

Port of London Authority

Public Engagement



Key findings

29 September 2021

Project details

PROJECT NAME	Public Engagement
CLIENT COMPANY NAME	Port of London Authority
SAMPLE	1,309 respondents: 1,000 adults who work or live on the Tidal Thames in London, Kent or Essex 309 adults who took part in a street survey by the tidal Thames in either London Bridge, Gravesend or North Greenwich
FIELDWORK DATES	20th – 29th July 2021

Summary

This research for the Port of London Authority among people living and working near the Tidal River Thames in London, south Essex and north Kent explores the public's perception, awareness and experiences with the River.

The perception of the River Thames among the general public is probably heavily driven by their experiences of Thames in central London, from the South Bank to Greenwich and the Docks. Hence cultural and historical activities and passenger transport are the things most people are aware of (57% and 52% respectively) and have experience of (both 33%). These are also the things they have been engaging in less due to the Covid pandemic (49% of previous visitors visiting a culture or tourist site less and 56% of river travellers travelling on the river less).

Knowledge and interest in the Tidal Thames as a place of commerce and industry (more likely to be further downstream from the centre of London), for example related to port trade, jobs or freight transport is lower (awareness of freight transport is 37% and port trade 22%). Older people are slightly more aware of these things (awareness rising to 50% and 32% respectively) but are far less interested in working in them (8% of over 55s are interested in working in port trade compared to 29% of people overall). While there is interest among some younger potential workers in jobs on the Thames (45%), awareness among this same group of port trade is low (13%).

There are many ways to engage people with activities and events on the River, mainly focussed on the historic sites (79% would be interested in culture and tourist sites, and 43% in world heritage sites specifically) and events related to food (70% are interested in cultural events and 50% in food festivals specifically), possibly linked by travel on the River itself (76% interested in doing so). This research is not able to isolate how the River itself is a driver to participation in activities or a feature in and of itself verses another location such as a park, but the strong, positive associations with the Thames suggest that it is an iconic part of London's history and geography.

It is clear that people expect the River Thames to provide and preserve a natural resource and habitat, with almost half (48%) saying the environment should be prioritised, followed by passenger transport (19%).

Perceptions of the Tidal Thames

- The Thames has more positive associations than negative (49% vs 35%), although being dirty or polluted is the number one unprompted association (31%).
- The vast majority of respondents said they thought it was easy for people like them to enjoy the river (87%). People living in Kent find it harder to enjoy (22% said it was difficult) and are less engaged with activities on the Thames. Greater transport links (9%) and improved cleanliness (9%) are top ways people suggested it would make it easier for them to enjoy the Thames.
- The Thames is most associated with cultural sites and activities (57%; tourist sites (49%) and culture activities (24%)) and passenger transport (52%). It is far less associated with port trade (22%) or job training (14%).

- Most people have seen the Thames recently. Two thirds of people last saw the Thames in the last month (66%). Half of parents say their children have seen the Thames in the last month (51%).

Experiences of the Tidal Thames

- Almost a third have run, walked or cycled the Thames Path (31%). Three quarters of those who have ever used the Thames Path are likely to have done so in the past year (73%). Perhaps as a result of pandemic and lockdowns, users were most likely to say the time they spend on the Thames Path this has either increased (38%) or stayed the same (34%).
- While passenger travel (33%) and visiting cultural sites (33%) and taking part in cultural activities (10%) are some of the top ways people have ever engaged with the Thames, people are more likely to have visited cultural sites (54%) or activities (44%) than travelled on the river (32%) in the last year, presumably because of the Covid pandemic and the closure of transport options. Avoiding travel and crowded spaces is the top reason for drop off in activities (30%).
- World heritage sites are the most common cultural activity people have visited (48% of those visiting cultural activities). Word of mouth is the most common way people have heard of cultural activities (45%).

Sporting activities on the Tidal Thames and inland waterways

- Overall, very few people take part in sporting activities on the Tidal Thames (c.7% of our sample).
- The Upper Thames, Central Thames and the Docks areas are the most used areas of the river for sporting activities (all 27%).
- Among the whole sample, a similar proportion of people said Covid they had increased or than decreased physical activity (28% vs 25% respectively).
- Post-pandemic facilities being clean and modern is a top motivator for taking part in activities (77% agree this is important).

Future engagement and participation

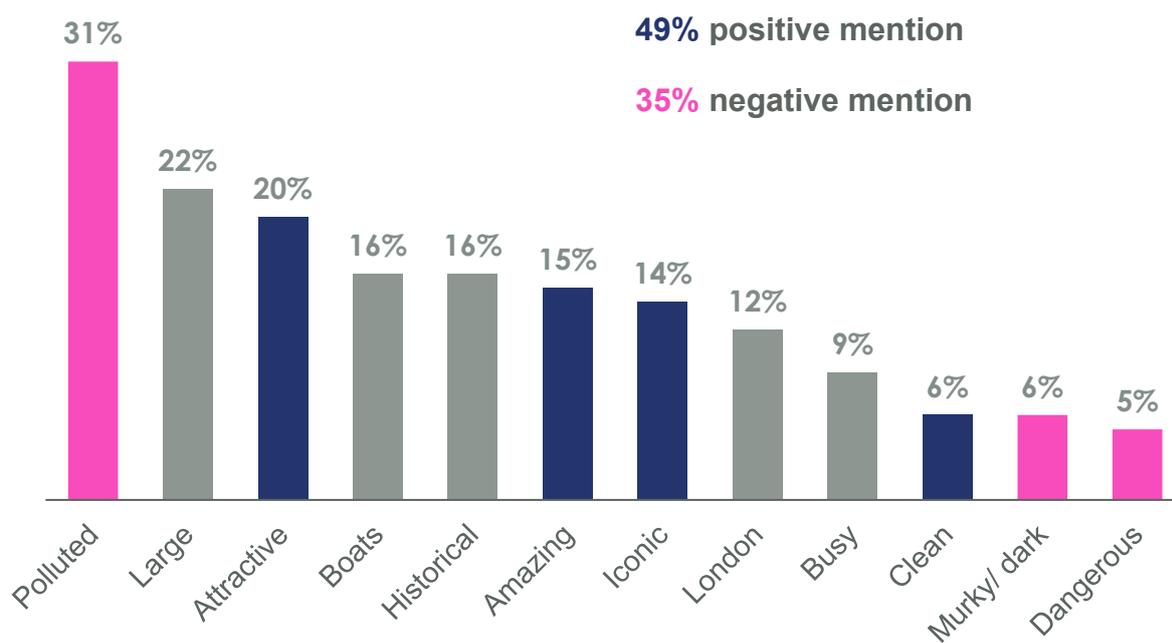
- People are most interested in visiting a culture or tourist site (79%) and travelling on the river (76%) in the future. Food (50%), Christmas markets (44%) and world heritage sites (43%) spark the most interest for future cultural activities.
- Social media (61%), word of mouth (35%) and newspapers and online adverts (both 33%) are the top ways people want to hear about things happening on the Thames.
- Lack of awareness (30%) and cost (29%) are the main barriers to taking part in physical activities on the Thames and time is the most common barrier to other activities.

Perception of the Tidal Thames

Overall respondents were more positive than negative about the Thames, with older respondents more likely to be positive

Overall half (49%) of respondents had something positive to say about the Thames when asked for their unprompted thoughts. This compares to just over a third (35%) who said something negative. However, sentiments around the Thames being polluted or unclean the single top response given, with 31% saying this. Separately only 4% remarked on the colour of it being brown or dark and 2% said it was murky or muddy (6% in total). The second most common theme of responses was in relation to the size of the Thames being large or big (22%), followed by its attractiveness (20%).

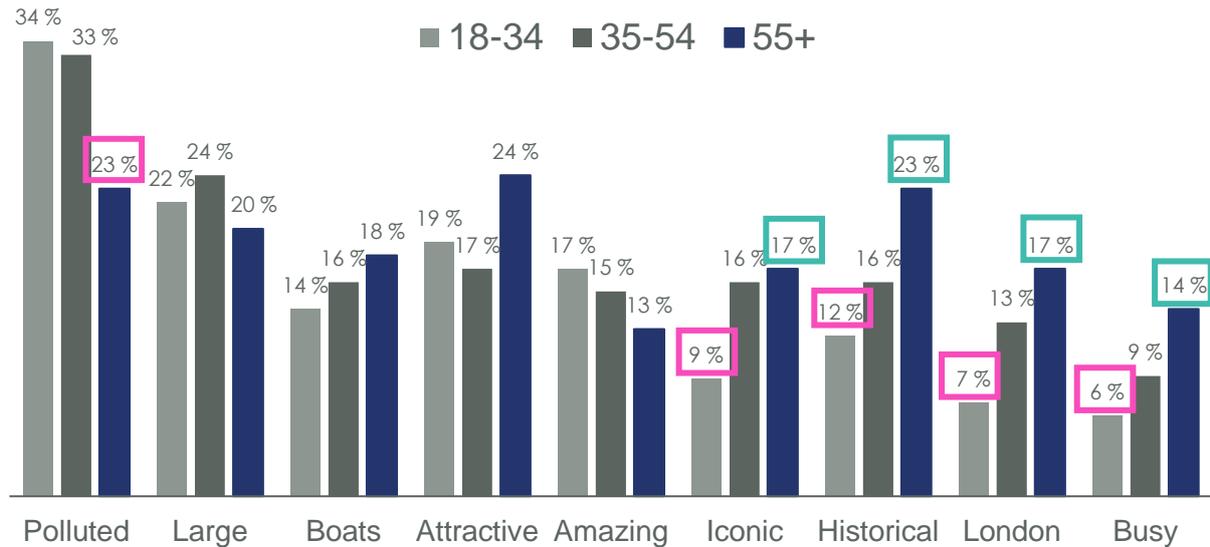
Unprompted associations with the Tidal Thames



Q1: What three words would you use to describe the River Thames? Base: All respondents, 1,309

The data showed that older respondents (i.e. those aged 55+) are more likely to have positive perceptions of the Thames overall (56%). In particular, they are more likely to mention that they think of the Thames as attractive (23%) historic (22%) or iconic (20%) and less likely to mention pollution or dirt (23%).

Unprompted associations with the Thames By Age



Q1: What three words would you use to describe the River Thames? Base: All respondents, 1,309

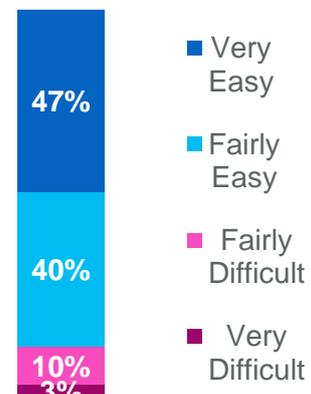
The majority of respondents think it is easy to enjoy the Thames, but greater transport links and reducing pollution are key to making it easier

Overall, most respondents (87%) felt that it was easy for someone like them to enjoy the River Thames, with only 13% saying they felt it was difficult.

For respondents who live (25%) and work (22%) by the river in Kent and part time workers (20%) are significantly more likely to think it is difficult to enjoy the Thames.

Among the online respondents we spoke to the top two ways they felt it could be made easier to enjoy the River Thames were greater transport links and making the Thames cleaner or less polluted (both 9%). While if we look specifically at those who say they think it is difficult to enjoy the Thames, making it cleaner or less polluted becomes significantly more important with nearly a quarter (23%) citing this. They are also more likely to want the Thames to be more accessible (13%) and feel it would help if they lived closer (6%).

How easy is it for people like them to enjoy the river?



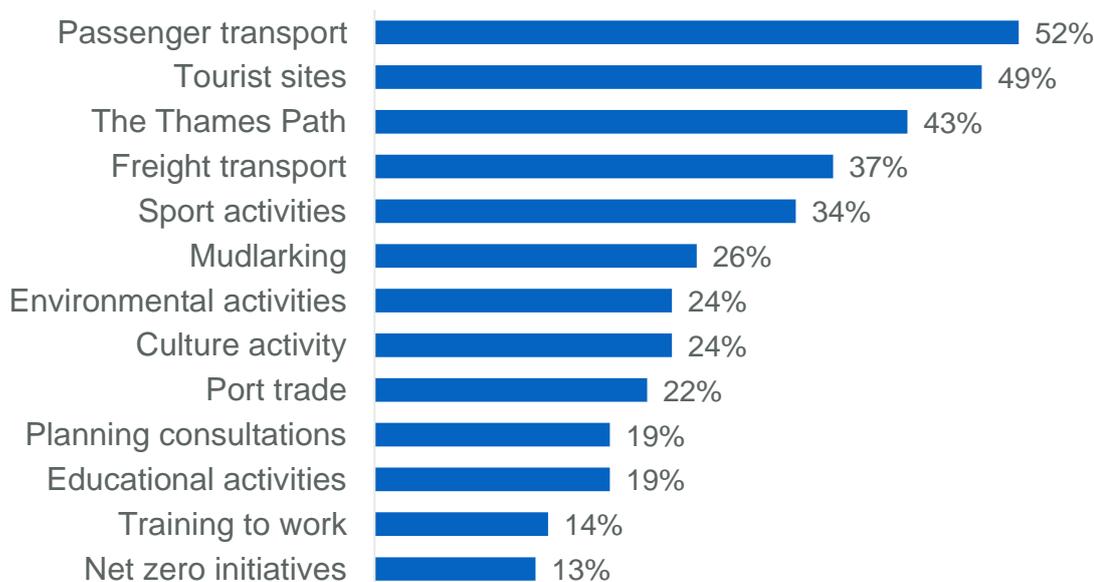
While younger respondents (those aged 18-34) were also more likely to cite making the river cleaner or less polluted (14%), they also wanted more attractions and activities by the Thames (7%), whereas older respondents (those aged 55+) wanted improved transport links (14%). Similarly, those living by the river in Kent (16%) and working by the river in Essex (18%) wanted greater transport links.

Awareness of activities and opportunities on the Tidal Thames

The Tidal Thames is most well-known for cultural activities, tourist sites and passenger transport, but awareness for industry on the Thames such as port trade and freight transport is lower

Over half of respondents (57%) said that they were aware of either cultural activities or tourist sites taking place on the Thames (49% said tourist sites and 24% said culture activities). Older respondents were more likely to be aware of the cultural activities and sites (69%). Following culture activities and sites, passenger transport was the next most well-known Thames activity with half (52%) saying they were aware of this taking place. Again, we saw that older respondents had higher awareness levels of passenger transport on the Thames (68%). In fact, older respondents were more likely to be aware of the majority of the activities, while those aged 18-34 were less aware of the majority.

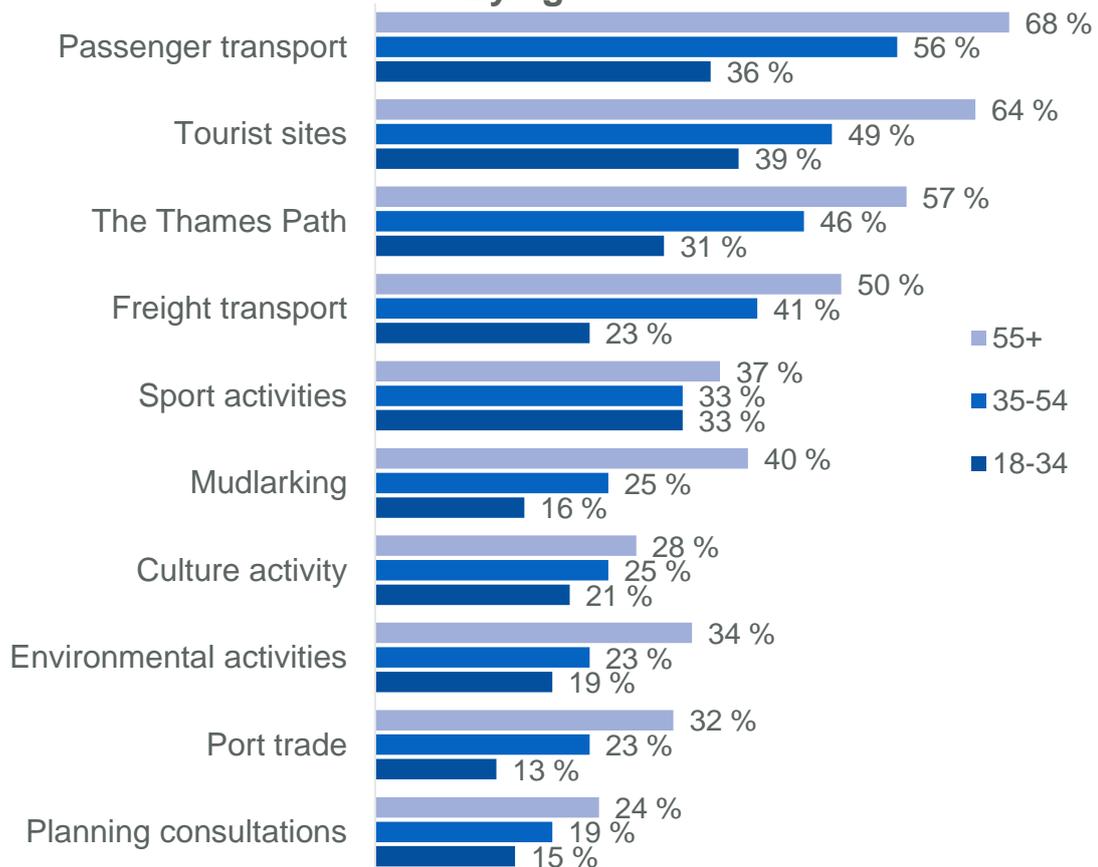
Awareness levels of activities on the Thames



Q6: Which of the following things are you aware of happening on or near the River Thames? Base: 1,309

The activities that had the lowest awareness levels were educational activities related to the Thames (19%), training to work on the river (14%) and net zero initiatives (12%).

Awareness levels of activities on the Thames By age



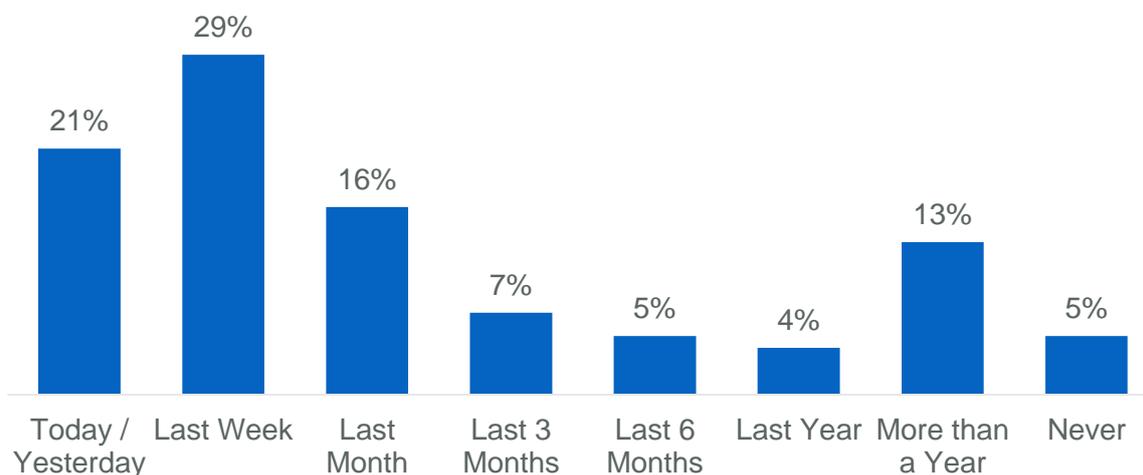
Looking to port trade specifically, just over a fifth (22%) were aware of this taking place on the Thames, though this falls to only 13% of those aged 18-34.

Those who live in authorities by the river in Essex (34%) and Kent (27%) were more likely to be aware of this activity, presumably because they are more likely to have seen trade related vessels and infrastructure. As for Freight Transport over a third (37%) were aware of this taking place on the Thames, increasing to nearly half (47%) among those living in Kent by the river and 45% of those living by the river in Essex.

Two thirds of online respondents saw the Tidal Thames in the last month and half of parents say their children have. In the street surveys most people were just passing through the area

Two-thirds (66%) of respondents from the online sample have seen the Thames in the last month, with half (50%) having seen it in the last week. Those who live in authorities by the river in Kent (23%) and Essex (24%) are more likely to say they last saw the river more than a year ago, whereas those living by the river in London are more likely to say they saw it today/ yesterday (23%).

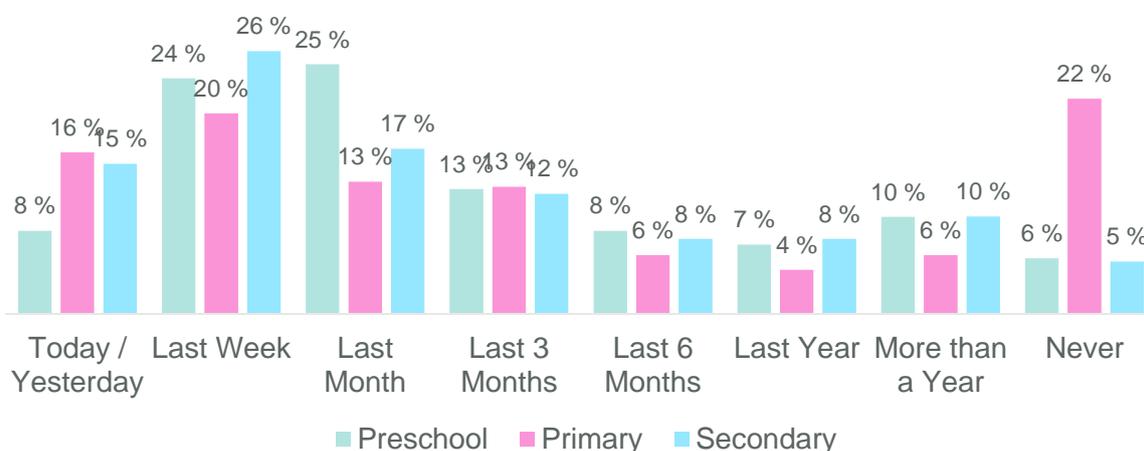
When did you last see the Tidal Thames?



Q2: When was the last time you saw the River Thames? Base: 1,000

Looking to children’s exposure to the Tidal Thames, half of parents (51%) say their children have seen the Tidal Thames in the last month, rising to 55% among those who live in authorities by the river. Over one in ten (13%) say their children have never seen the Thames, rising among fathers (16%) and parents aged 18-34 (22%). A similar proportion (14%) who live in authorities by the river say that their children have never seen the Thames. If we look specifically at parents who live in authorities by the river in London they are less likely to say that their children haven’t seen the Thames in the last year (9%), but 14% do say they have never seen the Thames.

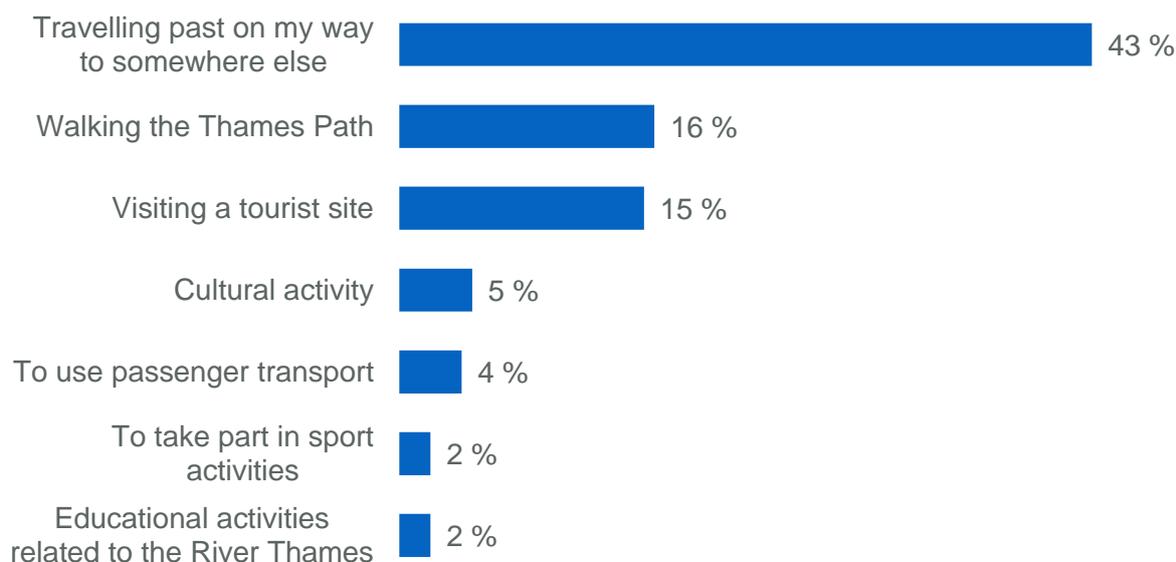
When did your child(ren) last see the Thames? % of those living in authorities by the river



Q3: When was the last time your child(ren) saw the River Thames? Base: Parents living in authorities by the river (400)

Of those surveyed face to face by the Tidal Thames, the most common reason for being there was to travel through to somewhere else (43%), this was most common in Gravesend where 54% gave this answer. A further 16% were walking the Thames Path, increasing to 21% in Gravesend and 19% in London Bridge. While 15% were visiting a tourist site, this rose to over a quarter (27%) in North Greenwich.

Top reasons for being beside the Tidal Thames



Intercept Q2: Why are you by the river Thames today? Base: 309

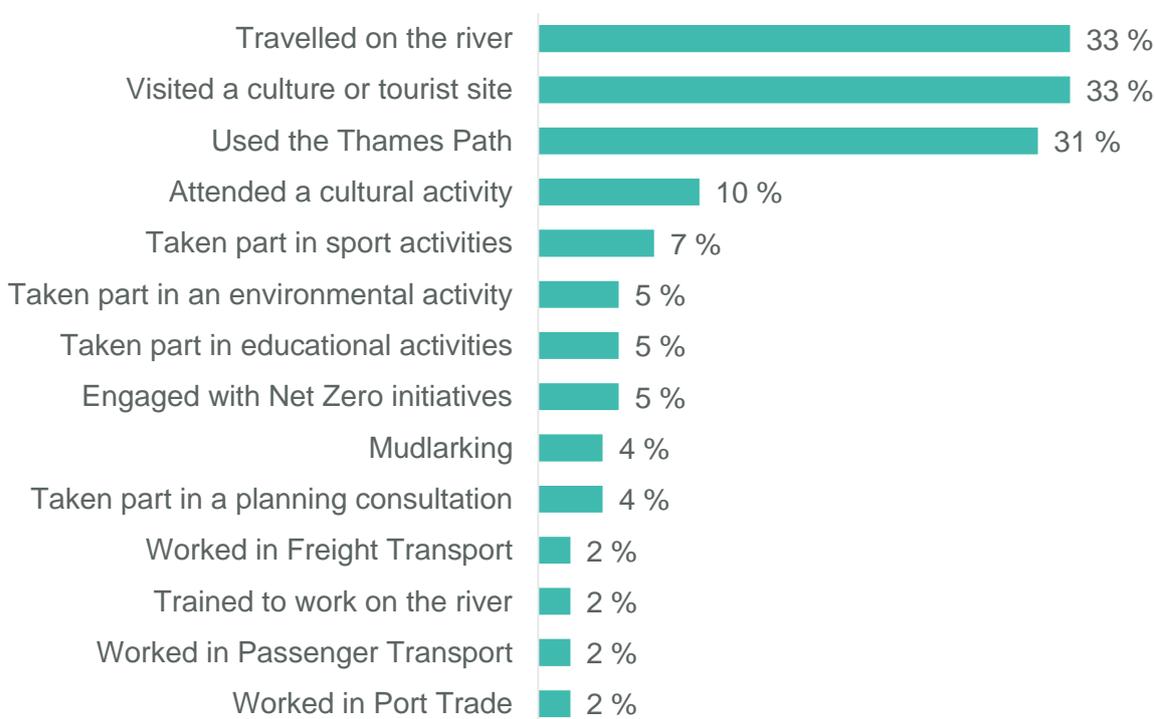
Engagement

Passenger travel, cultural sites and activities and the Thames Path are the top ways people are engaging with the Tidal Thames

Two fifths (36%) have participated in a cultural activity or visited a culture or tourist site (10% and 33% respectively). As with awareness, older respondents were more likely to have participated in culture on the Thames (44%), while those living by the river in Kent are less likely to have (28%). Passenger travel on the Thames was the second most common activity respondents had taken part in, with a third (33%) saying they had done this. However only a quarter (26%) of respondents from an ethnic minority background had done this, significantly less likely than white respondents.

The Thames Path was another popular activity with three in ten (31%) having ever walked this, again increasing among older respondents (42%). Those who live in authorities by the river in London are also more likely to have walked, ran or cycled along the Thames Path (34%).

Engagement with activities on the Tidal Thames



Q7. Have you ever done any of the following on or near the tidal River Thames? Base: 1,309

People are more likely to have used the Thames Path rather than visit cultural sites or taken part in activities in the past 12 months

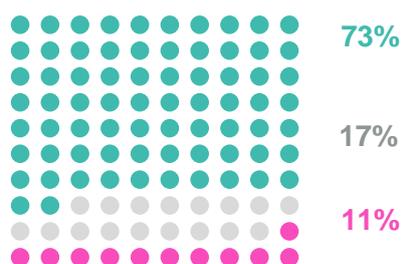
Of respondents who have walked, ran or cycled the Thames Path nearly three quarters (73%) have done so in the last 12 months, with younger respondents increasing to 86%. In comparison only around half (54%) of those who have visited a culture or tourist site have done so in the past 12 months, and even less (44%) have attended a cultural activity. As with use of the Thames Path younger respondents are more likely to say they have visited a culture or tourist site in the past 12 months (71%).

Perhaps unsurprisingly given the restrictions on transport during the last 12 months, despite being one of the most common activities respondents have ever taken part in, only a third (32%) have travelled on the river in the past 12 months. However as seen with other activities younger respondents have been more likely to have travelled on the river in the past 12 months (50%), whereas those aged 55 and over were more likely to have done so more than 3 years ago (45%).

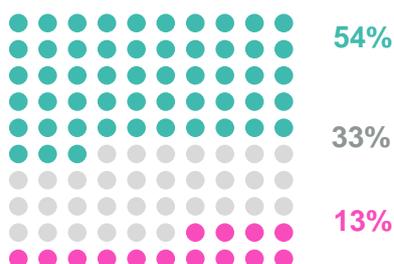
Last time people did activities and average time per week

● Last 12 months ● 1-3 years ago ● More than 3 years ago

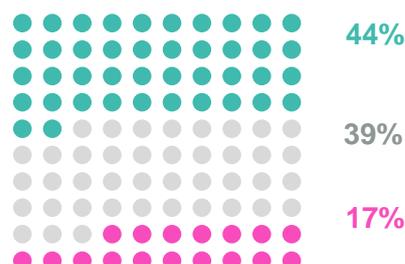
Walking, running or cycling the Thames Path



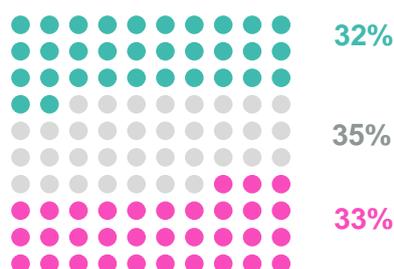
Culture or tourist site



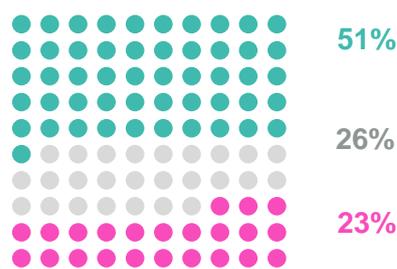
Cultural activity



Travelling on the river



Take part in sport activities



Q8. When was the last time you took part in any of the following? Base size 411, 427, 137, 437, 95

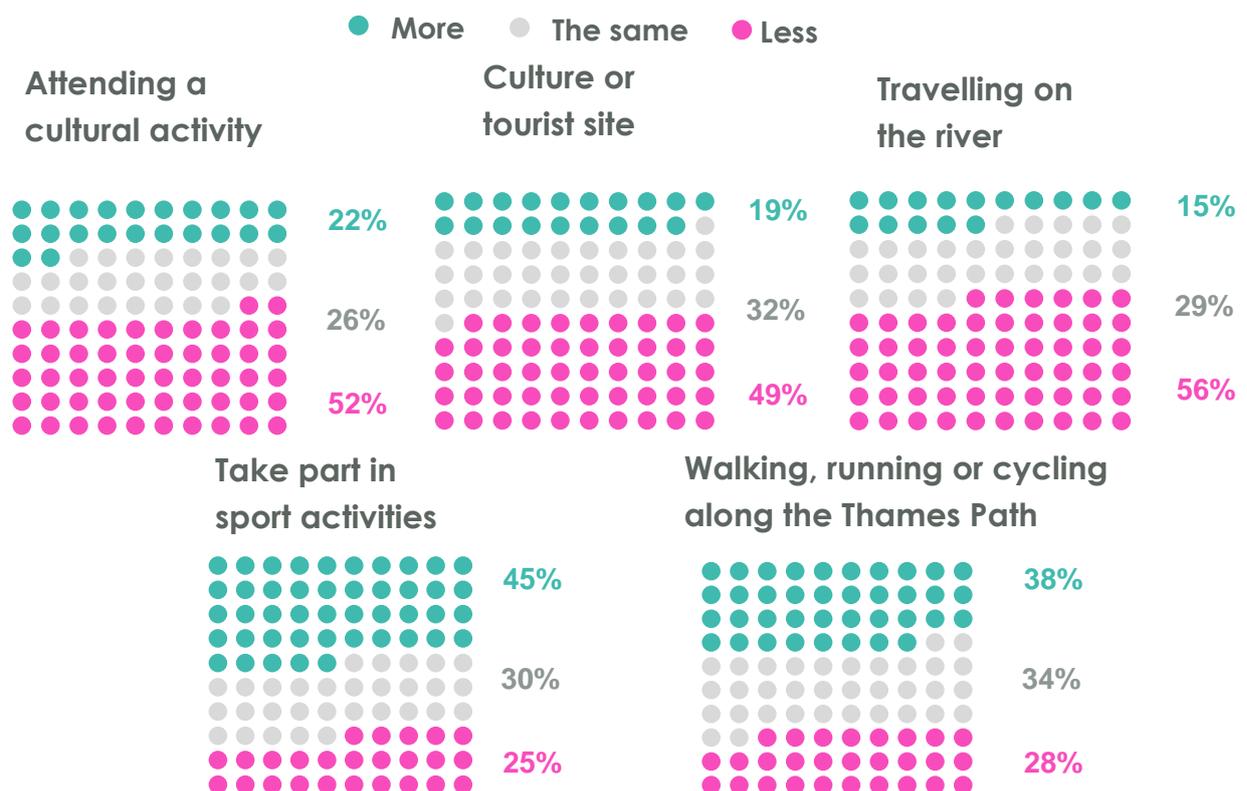
The pandemic has had a big impact on culture and travel with most people having done it less. While sporting activities and use of the Thames Path has stayed the same or increased

The pandemic has prevented people from taking part in cultural activities and visiting tourist sites as much as they would have usually. Half (52%) of those who have previously attended a cultural activity say they have done so less this year. Similarly, half (49%) of those who had visited a culture or tourist site in the past have done so less this year and, 69% for those aged 55+.

Despite this, it seems engagement with younger people has been more likely to increase than other age groups with 18-34 year olds more likely to say they have attended a culture or tourist site (38%) more than they usually would have. Similarly, 27% of 18-34s who have travelled on the river have done so more since the start of the pandemic compared to the average of 15%.

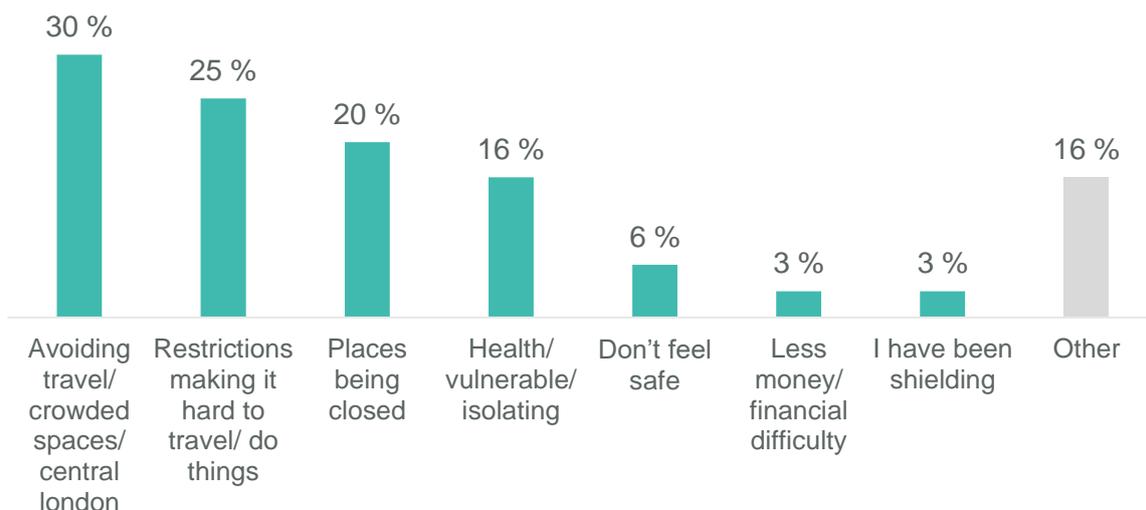
Whereas for sport activities and use of the Thames Path this has either increased or stayed the same. Three quarters (75%) of those who have taken part in sport activities have spent more time or as much time doing them as they would have since the start of the pandemic, with 45% having done it more and 30% the same as they would have usually. Similarly, 72% of those who have used the Thames Path have done so more or the same amount since the start of the pandemic, with 38% having done it more and 34% the same. In particular, people aged 18-34 are more likely to have been using the Thames Path (48%) more than they usually would have as were those living by the river in London (43%).

Change in time spent doing activities by the Tidal Thames



Avoiding travel, crowded spaces and central London (30%) was the top reason respondents gave for a decrease in the time spent doing activities since the start of the pandemic. Although for those living by the river in London avoiding travel and crowded spaces was less of a concern (24%).

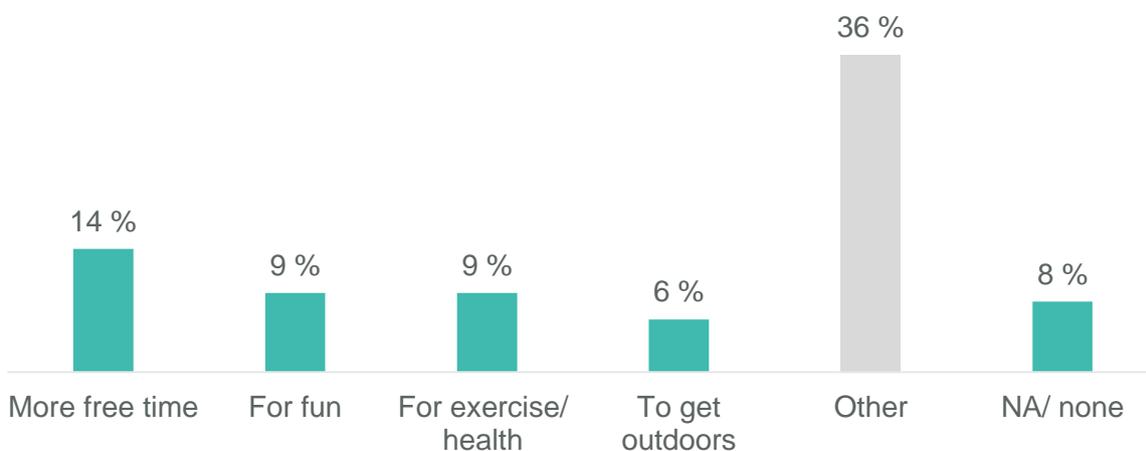
Unprompted reasons for taking part in activities less during the pandemic



Q10B. You mentioned you have spent less time doing the following activities since the start of the Covid pandemic: Why is this? Base: 322

Conversely more free time is a key reason (14%) respondents have been spending more time doing things since the start of the pandemic. This was followed by for fun and for exercise or health reasons, both 9%. For older respondents, health and exercise was a top incentive with this increasing to over a quarter (28%).

Unprompted reasons for taking part in activities more during the pandemic

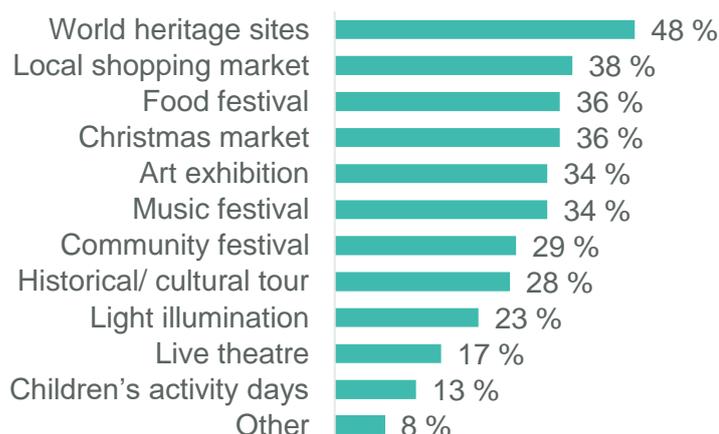


Q10C. You mentioned you have spent more time doing the following activities since the start of the Covid pandemic: Why is this? Base: 306

World heritage sites are the most popular cultural activities, with social media and word of mouth the most common ways people are hearing about activities

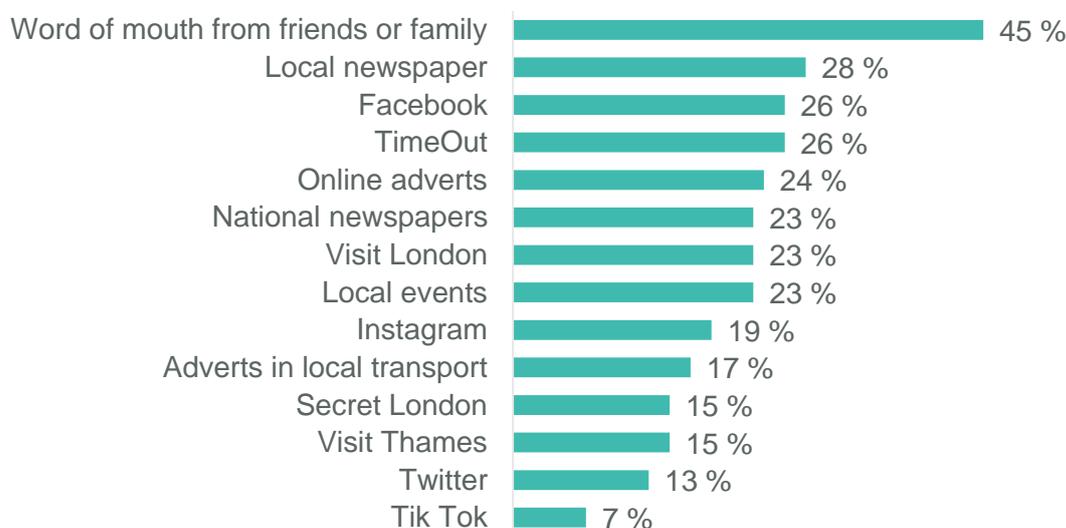
Overall 10% of respondents (137 respondents) had attended a cultural activity. Of those who have attended a cultural activity on or near the Thames, world heritage sites were the most common cultural activity people have visited, with nearly half (48%) having visited one in the past. After historical sites the next top responses were those related to food and shopping; local shopping markets (38%), food festivals (36%) and Christmas markets (36%).

Cultural activities ever attended



When it comes to where respondents are hearing about cultural activities, half (51%) cited at least one of the following London specific publications; TimeOut (26%), Visit London (23%), Visit Thames (15%) or Secret London (15%). While word of mouth is the single most common way people have heard of cultural activities at 45%. Social media as a whole had a similar influence at 44%, with Facebook being the most prominent (26%), followed by Instagram (19%), Twitter (13%) and then TikTok (7%).

Channels people have heard about cultural activities taking place on or near the Tidal Thames

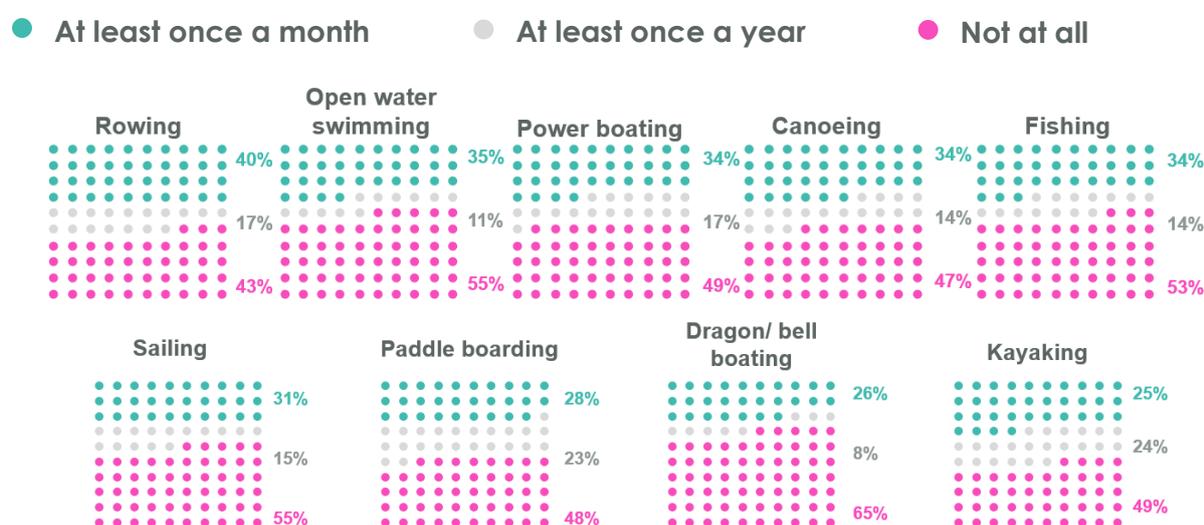


Q27. Where do you hear about cultural activities taking place on or near the River Thames? Base: 137

Rowing is the most popular sport, with open water swimming considered the main sport

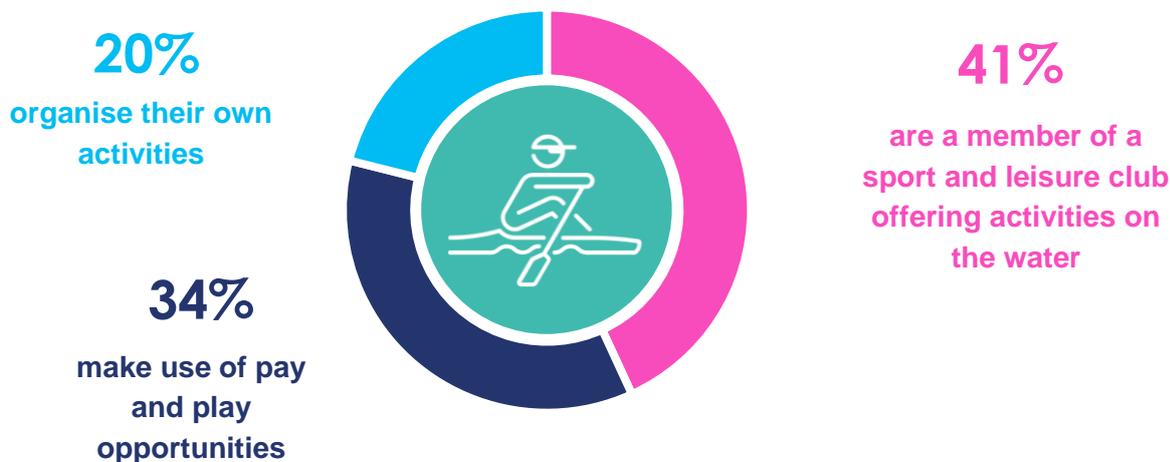
Only 7% of respondents said they had taken part in sport activities (95 respondents). Rowing is the leisure and physical activity that these respondents say they do at least once a month (40%). Despite this only 11% say it is their main sport. In comparison 20% say open water swimming is their main sport but just over a third (35%) are doing it once a month (at the Thames and inland waterways, including docks). Dragon/ bell boating was the sport that respondents were most likely to say they had never done before (65%).

Sporting activities taken part in



Most are organising activities at a recreational level through leisure clubs or pay and play

Over two fifths (43%) consider their main sport to be conducted at a recreational level, while a quarter say they participate at a club level (24%). Only 9% say that they participate at either at a national (5%) or international (3%) level. However, when it comes to how they organise their activities, two fifths (41%) say they are a member of a sport or leisure club, while just over a third (34%) say they make use of pay and play opportunities. The least common way of organising activities is for people to organise them themselves (20%). Recommendation by a friend or family member is the most common way people became involved in their main sport (31%), while 28% search for local activities and a quarter (24%) did it when they were younger.

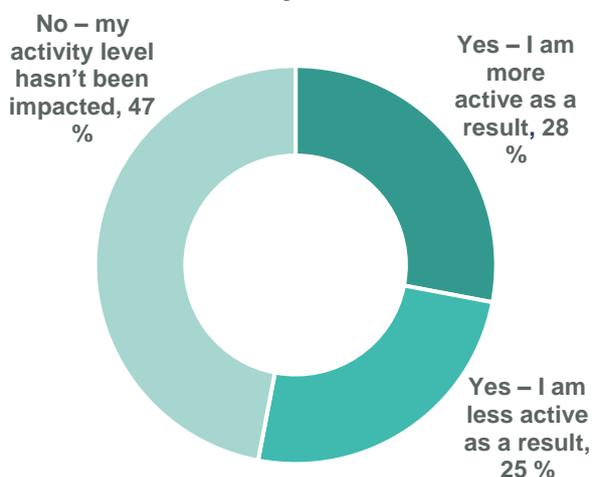


Q15: Are you a member of a sport and leisure club offering activities on the water? Base: 61

Upper Thames, Central Thames and the Docks are the most used areas of the river for recreation, all having been used by 27% of respondents that take part in sport or physical activities. Following this was Lakes/ Basins/ Reservoirs used by a quarter (24%) and Lower Thames and Estuary and Grand Union Canal both having been used by 20% of these respondents.

More respondents reported that their activity levels had increased (28%) than decreased (25%) as a result of Covid. While around half (47%) said their activity level hadn't been impacted. Men and young people were more likely to say their activity levels had increased (31% and 43% respectively). Those who live in authorities by the river in London are also more likely to say they have become more active (33%).

Impact of Covid on activity levels



Concern about health and safety was the top reason cited for decreases in physical activity during Covid-19 (43%), with three fifths (60%) of older respondents giving this reason. This was followed by people feeling less motivated (37%) and closure of facilities, clubs and spaces (36%). Closure of spaces was a particular issue for those who work in authorities by the river in London (41%).

Awareness and cost are the main barriers, with clean and modern facilities the greatest motivator

When speaking to respondents generally about leisure and physical activities lack of awareness (30%) and cost of participation (29%) are the main barriers to taking part in physical activities on the Tidal Thames and inland waterways. This was followed by family/ work commitments (25%) and

safety concerns (20%). For many of the barriers listed women are more likely to identify them as concerns than men were. Among women a third (both 33%) said lack of awareness and cost was an issue, while a quarter cited a general lack of motivation (23%). Lack of confidence in finding new activities was also a sticking point for a fifth (20%) of women.

For over three quarters (77%) of respondents said it was important to them that facilities are clean and modern for their motivation to take part in physical activity on the Tidal Thames or inland waterways. This was most prominent among women (80%) and older respondents (81%). While three thirds (66%) want variety of exercise to choose from and 63% want to meet and socialise with others. Only just over a third (36%) cited competition or winning as a motivator, but this increased to 40% of men and nearly half (48%) of 18-34 year olds.

Access to the river and barriers to participation

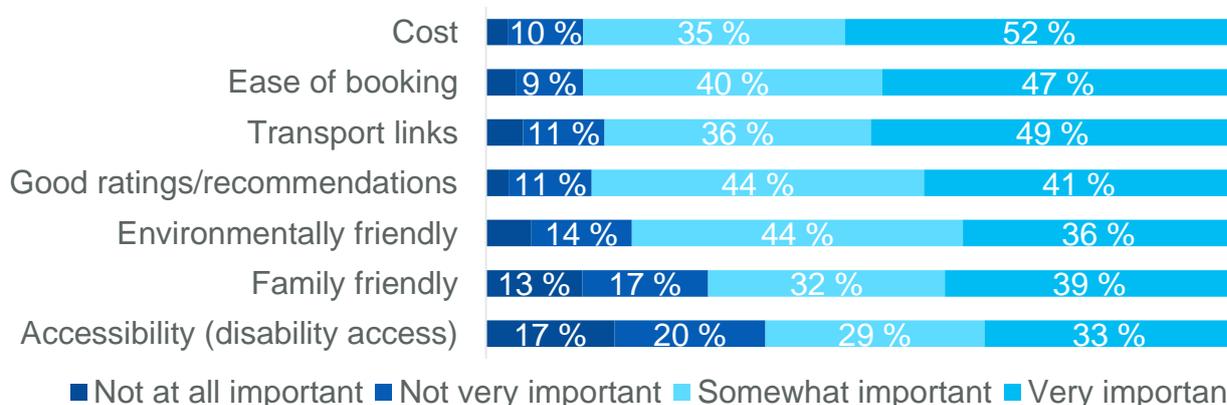
Cost and ease of booking are the most important factors when people are looking to take part in an activity

Nearly nine in ten people (87%) say the cost and ease of booking are important when taking part in activities.

While transport links are very important to almost a half of respondents (49%), this is less the case with those living by the river where nearly a fifth (18%) said that it was not important. Young people are particularly concerned with activities being accessible (65%).

Being family friendly obviously rises for those with children (80% for those with children under 18 vs 57% for those without children).

Importance of each elements of taking part in an activity on the Thames



Beside general lack of interest, time is the most common barrier to taking part in activities

A general lack of interest is the top reason for people not being interested in activities. Other barriers to participation include:

Traveling on the river

1. Cost of entry (19%)
2. Done before so don't need to (15%)
3. Finding the time (15%)

Sport activities

1. Fear of the water (14%)
2. Finding the time (12%)
3. Cost of entry (10%)

Cultural activities

1. The crowds (21%)
2. Finding the time (18%)
3. Hassle of travel (13%)

Using Thames Path

1. Finding the time (17%)
2. Hassle of travel (16%)
3. The crowds (12%)

Visiting a culture site

1. Cost of entry (19%)
2. Finding the time (19%)
3. The crowds (18%)

Mudlarking

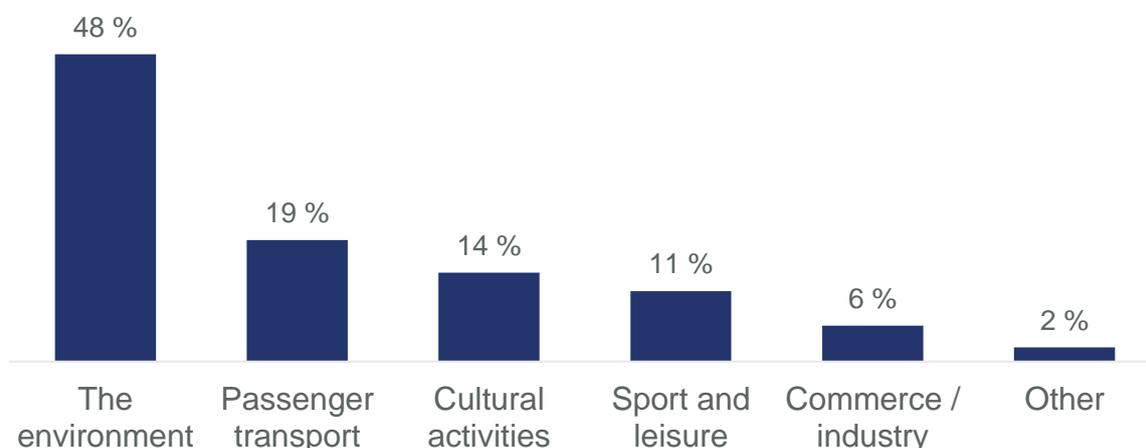
1. Finding the time (12%)
2. Hassle of travel (8%)
3. Cost of travel (6%)

The future

The environment is by far the most important priority for respondents

Half of respondents (48%) said the environment should be prioritised for the River Thames. This is followed by 19% who say passenger transport, 14% who say cultural activities and 11% who say sport and leisure. Only 6% say commerce and industry. Cultural activities and sport and leisure were more important among younger people aged 18 to 34, with 16% of 18 to 34-year olds saying each of these should be a priority. Men were also twice as likely as women to say sport and leisure (14% vs 7%).

What should be the priority for the Tidal Thames?



The Thames Path has the highest level of interest among physical activities asked about

Walking, running or cycling along the Thames Path is the physical activity that people would be most interested in taking part in, with 75% saying they would be interested. This rises to 80% of 18 to 34-year olds and declines to 69% of those aged 55 or over. Interest is also lower for those living in Kent and Essex (67% and 65% respectively). Interest also tends to be higher among higher social grades, with 78% of ABC1 being interested in the Thames Path compared to 66% of C2DE*. There is no difference by ethnicity.

Around a half of people would be interested in taking part in environmental activities (53%), sport activities (51%) and mudlarking (44%). As with interest in the Thames Path, interest rises among those who are 18-34. In particular, 70% of 18-34-year olds would be interested in sport activities.

*ABC1 is a grouping of working profession that helps to understand respondents cultural background. People who fall into the group ABC1 tend to be from a professional working background while C2DE tend to do manual work.

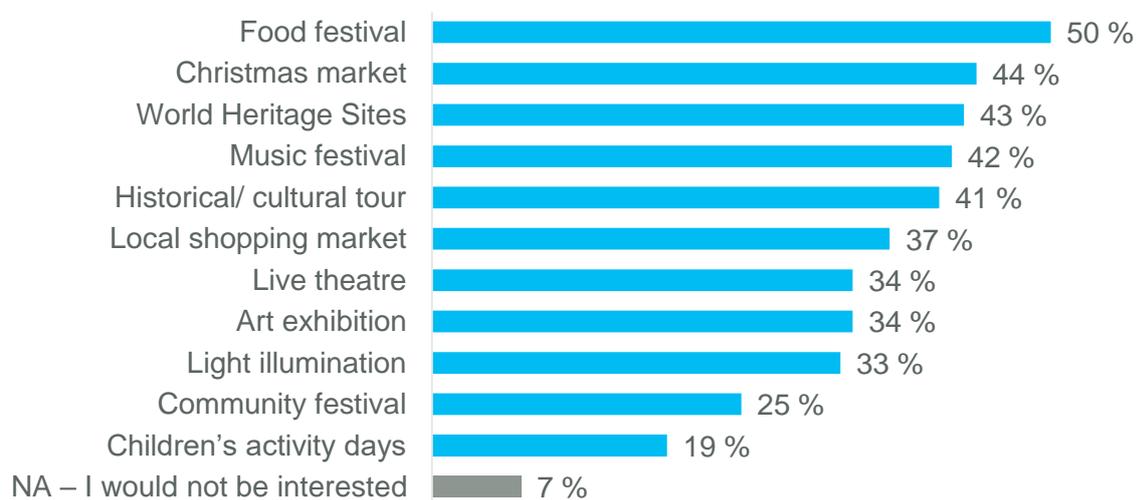
In term of culture, education and travel, respondents were most interested in visiting a culture or tourist site and travelling on the river

The vast majority of respondent would be interested in visiting a cultural or tourist site (79%), travelling on the river (76%) or attending a cultural activity (70%).

Around half (54%) would be interested in taking part in educational activities. This rises to 65% of those aged 18-35 and falls to only 38% of those aged 55+.

In terms of the types of cultural activities people would prefer, food is the most popular (50%), followed by Christmas markets (44%), world heritage sites (43%), music festivals (42%) and historic/cultural tours (41%). Women are more likely to be interested in any of these than men.

Activities most likely to be attended in the future



Overall interest in work opportunities on the Tidal Thames is low with around two fifths not at all interested

While less than three in ten (29%) people would be interested in working in Port Trade, this does rise among men (35%), those aged 18-34 year olds (45%) and those working full time (37%). It is obviously of little interest to those who are retired (5%). The same pattern is true for interest in training to work on the river (33% interest overall), working in passenger transport (32% interest overall) and working in freight transport (29% interest overall).

Fewer than half of respondents are interested in getting involved with policy and planning on the Tidal Thames, this does increase among higher earners

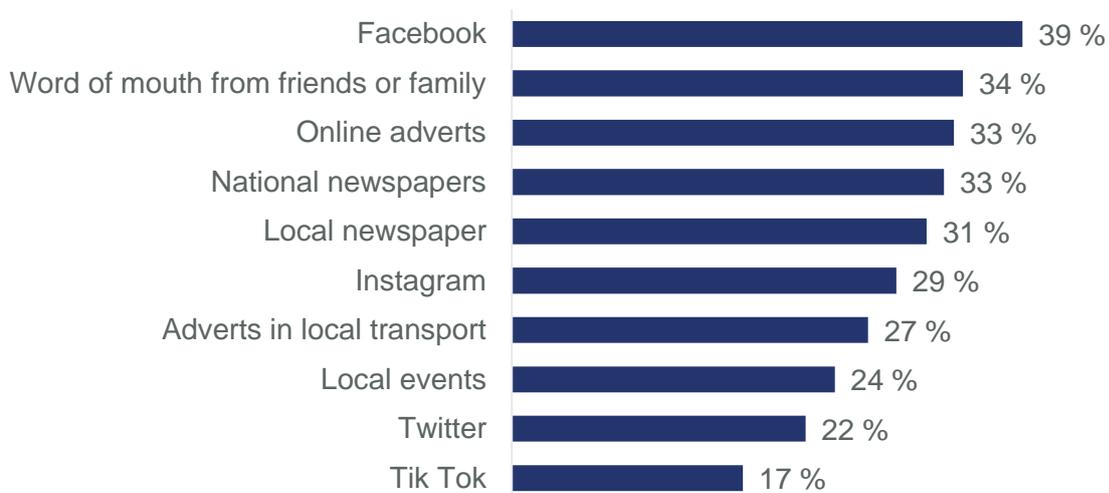
Four in ten (41%) respondents said they would be interested in taking part in a planning consultation for new riverside developments. This increases among richer respondents, to 50% of those earning £70,000-£100,000 and 61% of those earning more than £100,000, and is generally higher among higher social grades (45% of ABC1 vs 31% of C2DE). Younger people are also more likely to say they would be interested than older people (48% of 18-34s vs 29% of 55+).

Four in ten (43%) respondents said they would be interested in engaging with Net Zero initiatives. Again, this increases among richer respondents, to 56% of those earning £70,000-£100,000 and 65% of those earning more than £100,000, and is generally higher among higher social grades (47% of ABC1 vs 34% of C2DE). Younger people are also more likely to say they would be interested than older people (54% of 18-34s vs 25% of 55+).

Social Media is the top way people want to hear about things happening on the Tidal Thames, and even more so among younger people

People want to hear about activities on the Thames from social media (61%), word of mouth (34%) and online adverts (33%). As might be expected, there are differences by age, with 18 to 34 year olds more likely to say any form of social media (Instagram 46%, Facebook 44%, TikTok 34% and Twitter 31%) and older people more likely to say national local newspaper (both 43%) and word of mouth (42%).

Where people want to hear about things happening on the Tidal Thames



About Opinium

OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people **think, feel** and **do**. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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