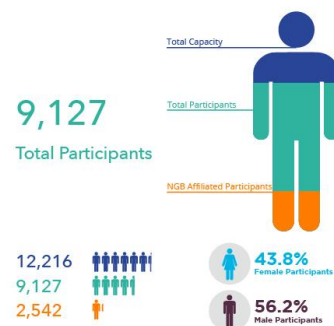
Participation by Organisation and Capacity



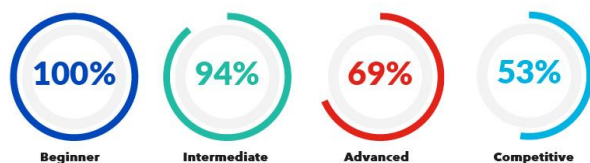
Additional Capacity



Organised Participation Figures



Percentage of organisations delivering to each participation level



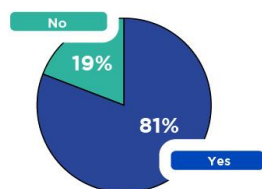
Activities delivered



Participation trend over the last 12 months



Delivery to non-member participants



Barriers to increasing participation

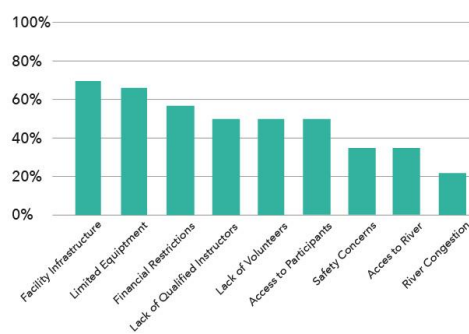


Figure 20: Canoeing/Kayaking Factsheet Part 2

Target groups stated as very or extremely important for increasing participation



Potential Areas for NGB Support



Perceived Importance of Opportunities to Increase Participation



Expressed interest in working with their NGB and the PLA to develop sport and recreation along the Tidal Thames



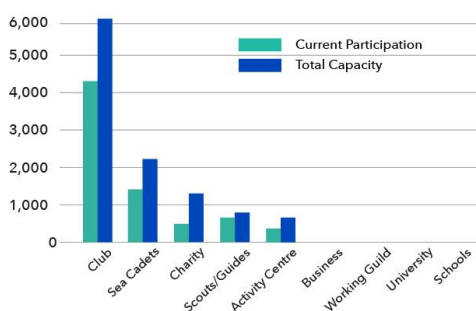
Unique factors affecting canoeing/kayaking participation in and around London:

- Type of organisations operating in the area:
 - Activity centres most likely to type of organisation to deliver canoeing/kayaking
 - Over half of the delivery organisations deliver multi-sport activities
- High rate of delivery to non-member participants (81%)
- Facility infrastructure and limited equipment seen as key barriers
- Young people aged 11-24 found to be highest importance as a target group
- 'Traditional membership' considered the best way to increase participation (48%)
 - Closely followed by youth provision (40%)

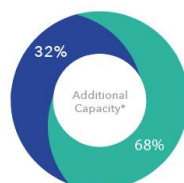
Section 6: Sport Specific Factsheet (Sailing/Yachting)

Figure 21: Sailing/yachting Factsheet Part 1

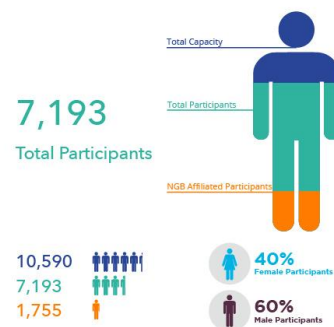
Participation by Organisation and Capacity



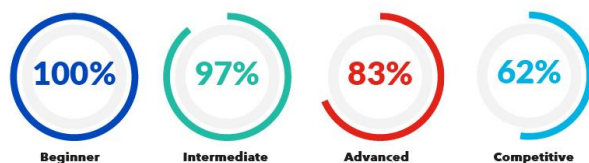
Additional Capacity



Organised Participation Figures



Percentage of organisations delivering to each participation level



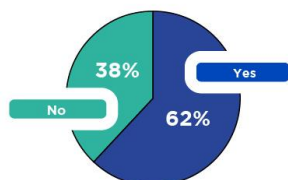
Activities delivered



Participation trend over the last 12 months



Delivery to non-member participants



Barriers to increasing participation

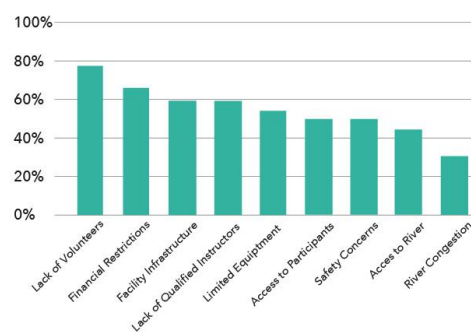


Figure 22: Sailing/yachting Factsheet Part 2

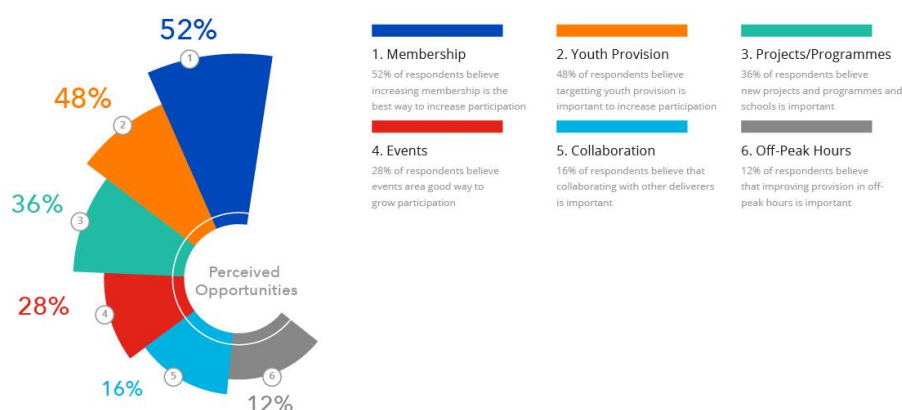
Target groups stated as very or extremely important for increasing participation



Potential Areas for NGB Support



Perceived Importance of Opportunities to Increase Participation



Expressed interest in working with their NG and the PLA to develop sport and recreation along the Tidal Thames



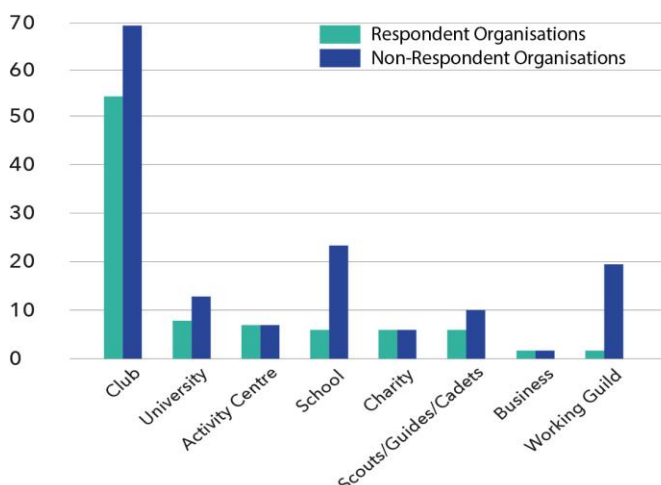
Unique factors affecting canoeing/kayaking participation in and around London:

- Type of organisations operating in the area:
 - Dominated by traditional club delivery
- Limited number of sailing/yachting only clubs, majority of delivery is alongside other sports and activities
- Highest rate of organisations reporting a participation decrease (17%)
- Lack of volunteers seen as a key barrier by 77% of organisations
- Young people aged 11-24 found to be highest importance as a target group (96%)
- 'Traditional membership' considered the best way to increase participation (52%)
 - Closely followed by youth provision (48%)

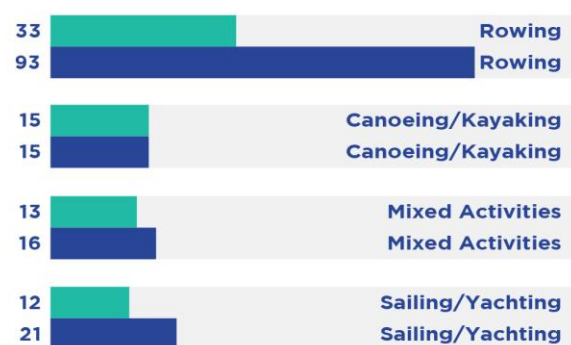
Appendix 1: Baseline of Identified Organisations

Figure 23: Baseline of identified organisations

Baseline of organisations identified by type



Primary activities delivered by identified organisations



Appendix 2: East London Opportunity Zone

Figure 24: East London opportunity zone

