



# Watersports and Leisure Participation Survey 2010



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## Foreword

When this Survey was conceived back in 2002, the principal aim was to create a long-lasting, affordable survey that would measure real trends in the marine and watersports sector. The prudent measures that we put in place at the outset have ensured the continuity of the project through the economic downturn, something we could never have anticipated back then.

Since those early days, we've seen the project grow from strength to strength, and this year we're delighted to welcome the British Canoe Union to the project. As the governing body of one of the largest sectors in the survey, the BCU is a welcome addition to the consortium that already consists of the British Marine Federation, the Maritime and Coastguard Agency, Royal National Lifeboat Institution and the Royal Yachting Association. Thanks are due to all the partners for their continued support of this important work, especially at a time when all spending is under such close scrutiny.

The headline results of this survey show a marked decline in "casual" participation which might be slightly alarming at first glance. This decline in "casuals" may well be explained by the recession, reduction in experience days, corporate boating and change in holiday patterns. However this has been countered by stable participation by more regular participants, in fact the number of sailing enthusiasts has increased from last year. Again, this may well be that people are using their boats more in these straitened times as opposed to taking holidays abroad and weekends away. The survey can't definitively explain behavioural patterns but it can highlight them so that we can react to what is happening in our market place.

I hope you find the report interesting and informative.

Paul Bayliss, RYA

## Key Findings

Commissioned by BMF, MCA, RNLI, RYA, and BCU

- 5.6% of those surveyed participated in at least one of the 12 boating activities\* in 2010 (compared to 7.2% in 2009 and 6.2% in 2008). This means that up to 2.9 million UK adults participate in these boating activities.
- All activities show a decline in participation. Four of them, although declining compared to last year, are not by a statistically significant amount; water skiing, wind surfing, motor boating/cruising and yacht racing.
- Casual participation has decreased for the sailing and non-powered watersports. Sailing has shown an increase in enthusiast participation.
- 'Occasional' and 'Enthusiast' participation remains relatively stable over the 9 year period.
- The gap between male and female participation rates for 'any boating activity' is declining due to the decrease in male participation rates. Males show higher participation rates in almost all of the activities. Canal boating is the only activity with similar levels of male and female participation.
- Participation rates have decreased across all age groups for 'any boating activity'. The one area of growth is in the younger age group for manual watersports.
- The socio-economic group AB has the highest participation rates across all 12 activities but in terms of volume of participants the C1 group has more volume for canoeing, using personal watercraft and motor boating/cruising. The C2DE has the greatest volume of participants for canal boating.
- There is an increase in the proportion of activity taking place in the UK. This is because of a decline in the number of overseas holidays by UK residents in 2010 compared to 2009.
- 2.37% of those surveyed report their household owns at least one boat or craft out of the 12 boating activities\*. Thus an estimated 1.1 million boats/craft are owned by UK households. On average, 6% are kept abroad.

\* The 12 boating activities making up "Any Boating Activity" includes Small sail boat racing, Small sail boat activities, Yacht racing, Yacht cruising, Power boating, Motor boating/Cruising, Using Personal Watercraft, Rowing, Canoeing, Canal boating, Water skiing and Windsurfing.

## Executive Summary

This is the ninth year of the Watersports Participation Survey but unlike recent years 2010 focuses on the core elements of participation, both in the UK and abroad, and boat ownership.

The survey contains the 12 original boating and watersports activities and none of the water based leisure activities that have been collected in recent years.

Participation in any of these 12 activities has declined by 1.6 percentage points since 2009 to 5.6%. This equates to up to 2,917,000 participants in "Any boating activity" in 2010. Compared to 2008 the decline is not so pronounced at 0.6 percentage points.

Water skiing, wind surfing, motor boating/cruising and yacht racing, although showing a decline in participation is not by a statistically significant amount so could be down to random fluctuations in the sample rather than specific factors affecting these sports.

The remaining 8 activities all showed a statistically significant decline in participation over the previous year. The grouped category of 'Small sail boat activities or yacht cruising' has been hardest hit with a decline of .55 percentage points over the previous year.

Although the headline declining figure looks depressing, the decline is linked to the 'casual' participant. The volume of 'occasional' and 'enthusiast' participants has remained stable over the years.

## Reasons for the Decline

While the news looks negative, there are economic factors affecting the market. The UK has faced tough economic conditions over the past couple of years. According to UKTS UK holidays by UK residents have declined in 2010 compared to 2009. 2009 was a peak year for domestic holidays (the 'staycation' effect of the recession) which may well account for the uplift in that year. The first 3 quarters of 2010 are 4% down on the same period in 2009. As some people would inevitably try a boating or watersport activity on a UK holiday it is likely that the reduction in UK holidays is having an effect on participation levels.

In addition, consumer research conducted by Arkenford looked at holiday taking and consumer confidence attitudes and reveals that holidays are important for UK consumers, but that during the tough economic conditions people are not confident about job security and they are looking to cut down on the cost of their holidays. This is likely to include a reduction in the activities they take part in while on holiday as well as the initial cost.

## Participation in UK vs. Abroad

A key element to examine is where people are participating in the boating and watersport activities.

The proportion of participation in the UK rather than abroad has increased amongst participants of most of the boating and watersport activities. 80% of those participating in 'Any boating activity' participated in the UK, the highest level seen since 2003.

With the exception of using personal watercraft, all activities have at least 64% of their participants participating in the UK and is as high as 97% for canal boating.

Data obtained from the International Passenger Survey (IPS) reveals that the number of UK residents taking an overseas holiday has declined in 2010 compared to 2009. Taking the first half of each year, 2010 is 11% down compared to 2009.

Participation abroad is at its lowest level amongst participants of 'Any boating activity'. 38% of participants for 'Any boating activity' participated abroad in 2010 down 5 percentage points from 2009.

Two activities; using personal watercraft and water skiing have over half of their participants participating abroad in 2010. These activities have always been popular abroad among their participants so the reduction in overseas holidays is obviously affecting these sports.

In fact, using personal water craft and power boating have more than a third of their participants only participating in the sport abroad and never in the UK (57% for using personal watercraft and 36% for power boating). Water skiing, motor boating/cruising and yacht cruising also have approximately a quarter of their participants only participating abroad.

Given the reduction in overseas holidays and activities that require little training, for example using personal watercraft, that are more likely to be done as part of a holiday, it is not unexpected to see some reduction in the participation levels for some of the activities.

## Frequency of participation

The majority of participants fall into the casual category, (which means they participate less than 5 times per year). In 2010 there has been a decline in the proportion of casual participants for sailing activities (down 6.4 percentage points) and an increase in the proportion of enthusiasts (up 6.8 percentage points), who participate more than 13 times per year.

This is a natural consequence of the reduction in participation as the more committed users are the ones that are likely to stay in each sport, while casual participation rises and falls according to circumstances.

## Demographics

Participation among males (7.3%) is almost twice the level it is for females (4.0%) in 'Any boating activity'. All activities with the exception of canal boating have a higher participation rate of males compared to females. Canal boating has the same participation rate for both males and females suggesting that it is something couples or families do together.

The trend analysis shows that male participation rates are in gradual decline over the last 9 years but the female rate remains relatively stable for 'Any boating activity'. Females are showing a trend of increased participation for canoeing and motor boating/cruising.

Among the age groups, all showed a decline in participation between 2009 and 2010 for 'Any boating activity'. Among the 16-34 age group all activities showed a decline in participation with the exception of yacht racing which remains the same as 2009.

Rowing/sculling and yacht racing have the same participation levels in 2009 as they do in 2010 among the 35-54 age group. All other activities show a decline in 2010 compared to 2009.



Small sail boat racing, motor boating/cruising, using personal watercraft and windsurfing all have the same or slightly better participation rates in 2010 among the over 55 age group compared to 2009, however participation is lower among the over 55 age group compared to the other age groups.

The trend for 'Any boating activity' shows a gradual increase in participation among the over 55 age group and relatively stable participation rate for the 35-54 age group.

The 16-34 age group is showing a long term declining trend in participation. In 2002 the participation level for 'Any boating activity' among the 16-34 age group was 6 percentage points higher than the participation level for the 35-54 age group. In 2010 the participation level for the two age groups is almost identical, which is down to the decline in 16-34 rather than an increase in the 35-54 age group. Among the 35-54 age group, canoeing is showing the most favourable long term growth in participation.

The AB socio-economic group has higher participation rates than the C1 group, who in turn have a higher rate than the C2DE group across all activities. When absolute numbers are taken into account the AB group has 1,034,000 participants, the C1 group has 986,000 and the C2DE group has 731,000 participants in 'Any boating activity'.

Participation rates are highest among residents of Northern Ireland and those living in regions along the south coast of England. Northern Ireland residents have particularly high levels of participation for canoeing and motor boating/cruising relative to other areas of the UK. Those living in southern areas of England are strong for sailing activities relative to other areas of the UK.

In 2010, 2.4% of households stated that they owned at least one boat (either in the UK or abroad). This is down by less than half a percentage point on the previous year. Taking the three year average from 2008 – 2010 to give more robust estimates of the penetration and volume of boat ownership reveals that 2.5% of UK households state they own a boat.

The most common boat type to be owned is a canoe/kayak, being one of the smallest and cheapest types of craft asked about.

Households in the South West have the highest proportion of boat owners (over the three year period) followed by the South East and Northern Ireland.

The vast majority of boats are kept in the UK. Of the craft kept overseas, the most common are; a personal watercraft, RIBs/Inflatables or sportsboats.

Taking a 3 year average, there are 1,067,000 boats owned of which 1,003,000 are kept in the UK. The most common category of boat to be owned is a motor/power boat followed by a manual craft. Sailing boats are the least common which could be down to the number of clubs that have their own boats.

# 1. Introduction

The purpose of the Watersports Participation Survey is to provide robust estimates of the level of participation in a range of boating and watersport activities across the United Kingdom.

The research has been continuously conducted by Arkenford since 2002. Surveys in 2002, 2003 and 2004 (jointly commissioned by the BMF (British Marine Federation), RYA (Royal Yachting Association) and Sunsail) had a sample of 6,000 UK residents and covered a list of 12 boating and watersport activities. In 2004 Arkenford also conducted independent research for the MCA (Maritime and Coastguard Agency) into participation in 20 leisure based watersport and coastal activities. From 2005 MCA and RNLi joined the consortium and sample sizes were pooled allowing the annual sample to grow to 12,000 and the list of activities to be extended to 21 water based activities. After the 2007 survey YBW.com became the new sponsor of this project. In 2010, YBW.com left the consortium and the British Canoe Union (BCU) joined. Due to the tough economic climate, the MCA decided to forego measuring the additional 9 leisure participation activities so the 2010 survey measures the original 12 boating and watersport activities only. Table 1 summarises those activities that were included in the survey each year since 2002.

Table 1 Summary of Activities

	Survey				
	BMF/RYA/ Sunsail	MCA	BMF/ MCA/ RNLi/ RYA/ Sunsail	BMF/ MCA/ RNLi/ RYA/ Ybw.com	BMF/ MCA/ RNLi/ RYA/ BCU
	2002-2004	2004	2005-2007	2008 to 2009	2010
Canoeing	✓	✓	✓	✓	✓
Water skiing	✓	✓	✓	✓	✓
Small sail boat activities	✓	✓	✓	✓	✓
Rowing/Sculling	✓	✓	✓	✓	✓
Windsurfing	✓	✓	✓	✓	✓
Using personal watercraft	✓	✓	✓	✓	✓
Motor boating/Cruising	✓	✓	✓	✓	✓
Yacht cruising	✓	✓	✓	✓	✓
Power boating	✓	✓	✓	✓	✓
Small sail boat racing	✓	✓	✓	✓	✓
Canal boating	✓	-	✓	✓	✓
Yacht racing	✓	✓	✓	✓	✓
Surfboarding	-	✓	✓	✓	-
Kitesurfing	-	✓	✓	✓	-
Angling (from a boat)	-	✓	✓	✓	-
Angling (from the shore)	-	✓	✓	✓	-
Cliff climbing	-	✓	✓	✓	-
Coastal walking	-	✓	✓	✓	-
Outdoor swimming	-	✓	✓	✓	-
Leisure sub-aqua diving (from the shore and boat)	-	✓	✓	✓	-
Spending general leisure time at the beach	-	✓	✓	✓	-

The 2010 results enable us to give an insight into trends by activity over a 9 year period for the 12 'Any boating activities'. Trends for the additional 9 activities first surveyed for the MCA in 2004 ran until 2009.

The data on which the analysis has been based comes from a nationally representative sample of around 12,000 respondents across the United Kingdom (England, Scotland, Wales and Northern Ireland). The surveys prior to 2005 had a sample of 6,000 and only covered Great Britain (England, Scotland and Wales), as there was no omnibus survey facility in place

covering Northern Ireland. The weighted sample provides information representative of the UK population in terms of age, gender, socio-economic grouping and origin.

## The Questions

Each respondent is asked if they have taken part in each of the 12 boating and watersport activities over the 12 months preceding September when the survey is conducted. As far as possible the descriptions of each activity are provided in layman's terms to allow all respondents, whatever their level of expertise, to give accurate replies. Additional explanation is provided when requested by the respondent, for example:

Small sail boat racing/ activities has the following explanation:

*"Dinghies are small open sailing boats (not including seaside inflatables and beach toys) which tend to be brought ashore after use whereas Yachts are usually left in the water"*

Power boating, motor boating/ cruising and canal boating has the following explanation:

*"Power boating is defined as craft that plane over water whilst motor boating / cruising is defined as river boating or coastal motor cruising"*

(see Appendix 1 for the questionnaire and more definitions).

For those activities which respondents have taken part in within the last 12 months, they are asked how often they participated. The question is split into two parts covering:

- Participation in the UK
- Participation abroad

These three questions form the core of the original 2002 questionnaire.

In 2007 a new question was added to the survey which looked into boat ownership. In 2008 and 2009 these questions were included again and refined to find out about boat ownership overall as well as boats kept in the UK. The questions regarding boat ownership are asked of the respondent in reference to the whole household.

## The Data

A brief overview of how to interpret the tables is given with Table 2. Each section of the report is supported by interpretation of the data. Information written in blue boxes relates to the figures reported in the survey and information in the red boxes, as in this one, relate to general information about the survey. All figures from 2005 onwards include participants in Northern Ireland.

When assessing the contents of this report it must be remembered that only a small number of people from the surveyed sample take part in some of the measured activities. Small base sizes for these activities mean that small fluctuations in numbers have a sizeable effect on the weighted data that is reported. Activities where the base sizes are very small and therefore the results should be taken as indicative only have been marked with a '\*'.

## 2. Participation in Surveyed Leisure Activities 2010

Table 2 Boating and Watersport Participation 2010 of UK Respondents

	Participation rate 2010					Number of participants 2010 (including Northern Ireland)		
	% for 2010	Min		Max		Number of participants for 2010	Min 90% Max 90%	
		95%	90%	90%	95%		Number of participants	Number of participants
Any boating activity	5.61%	5.21%	5.27%	5.95%	6.01%	2,751,941	2,587,000	2,917,000
Small sailboat activities or yacht cruising	1.22%	1.03%	1.06%	1.38%	1.41%	598,290	520,000	677,000
Small sailboat racing or yacht racing	0.28%	0.19%	0.21%	0.36%	0.38%	138,808	101,000	177,000
Motor boating / cruising or canal boating	1.31%	1.11%	1.15%	1.48%	1.51%	644,144	562,000	726,000
Canoeing	2.15%	1.90%	1.94%	2.37%	2.41%	1,056,127	952,000	1,160,000
Water skiing	0.56%	0.43%	0.45%	0.66%	0.69%	272,305	219,000	326,000
Small sail boat activities	0.81%	0.65%	0.68%	0.94%	0.97%	396,772	332,000	461,000
Rowing/Sculling	0.36%	0.25%	0.27%	0.45%	0.46%	176,348	133,000	219,000
Windsurfing	0.48%	0.36%	0.38%	0.58%	0.60%	233,586	184,000	283,000
Using personal watercraft	0.35%	0.24%	0.26%	0.43%	0.45%	170,272	128,000	212,000
Motor boating/Cruising	0.92%	0.75%	0.78%	1.05%	1.08%	449,034	381,000	517,000
Yacht cruising	0.52%	0.39%	0.41%	0.62%	0.64%	254,219	203,000	306,000
Power boating	0.51%	0.39%	0.41%	0.62%	0.64%	250,945	200,000	302,000
Small sail boat racing	0.17%	0.10%	0.11%	0.23%	0.24%	83,328	54,000	113,000
Canal boating	0.42%	0.30%	0.32%	0.51%	0.53%	203,682	158,000	250,000
Yacht racing	0.14%	0.08%	0.09%	0.20%	0.21%	70,921	44,000	98,000
Base	12,562					49,051,000	49,051,000	49,051,000

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)



The first column of Table 2 titled '% for 2010' is our best estimate of participation rates for each activity in 2010. We show the best estimate of actual participation in any of the original 12 boating and watersport activities (5.61% labelled 'Any boating activity'). However, it should be borne in mind that any estimate based on a sample of the population is only accurate within the statistical confidence interval outlined above.



The next four columns give an indication of our lower and upper estimates of participation within different levels of confidence. For example, we are 90% confident, that the participation rate for Yacht racing lies between 0.09% and 0.20% of the UK adult population in 2010.



In the next column we convert the participation rate for 2010 into an estimate of likely numbers of participants in each activity. These are based on a total population 16+ of 49,051,000 in the UK. In the next 2 columns we show the participant numbers at the 90% confidence interval. E.g. we are 90% confident that the number of participants in 'Any boating activity' lies between 2,587,000 and 2,917,000 people.

NB The population numbers prior to 2005 did not include Northern Ireland and this should be taken into account when making comparisons with earlier numbers.

Table 3 compares the participation rates as established in the 2010 survey with 2009 participation rates for comparison.

In interpreting the figures it is important to consider whether they reflect a real change in participation or a random fluctuation measurement<sup>1</sup>. As the degree of change increases, the likelihood that it is caused by random variation declines and it is increasingly likely to reflect a real change. The figures in the column 'Significance Measure' indicate how likely it is that the observed change is real. The figures are highlighted in red if the change is great enough to make us more than 90% confident that it is a real change. The 90% confidence level indicates that in less than 1 in 10 cases is a change of this magnitude likely to be the result of a random fluctuation.

- All surveyed boating and watersport activities have declined in participation levels in 2010 compared to 2009
- Three quarters of the activities show a statistically significant decline since last year
- Motor boating/cruising is the most stable of the activities with less than half a percentage point drop
- The decline for the following four activities is not statistically significant so could be down to random fluctuations in the sample; water skiing, windsurfing, motor boating/cruising, yacht racing
- The largest single decline from 2009 is for power boating which appears to have had a temporary uplift last year only.

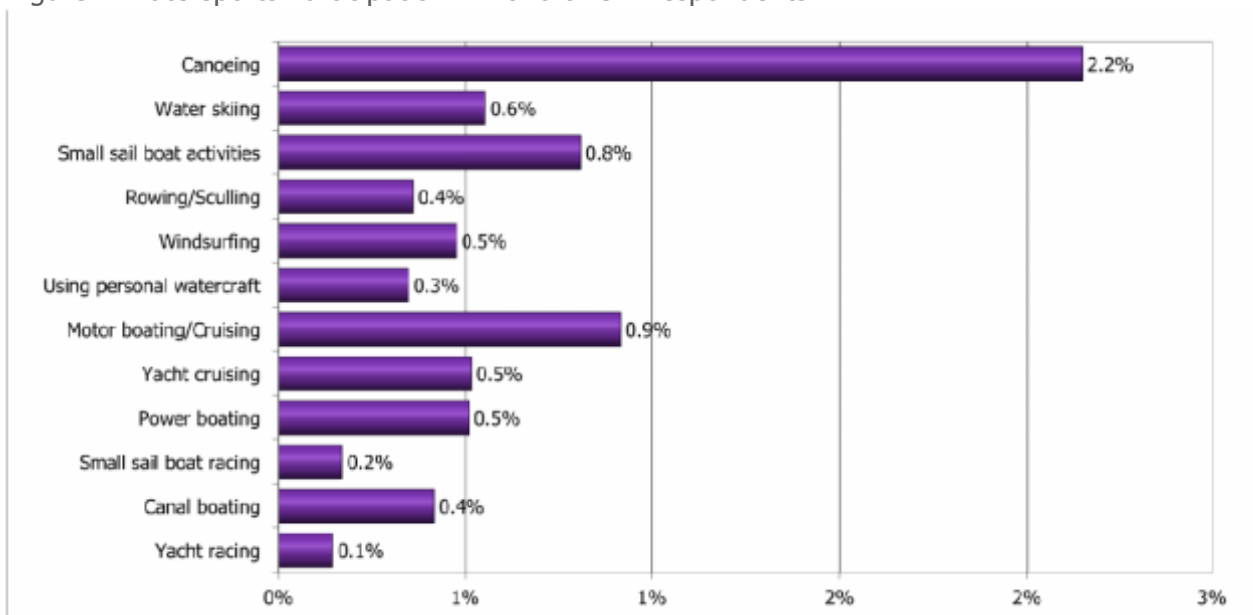
Table 3 Difference in Participation Rates 2010-2009

	Participation rate 2010	Participation rate 2009	Change (percentage points)	Significance
Any boating activity	5.61%	7.21%	-1.60%	<b>100.0%</b>
Small sailboat activities or yacht cruising	1.22%	1.77%	-0.55%	<b>100.0%</b>
Small sailboat racing or yacht racing	0.28%	0.44%	-0.16%	<b>96.7%</b>
Motor boating / cruising or canal boating	1.31%	1.60%	-0.28%	<b>94.1%</b>
Canoeing	2.15%	2.57%	-0.42%	<b>97.2%</b>
Water skiing	0.56%	0.64%	-0.09%	63.2%
Small sail boat activities	0.81%	1.13%	-0.32%	<b>99.1%</b>
Rowing/Sculling	0.36%	0.71%	-0.35%	<b>100.0%</b>
Windsurfing	0.48%	0.54%	-0.06%	51.2%
Using personal watercraft	0.35%	0.69%	-0.34%	<b>100.0%</b>
Motor boating/Cruising	0.92%	0.96%	-0.05%	30.3%
Yacht cruising	0.52%	0.78%	-0.26%	<b>99.1%</b>
Power boating	0.51%	1.16%	-0.65%	<b>100.0%</b>
Small sail boat racing	0.17%	0.30%	-0.13%	<b>96.8%</b>
Canal boating	0.42%	0.65%	-0.24%	<b>99.0%</b>
Yacht racing	0.14%	0.20%	-0.06%	72.6%
Base	12,562	12,683		

Source Watersports and Leisure Omnibus Surveys 2010 and 2009 (Base: all respondents – 12,562 and 12,683 adults aged 16+)

<sup>1</sup> For example in 2009 we estimated Water skiing participation at 0.64%, in 2010 we have estimated it at 0.56%. This is a decrease of 0.09 percentage points. This decrease is significant only at a confidence level of 63.2%. It is usual to only consider changes above the 90% confidence level as statistically significant therefore this decrease is interpreted as likely to be a result of random data fluctuation rather than a real change in the participation rate.

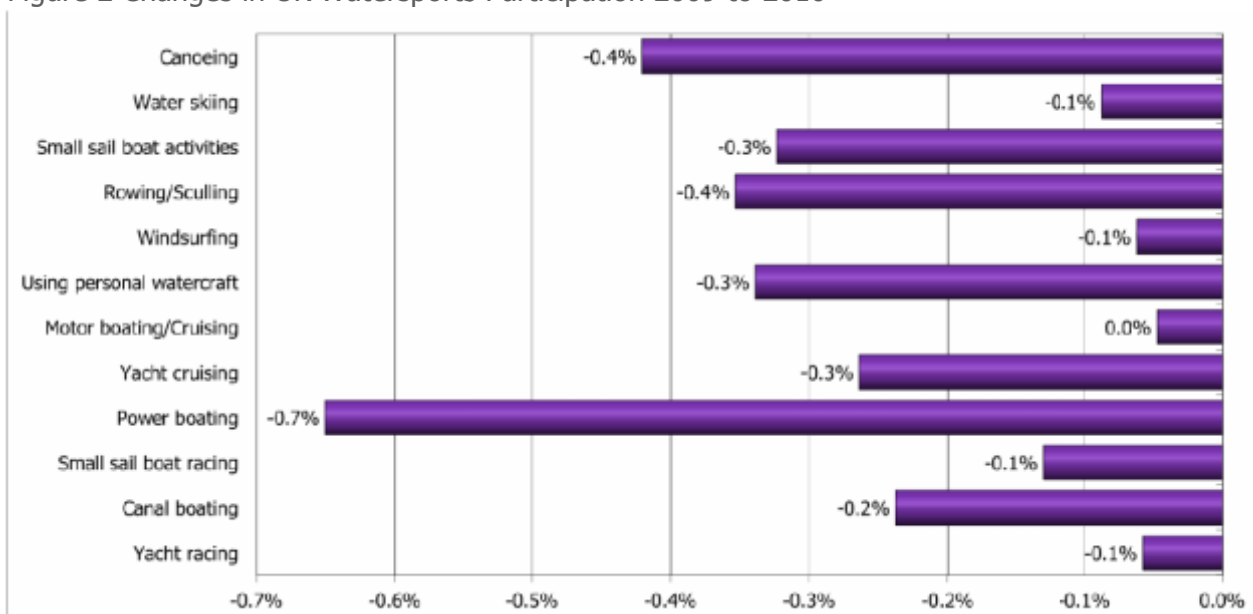
Figure 1 Watersports Participation in 2010 of UK Respondents



Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Figure 2 shows the change in participation rate for the activities from 2009 to 2010.

Figure 2 Changes in UK Watersports Participation 2009 to 2010



Source Watersports Omnibus Surveys 2010 and 2009 (Base: all respondents – 12,562 and 12,683 adults aged 16+)

- Eight of the 12 activities have declined in participation levels by a statistically significant amount.
- Activities not showing a statistically significant decline are:
  - Motor boating/ cruising (0.05 percentage point decrease)
  - Yacht racing (0.06 percentage point decrease)
  - Windsurfing (0.06 percentage point decrease)
  - Water skiing (0.09 percentage point decrease)
- The decrease is less than half a percentage point for all activities with the exception of power boating which is showing a 0.65 percentage point decrease.

- In Table 4 we show the participation rate in activities of particular interest to the RYA, which have been combined into one variable. These are the 12 'Any boating activities' bar rowing, water skiing and canoeing.

Table 4 Participation in RYA Interests 2010

	2009	2010
Participation Rate (min and max 90%)	4.82% (4.51% - 5.14%)	3.36% (3.09% - 3.62%)
Number of participants (min and max 90%)	2210720 - 2519880	1515780 - 1775630
Base	12,637	12,562
Total Population	49,051,000	49,051,000

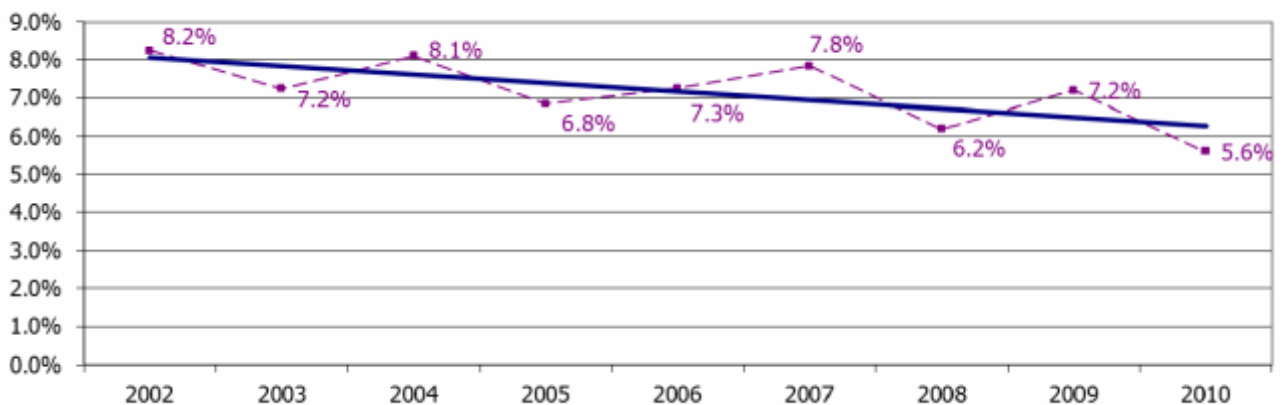
Source Watersports Omnibus Surveys 2010 and 2009 (Base: all respondents – 12,562 and 12,683 adults aged 16+)

## Overall trends in participation

With each year we track participation we can be increasingly confident about the general levels of participation in each activity and can perceive long term trends within the data. Figure 3 shows a linear trend line for 'Any boating activity' from 2002 to 2010 (blue line) and the actual rises and falls in participation (purple dotted line).

- Regression line shows a declining trend in participation
- Lowest level of participation since 2002
- This drop comes after 2 years of tough economic conditions in the UK, however the trend suggests a consistent long term decline in participation

Figure 3 Overall Trends in Participation for Any Boating Activity 2002 – 2010



Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## Trends in Activities

The following charts give insight into the participation trends for activities grouped in three categories:

- **sailing sports** - small sail boat racing, other small sail boat activities, yacht racing, yacht cruising and windsurfing
- **power sports** - power boating, general motor boating, canal boating, and using personal watercraft
- **manual sports** - canoeing, rowing and water-skiing

### Sailing Sports

- Yacht racing, due to the low levels of participation, remains relatively stable throughout the years
- After the drop in participation levels in 2005 small sail boat racing has been below 0.5% participation
- Small sail boat activities have been fluctuating above and below the 1% line over the past 4 years
- Windsurfing has declined between 2002 and 2005 but has remained stable since 2005
- Yacht cruising has been on a downward trend over the past couple of years

### Power Sports

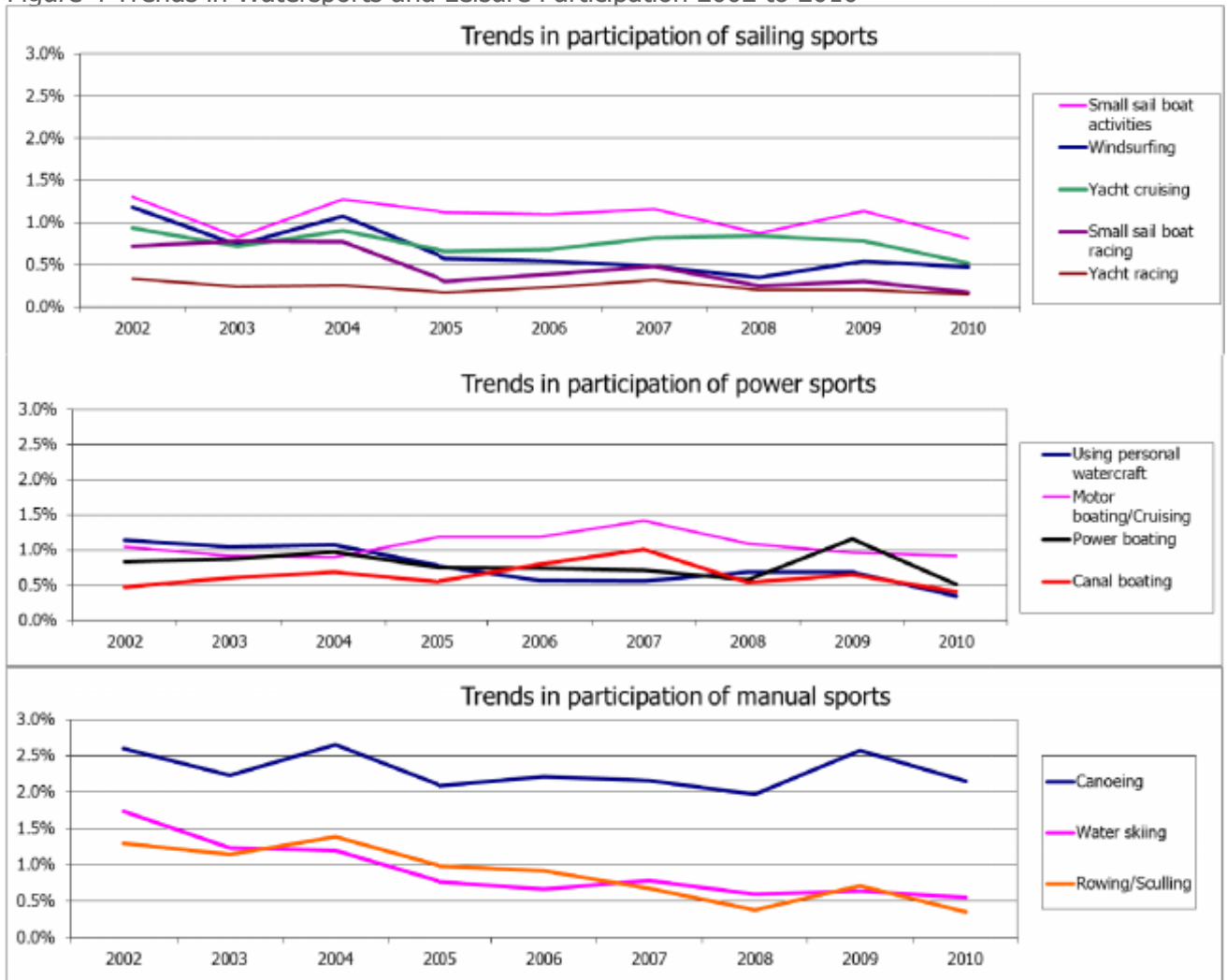
- Last year's growth in power boating looks temporary as participation has returned to 2008 levels
- Motor boat cruising and canal boating are at levels similar to 2002 after a peak in 2007
- Canal boating has reached its lowest participation level since 2002
- Using personal watercraft, after a slight resurgence in 2008 and 2009 has declined to its lowest participation level

### Manual Sports

- Water skiing and rowing/sculling continue a downward trend
- Canoeing remains relatively stable, consistently showing participation above 2%



Figure 4 Trends in Watersports and Leisure Participation 2002 to 2010



Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Best fit trends for individual activities can be found in Appendix 2.

### 3. Frequency of Participation

Each participant in an activity was asked how often they had participated over the last 12 months both in the UK and abroad.

The average participation is estimated from this data. For the frequency of participation categories below, mean values are used to calculate the average participation (1 for once, 3.5 for 2-5, 9 for 6-12 and 19 for 13-25, 25 for 25+).

Some of the individual boating activities have very small sample sizes and these are marked with an asterisk. Any results shown with an asterisk should be treated with caution and used as a guide only.

- Three quarters of participation is casual regardless of the activity type.
- This year sees a higher proportion of enthusiasts in the sailing category compared to 'occasionals'. This is a result of fewer casual sailors in 2010.
- The fewer casual sailors is likely a result of fewer holidays taking place in 2010 compared

to 2009. Given that many people will have an introduction to a sailing sport when on holiday in the UK or abroad then the reduction in holidays and cost cutting while on holiday will result in fewer people trying it out.

Table 5 Level of Participation (percentages)

	Casual (1-5 times a year)	Occasional (6-12 times a year)	Enthusiast (13+ times a year)	Unweighted Base
Any boating activity	73.9%	11.6%	14.5%	613
Sailing	69.9%	12.9%	17.3%	189
Motor/power boating	79.3%	6.6%	14.1%	201
Other water sports	74.9%	12.9%	12.2%	332

Source: Watersports Omnibus Survey 2010 (Base: all participants in the watersports aged 16+)

Table 6 Level of Participation (participants)

	Casual (1-5 times a year)	Occasional (6-12 times a year)	Enthusiast (13+ times a year)	Unweighted Base
Any boating activity	2,033,793	318,403	399,744	613
Sailing	591,609	109,072	146,208	189
Motor/power boating	676,512	56,413	120,702	201
Other water sports	1,149,885	197,948	187,566	332

Source: Watersports Omnibus Survey 2010 (Base: all participants in the watersports aged 16+)

Table 7 Difference in Level of Participation 2010 vs. 2009

	Casual (1-5 times a year)	Occasional (6-12 times a year)	Enthusiast (13+ times a year)
Any boating activity	-2.0%	0.7%	1.3%
Sailing	-6.4%	-0.3%	6.8%
Motor/power boating	0.2%	-2.4%	2.3%
Other water sports	-2.5%	3.4%	-0.9%

Source: Watersports Omnibus Survey 2010 (Base: all participants in the watersports aged 16+)

The following charts provide proportion estimates over the past 8 years for individuals based on their frequency of participation.

It should be noted that sample sizes are low for people outside of the 'casual' category so results should be treated with caution.

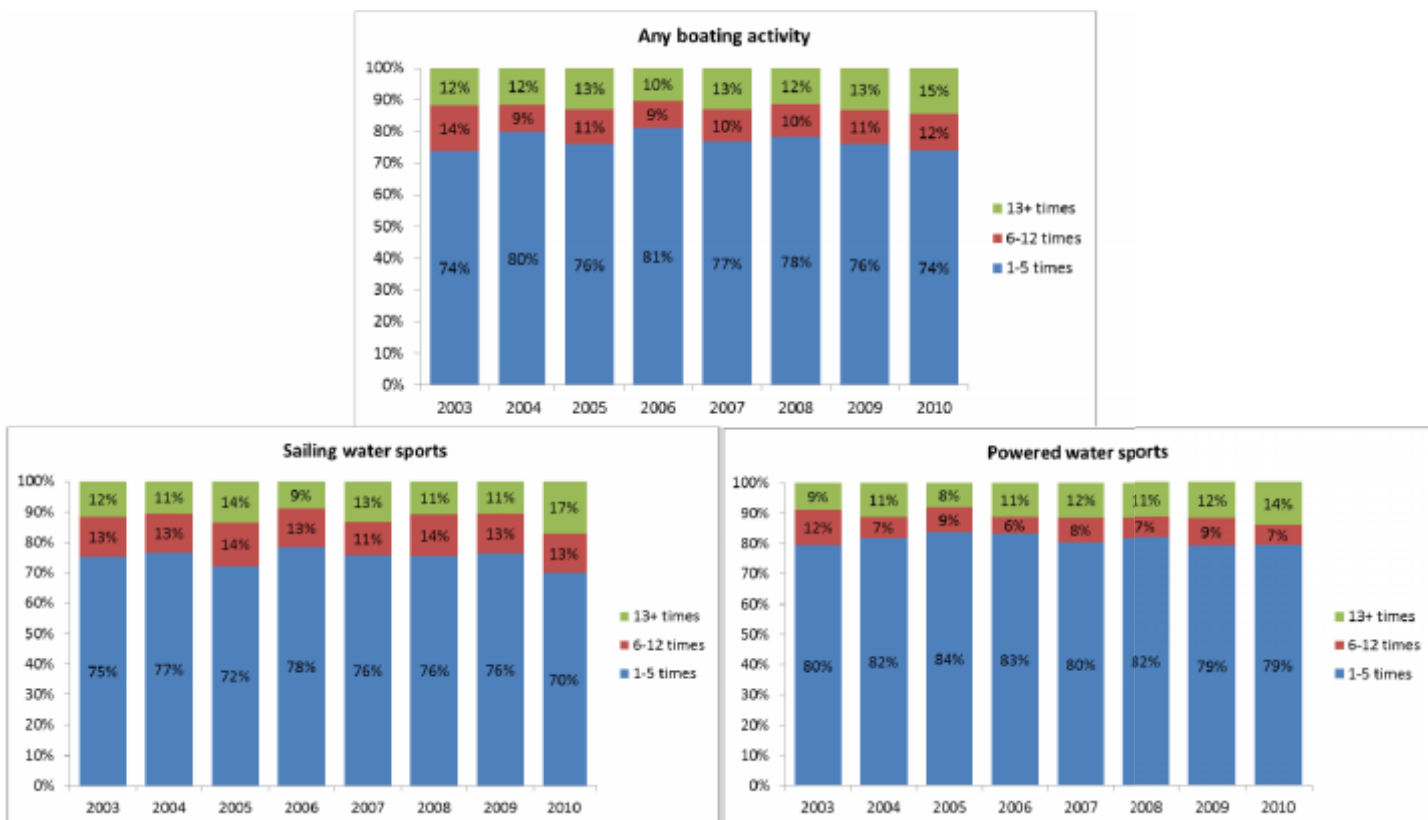
Table 8 Sample sizes for frequency of participation

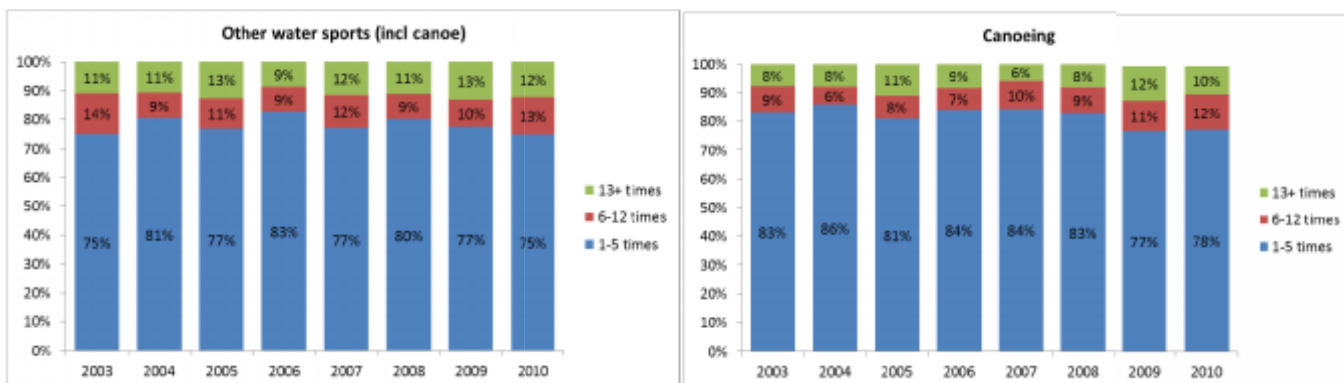
	Any boating activity			Sailing water sports			Powered water sports			Other water sports (incl canoe)			Canoeing		
	1-5 times	6-12 times	13+ times	1-5 times	6-12 times	13+ times	1-5 times	6-12 times	13+ times	1-5 times	6-12 times	13+ times	1-5 times	6-12 times	13+ times
2010	453	71	89	131	23	35	156	14	31	248	43	41	175	28	23
2009	597	86	104	197	36	30	236	27	34	326	41	53	210	30	29
2008	531	71	78	168	31	25	194	15	27	283	30	38	177	18	16
2007	652	87	110	215	31	37	269	25	35	301	43	45	191	22	14
2006	657	69	84	212	31	24	244	17	33	355	37	38	206	17	21
2005	539	79	93	167	36	32	206	20	19	305	44	51	169	17	23
2004	305	32	44	123	20	18	90	6	13	179	20	25	100	7	10
2003	268	52	44	104	17	17	87	13	10	164	32	23	96	11	9

Source: Watersports Omnibus Survey 2003 - 2010 (Base: all participants in the watersports aged 16+)

- Trends over time show that participation is mostly casual across the 8 year period
- Motorised or powered watersports have historically been the most casual in terms of participation.
- The volume of 'occasionals' or 'enthusiasts' remain relatively stable for the three broad water sport categories.
- It is the casual participant that is in general decline in terms of their volumes.
- For canoeing/kayaking the volume of people taking part more than 6 times per year has increased since 2008, from a stable base over the previous six year period.

Figure 5 Proportion of participants by frequency of participation





Source: Watersports Omnibus Survey 2003 - 2010 (Base: all participants in the watersports aged 16+)

Table 9 Volume of participation (000's) by frequency

	Any boating activity			Sailing water sports			Powered water			Other water sports			Canoeing		
	1-5 times	6-12 times	13+ times	1-5 times	6-12 times	13+ times	1-5 times	6-12 times	13+ times	1-5 times	6-12 times	13+ times	1-5 times	6-12 times	13+ times
2010	2,034	318	400	592	109	146	677	56	121	1,150	198	188	819	131	105
2009	2,677	386	466	884	153	122	1,026	117	154	1,511	185	255	972	134	152
2008	2,375	315	350	772	137	111	824	66	114	1,298	144	179	803	89	78
2007	2,919	387	495	973	141	171	1,140	116	163	1,392	209	207	882	101	62
2006	2,832	295	363	921	149	106	1,039	68	140	1,550	164	161	897	79	90
2005	2,397	349	413	759	151	142	905	92	85	1,387	193	226	779	76	107
2004	2,918	309	424	1,171	197	161	842	69	116	1,805	197	239	1,006	72	95
2003	2,302	442	376	888	152	140	747	109	84	1,438	270	207	816	90	76

Source: Watersports Omnibus Survey 2003 - 2010 (Base: all participants in the watersports aged 16+)

- The more frequent participants of water sports tend to be dominated by males.
- There is an underlying trend of a decrease in the proportion of the 16-34 age group taking part across all frequencies.
- In the manual sport category it is predominantly the youngest age group that tries it and due to the physical nature of many of the sports, the enthusiasts also end up being in the younger age group

- Naturally the most committed conduct their activities in the UK
- Although participation levels have declined, sailing sports and powered sports are showing the highest proportion of committed participants in 2010 since the survey began
- Other watersports are at the second highest level for committed participants
- The reduction in holidays abroad and people cutting costs on holiday means that there are higher proportions of casual participants abroad across all three categories

Table 10 Level of participation UK vs. Abroad 2003-2010

		2003	2004	2005	2006	2007	2008	2009	2010
Sailing UK	1-5 times	74.6%	75.2%	68.8%	77.9%	74.4%	69.2%	71.5%	66.1%
	6-12 times	13.0%	12.2%	16.1%	13.4%	12.0%	18.4%	17.3%	15.5%
	13+ times	12.4%	12.6%	15.1%	8.7%	13.6%	12.4%	11.2%	18.4%
	Sample	111	124	191	222	230	176	206	156
Sailing Abroad	1-5 times	84.3%	91.8%	87.9%	87.0%	83.8%	95.4%	88.4%	89.5%
	6-12 times	9.4%	6.6%	5.7%	9.0%	9.7%	3.4%	6.4%	7.3%
	13+ times	6.2%	1.6%	6.4%	4.0%	6.5%	1.2%	5.2%	3.2%
	Sample	69	82	107	111	111	100	127	73
Motor/Power UK	1-5 times	76.8%	81.2%	82.7%	82.2%	79.5%	79.5%	76.3%	75.7%
	6-12 times	12.4%	6.6%	8.9%	6.6%	8.9%	8.2%	9.9%	8.3%
	13+ times	10.9%	12.2%	8.4%	11.2%	11.5%	12.3%	13.7%	16.0%
	Sample	93	93	192	237	254	190	229	159
Motor/Power Abroad	1-5 times	92.5%	92.2%	89.6%	85.7%	85.0%	90.9%	91.5%	92.9%
	6-12 times	4.3%	3.2%	7.6%	6.4%	11.4%	3.4%	4.1%	2.9%
	13+ times	3.2%	4.6%	2.7%	8.0%	3.6%	5.7%	4.4%	4.2%
	Sample	35	42	97	99	126	85	112	64
Other watersports UK	1-5 times	77.2%	78.9%	76.7%	80.8%	78.1%	76.9%	76.0%	70.4%
	6-12 times	9.5%	9.2%	10.3%	10.4%	9.4%	12.6%	9.6%	15.4%
	13+ times	13.3%	11.9%	13.0%	8.8%	12.5%	10.5%	14.4%	14.2%
	Sample	176	164	327	339	286	274	327	254
Other watersports Abroad	1-5 times	81.6%	89.0%	82.4%	90.4%	79.8%	88.6%	84.8%	89.7%
	6-12 times	12.7%	6.0%	9.9%	6.8%	11.7%	5.2%	9.5%	4.1%
	13+ times	5.7%	5.0%	7.7%	2.8%	8.5%	6.2%	5.6%	6.2%
	Sample	128	99	167	165	184	155	173	137

Source: Watersports Omnibus Survey 2003-2010 (Base: all respondents who participate in the respective activities)

- For most activities many more events take place in the UK compared to abroad.
- Canal boating continues to be the activity that people are least likely to do abroad.
- Windsurfing and water skiing have a higher proportion of participants undertaking the activity abroad compared to the UK.
- The majority of activities undertaken in the UK are on a casual basis, i.e. less than 5 times per year.
- Yacht racing is undertaken at least 6 times per year by those participating in the UK.

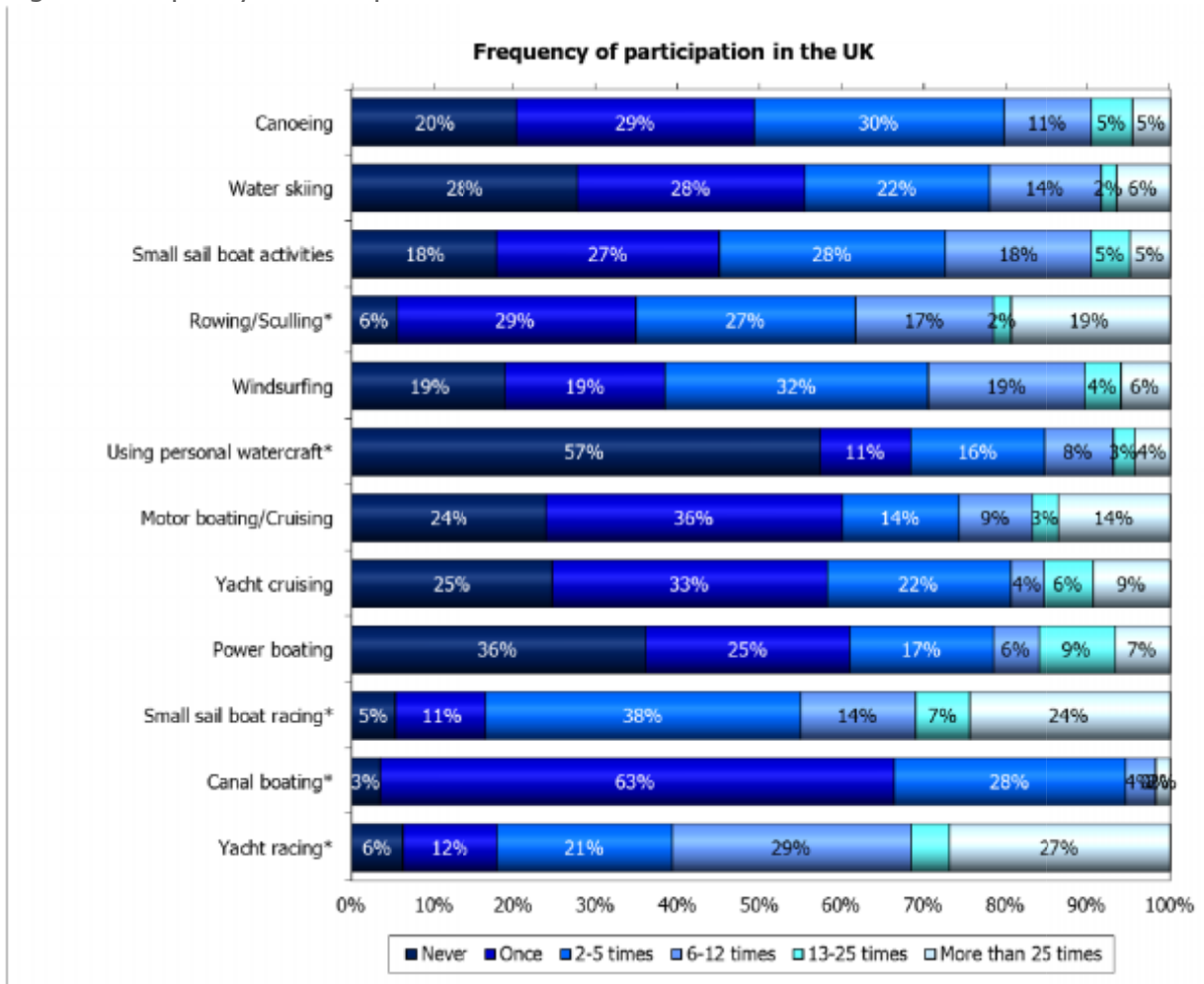
Table 11 Frequency of Participation in the UK

	Frequency of participation						Base
	Never	Once	2-5 times	6-12 times	13-25 times	More than 25 times	
Canoeing	20.3%	29.0%	30.4%	10.7%	5.0%	4.6%	226
Water skiing	27.8%	27.7%	22.4%	13.7%	1.9%	6.5%	59
Small sail boat activities	17.9%	27.2%	27.5%	17.9%	4.7%	4.9%	88
Rowing/Sculling*	5.5%	29.4%	26.7%	16.8%	2.2%	19.4%	38*
Windsurfing	19.0%	19.4%	32.0%	19.2%	4.4%	6.0%	50*
Using personal watercraft*	57.3%	11.0%	16.3%	8.5%	2.6%	4.3%	38*
Motor boating/Cruising	23.9%	36.1%	14.2%	9.0%	3.3%	13.5%	107
Yacht cruising	24.7%	33.5%	22.3%	4.1%	6.0%	9.4%	59
Power boating	36.1%	24.8%	17.5%	5.6%	9.4%	6.7%	58
Small sail boat racing*	5.3%	11.3%	38.3%	14.0%	6.6%	24.5%	19*
Canal boating*	3.5%	62.9%	28.2%	3.7%	0.0%	1.8%	48*
Yacht racing*	6.2%	11.8%	21.3%	29.1%	4.7%	26.9%	18*

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Figure 6 Frequency of Participation in the UK



Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

- Average participation has increased for many of the sailing sports which re-enforces the lack of casual participants this year compared to last year.
- Canal boating has been the activity that is done least frequently in the UK.

- Small sample sizes mean that the large changes in average participation frequency should be treated with caution.

Table 12 Average number of times participated in the UK 2003 - 2010

	Average participation in the UK							
	2003	2004	2005	2006	2007	2008	2009	2010
Canoeing	3.6	3.6	5.7	4.3	3.9	4.9	6.9	4.8
Water skiing	3.4	1.6	5.7	4.5	4.7	8.7	6.3	4.7
Small sail boat activities	5.2	4.4	5.1	4.9	4.8	7.7	5.0	5.3
Rowing/Sculling*	5.7	5.0	9.6	9.2	13.0	6.1	6.1	9.1
Windsurfing	3.4	3.7	5.3	4.0	1.6	3.5	4.1	5.8
Using personal watercraft*	3.8	4.1	4.1	4.9	2.2	3.4	4.4	3.3
Motor boating/Cruising	4.1	4.7	4.5	4.7	4.8	4.8	4.5	6.4
Yacht cruising	2.6	4.7	3.9	4.0	6.1	4.5	5.4	5.5
Power boating	5.7	4.5	5.1	6.0	5.2	8.7	6.8	5.2
Small sail boat racing*	4.1	4.6	8.7	4.3	9.1	15.2	4.7	11.5
Canal boating*	2.3	3.7	2.3	2.3	2.7	3.7	3.8	2.6
Yacht racing*	7.6	8.9	8.8	4.6	13.3	22.5	6.0	13.4

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Table 13 and later Table 16 convert the participation rates into estimates of how many people are participating how frequently in each sport. The category of participation with the highest number of participants has been highlighted in blue and bold.

Table 13 Frequency of Participation in the UK (participants) 2010

	Frequency of participation							Total Number of people participating	Base
	Never	Once	2-5 times	6-12 times	13-25 times	More than 25 times			
Canoeing	214,873	305,956	<b>321,003</b>	113,325	52,687	48,282	841,253	226	
Water skiing	<b>75,698</b>	75,360	61,091	37,340	5,136	17,680	196,607	59	
Small sail boat activities	71,062	107,763	<b>109,157</b>	70,872	18,519	19,399	325,710	88	
Rowing/Sculling*	9,772	<b>51,840</b>	47,080	29,556	3,809	34,291	166,577	38*	
Windsurfing*	44,401	45,424	<b>74,797</b>	44,802	10,256	13,907	189,185	50*	
Using personal watercraft	<b>97,624</b>	18,757	27,776	14,402	4,411	7,304	72,648	38*	
Motor boating/Cruising	107,539	<b>162,070</b>	63,621	40,205	14,864	60,735	341,495	107	
Yacht cruising	62,848	<b>85,101</b>	56,744	10,400	15,341	23,785	191,372	59	
Power boating	<b>90,646</b>	62,275	43,862	13,933	23,510	16,720	160,300	58	
Small sail boat racing*	4,411	9,430	<b>31,948</b>	11,646	5,517	20,376	78,917	19*	
Canal boating	7,045	<b>128,039</b>	57,530	7,467	-	3,601	196,637	48*	
Yacht racing*	4,411	8,377	15,119	<b>20,612</b>	3,303	19,099	66,510	18*	

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

- As most activities conducted abroad are done on holiday few participants undertake the majority of their activities abroad.
- Using personal watercraft is the only activity to show more people participating up to 5 times while abroad compared to those not participating, indicating that they are likely to be undertaking this activity multiple times while on holiday.

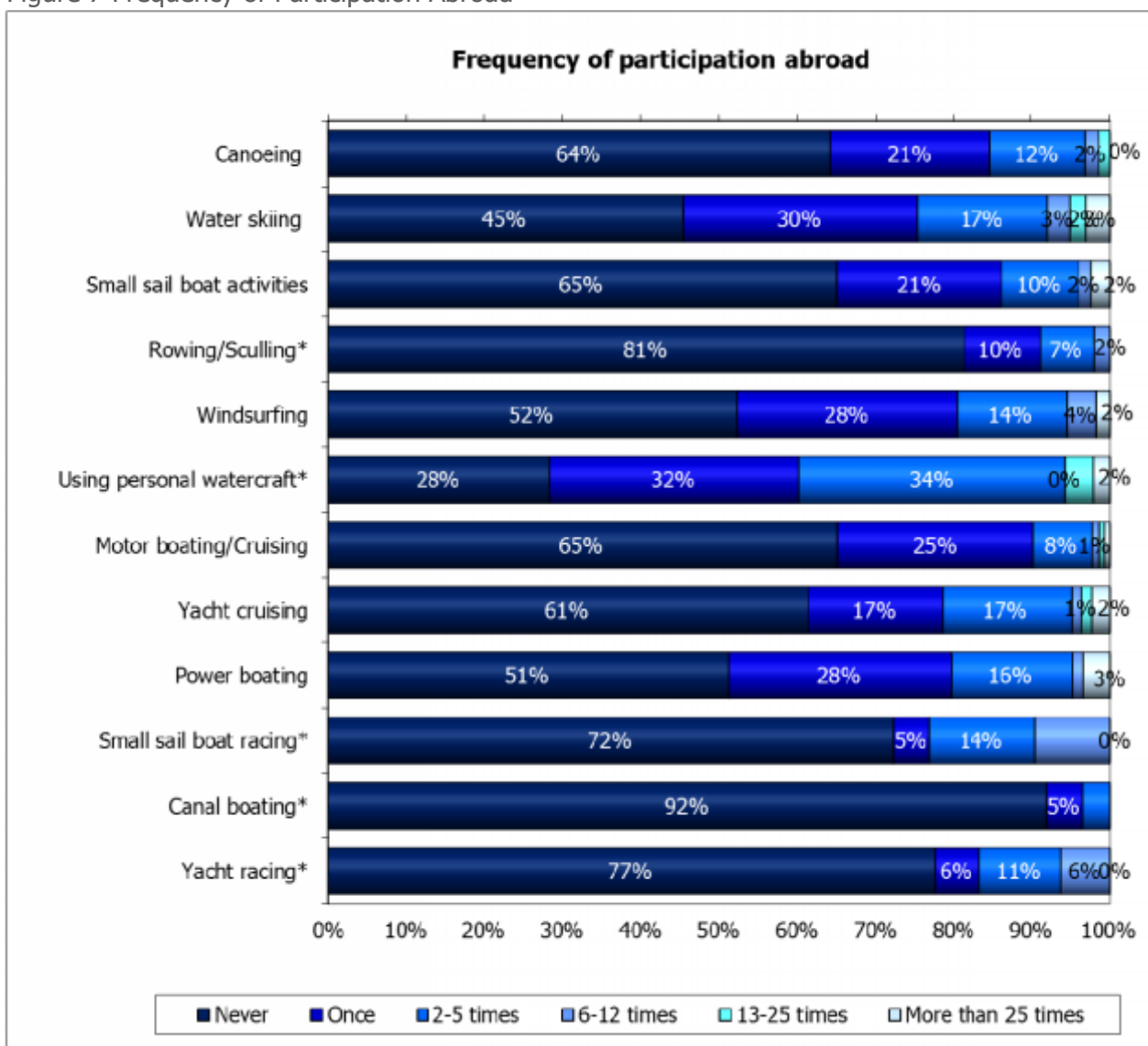
Table 14 Frequency of Participation Abroad

	Frequency of participation						Base
	Never	Once	2-5 times	6-12 times	13-25 times	More than 25 times	
Canoeing	64.1%	20.5%	12.2%	1.7%	1.4%	0.0%	226
Water skiing	45.4%	29.8%	16.8%	2.9%	2.0%	3.1%	59
Small sail boat activities	64.9%	21.2%	9.8%	1.5%	0.0%	2.5%	88
Rowing/Sculling*	81.2%	10.0%	6.8%	2.0%	0.0%	0.0%	38*
Windsurfing	52.2%	28.0%	14.3%	3.6%	0.0%	1.8%	50*
Using personal watercraft*	28.3%	31.8%	34.2%	0.0%	3.6%	2.1%	38*
Motor boating/Cruising	65.0%	25.2%	7.6%	1.0%	0.6%	0.7%	107
Yacht cruising	61.3%	17.1%	16.8%	1.2%	1.3%	2.3%	59
Power boating	51.1%	28.5%	15.6%	1.4%	0.0%	3.4%	58
Small sail boat racing*	72.2%	4.6%	13.7%	9.6%	0.0%	0.0%	19*
Canal boating*	91.9%	4.6%	3.5%	0.0%	0.0%	0.0%	48*
Yacht racing*	77.4%	5.8%	10.5%	6.2%	0.0%	0.0%	18*

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Figure 7 Frequency of Participation Abroad



Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size



- Average participation is lower abroad compared to the UK due to the ease of access in the UK for residents.
- Water skiing and using personal watercraft are the activities with the highest average participation level which is consistent with previous years.

Table 15 Average number of times participated abroad 2003 - 2010

	Average participation abroad							
	2003	2004	2005	2006	2007	2008	2009	2010
Canoeing	1.6	0.8	1.4	0.8	1.7	1.4	1.3	1.1
Water skiing	1.7	3.1	2.2	2.3	3.3	1.5	4.2	2.5
Small sail boat activities	1.5	2.2	1.4	1.2	1.7	1.5	1.5	1.4
Rowing/Sculling*	1.7	1.0	0.4	0.3	1.5	1.3	0.9	0.5
Windsurfing	1.8	2.1	1.9	1.7	2.6	2.2	2.3	1.6
Using personal watercraft*	2.1	2.3	3.4	2.3	2.8	2.4	1.9	2.8
Motor boating/Cruising	0.5	1.8	1.4	2.0	1.8	1.1	1.4	0.9
Yacht cruising	0.9	0.9	1.6	1.1	1.6	0.7	2.2	1.8
Power boating	1.9	2.5	1.6	2.0	2.2	1.9	1.6	2.0
Small sail boat racing*	1.4	2.1	1.8	1.3	1.3	3.3	1.6	1.4
Canal boating*	0.2	0.7	0.0	0.1	0.3	0.3	0.2	0.2
Yacht racing*	2.0	1.8	1.1	1.0	1.8	2.2	3.4	1.0

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Table 16 Frequency of Participation Abroad (participants) 2010

	Frequency of participation						Total Number of people participating	Base
	Never	Once	2-5 times	6-12 times	13-25 times	More than 25 times		
Canoeing	<b>677,356</b>	216,815	128,735	18,160	15,062	-	378,771	226
Water skiing	<b>123,527</b>	81,251	45,813	7,860	5,490	8,365	148,778	59
Small sail boat activities	<b>257,619</b>	84,270	39,022	6,084	-	9,777	139,152	88
Rowing/Sculling*	<b>143,142</b>	17,658	11,958	3,590	-	-	33,206	38*
Windsurfing	<b>122,043</b>	65,515	33,338	8,496	-	4,195	111,543	50*
Using personal watercraft*	48,209	54,096	<b>58,256</b>	-	6,076	3,635	122,063	38*
Motor boating/Cruising	<b>291,807</b>	112,999	34,020	4,289	2,836	3,082	157,226	107
Yacht cruising	<b>155,825</b>	43,494	42,609	3,082	3,312	5,897	98,394	59
Power boating	<b>128,270</b>	71,436	39,251	3,449	-	8,539	122,675	58
Small sail boat racing*	<b>60,137</b>	3,797	11,392	8,001	-	-	23,190	19*
Canal boating*	<b>187,235</b>	9,402	7,045	-	-	-	16,448	48*
Yacht racing*	<b>54,913</b>	4,131	7,466	4,411	-	-	16,008	18*

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

## 4. Participation by Socio-Demographic Group

The following tables show participation by age, gender, socio-economic group (SEG) as well as life stage, ethnicity, and working status. For each of these groups there are two tables. One showing the participation rates as a percentage and a second that converts these percentages into participant numbers for the UK adult population (those aged 16+), i.e. Great Britain and Northern Ireland.

### Participation by Gender

The male participation rate for an activity has been highlighted in blue and bold if it is more than twice the female participation rate.

- The difference between male and female participation remains large; at the total 'Any boating activity' level there are 1.7 male participants for every female participant
- Canal boating is the only activity that is equally popular for both males and females
- The gap between males and females is largest for specialist sports

Table 17 Participation in 2010 by Gender (percentage)

	Male	Female	Total UK
Any boating activity	7.33%	3.99%	5.61%
Any sailboat activities/yacht cruising	1.59%	0.87%	1.22%
Any sailboat racing/yacht racing	<b>0.43%</b>	0.15%	0.28%
Any power/motor activities	1.58%	1.06%	1.31%
Canoeing	2.81%	1.53%	2.15%
Water skiing	0.71%	0.41%	0.56%
Small sail boat activities	1.09%	0.55%	0.81%
Rowing	<b>0.50%</b>	0.22%	0.36%
Windsurfing	<b>0.80%</b>	0.17%	0.48%
Using personal watercraft	<b>0.49%</b>	0.22%	0.35%
Motor boating/Cruising	1.18%	0.66%	0.92%
Yacht cruising	0.63%	0.41%	0.52%
Power boating	0.66%	0.37%	0.51%
Small sail boat racing	<b>0.26%</b>	0.09%	0.17%
Canal boating	0.44%	0.39%	0.42%
Yacht racing	0.19%	0.10%	0.14%
UK adult population	23,806,412	25,244,588	49,051,000
Unweighted Base	5,983	6,579	12,562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Table 18 Participation in 2010 by Gender (participants)

	Male	Female	Total UK
Any boating activity	1,744,457	1,007,484	2,751,941
Any sailboat activities/yacht cruising	377,929	220,361	598,290
Any sailboat racing/yacht racing	101,241	37,568	138,808
Motor boating / cruising or canal boating	377,284	266,860	644,144
Canoeing	668,914	387,213	1,056,127
Water skiing	169,020	103,285	272,305
Small sail boat activities	258,528	138,244	396,772
Rowing/Sculling	119,573	56,775	176,348
Windsurfing	190,582	43,004	233,586
Using personal watercraft	115,767	54,505	170,272
Motor boating/Cruising	281,171	167,863	449,034
Yacht cruising	149,528	104,691	254,219
Power boating	157,181	93,765	250,945
Small sail boat racing	60,774	22,554	83,328
Canal boating	104,686	98,997	203,682
Yacht racing	44,877	26,044	70,921
UK adult population	23,806,412	25,244,588	49,051,000
Unweighted Base	5,983	6,579	12,562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

The following table shows the participation rates for each boating and watersport activity separately by males and females.

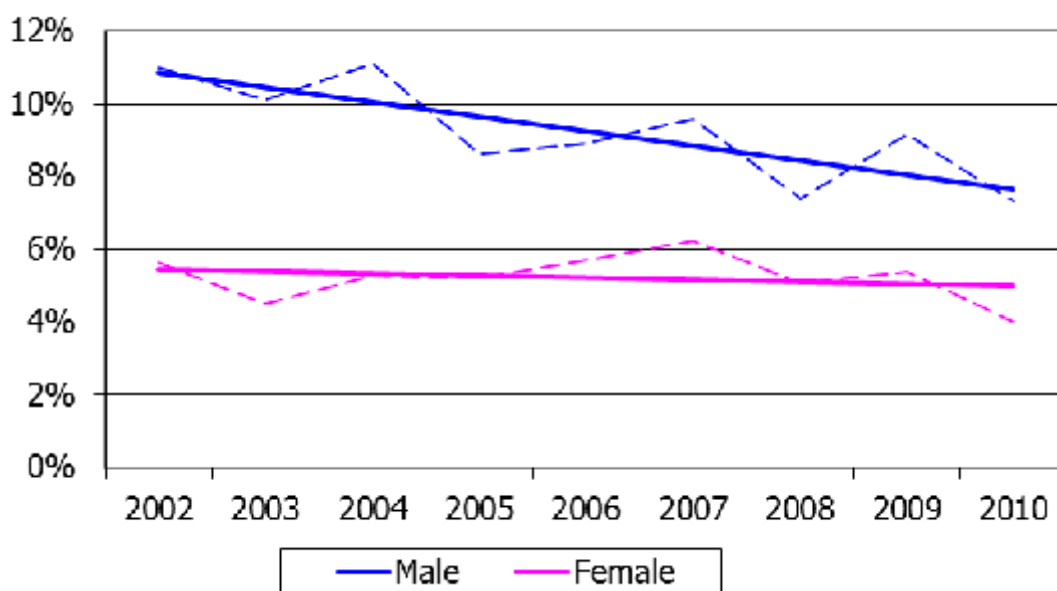
- Between 2009 and 2010 two activities increased or remained the same for male participation levels; windsurfing remains at 0.8% and motor boating/cruising increased to 1.2% from 1.1%
- For females, water skiing, yacht cruising and yacht racing remain at the same participation level between 2009 and 2010
- The proportion decrease between 2009 and 2010 for females is slightly more than it is for males for 'Any boating activity' largely due to participation levels for males being stable in windsurfing and motor boating/cruising
- Changes in male participation tend to follow the overall trend for most activities (as there are many more males compared than females participating in most sports)
- Although the figures fluctuate from year to year, the underlying male trend is downward for all activities, except canal boating where it is stable
- There is less change in female participation compared to the males, although most sports are still showing a downward trend in 2010
- Figure 8 shows the regression trend lines of participation for "Any boating activity" for males and females over the 9 years

Table 19 Participation Trends by Gender (percentage)

<b>Male</b>									
	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
Any boating activity	11.0%	10.1%	11.1%	8.6%	8.9%	9.6%	7.4%	9.2%	7.3%
Any sailboat activities/yacht cruising	2.7%	1.9%	2.5%	2.2%	1.8%	2.4%	1.9%	2.4%	1.6%
Any sailboat racing/yacht racing	1.2%	1.5%	1.4%	0.6%	0.7%	1.1%	0.6%	0.7%	0.4%
Motor boating / cruising or canal boating	1.9%	1.8%	1.9%	1.9%	2.2%	2.5%	1.8%	1.7%	1.6%
Canoeing	3.6%	3.1%	3.6%	2.9%	3.0%	2.6%	2.4%	3.2%	2.8%
Water skiing	2.3%	1.8%	1.8%	1.0%	1.0%	1.2%	0.7%	0.9%	0.7%
Small sail boat activities	1.7%	0.9%	1.5%	1.4%	1.2%	1.4%	1.0%	1.5%	1.1%
Rowing/Sculling	1.8%	1.6%	2.0%	1.2%	1.2%	1.0%	0.5%	1.0%	0.5%
Windsurfing	1.6%	1.1%	1.7%	0.8%	0.7%	0.7%	0.6%	0.8%	0.8%
Using personal watercraft	1.9%	1.8%	1.9%	1.1%	0.7%	0.7%	1.0%	1.0%	0.5%
Motor boating/Cruising	1.3%	1.3%	1.3%	1.4%	1.6%	1.5%	1.2%	1.1%	1.2%
Yacht cruising	1.3%	1.0%	1.2%	0.9%	0.7%	1.1%	1.1%	1.2%	0.6%
Power boating	1.1%	1.2%	1.5%	1.0%	1.0%	1.0%	0.8%	1.6%	0.7%
Small sail boat racing	0.9%	1.2%	1.2%	0.4%	0.5%	0.7%	0.4%	0.4%	0.3%
Canal boating	0.5%	0.7%	0.8%	0.5%	0.7%	1.1%	0.6%	0.6%	0.4%
Yacht racing	0.5%	0.4%	0.4%	0.2%	0.3%	0.5%	0.3%	0.3%	0.2%
<b>Female</b>									
	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
Any boating activity	5.6%	4.5%	5.3%	5.2%	5.7%	6.2%	5.1%	5.4%	4.0%
Any sailboat activities/yacht cruising	1.4%	1.1%	1.6%	1.2%	1.6%	1.3%	1.3%	1.2%	0.9%
Any sailboat racing/yacht racing	0.6%	0.5%	0.4%	0.3%	0.5%	0.4%	0.2%	0.2%	0.1%
Motor boating / cruising or canal boating	1.1%	1.0%	1.1%	1.5%	1.8%	2.2%	1.5%	1.5%	1.1%
Canoeing	1.6%	1.4%	1.7%	1.4%	1.5%	1.7%	1.6%	1.9%	1.5%
Water skiing	1.2%	0.7%	0.6%	0.5%	0.4%	0.4%	0.5%	0.4%	0.4%
Small sail boat activities	0.9%	0.7%	1.1%	0.8%	1.0%	0.9%	0.8%	0.8%	0.5%
Rowing/Sculling	0.8%	0.8%	0.8%	0.8%	0.6%	0.4%	0.3%	0.5%	0.2%
Windsurfing	0.8%	0.4%	0.5%	0.4%	0.4%	0.3%	0.1%	0.3%	0.2%
Using personal watercraft	0.5%	0.3%	0.3%	0.4%	0.4%	0.4%	0.4%	0.4%	0.2%
Motor boating/Cruising	0.8%	0.6%	0.5%	1.0%	0.8%	1.3%	1.0%	0.8%	0.7%
Yacht cruising	0.6%	0.5%	0.6%	0.4%	0.7%	0.5%	0.6%	0.4%	0.4%
Power boating	0.6%	0.6%	0.5%	0.5%	0.5%	0.4%	0.4%	0.7%	0.4%
Small sail boat racing	0.6%	0.4%	0.4%	0.2%	0.3%	0.3%	0.1%	0.2%	0.1%
Canal boating	0.4%	0.5%	0.6%	0.6%	0.9%	0.9%	0.5%	0.7%	0.4%
Yacht racing	0.2%	0.1%	0.2%	0.1%	0.2%	0.2%	0.1%	0.1%	0.1%

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Figure 8 Overall Trends in Participation for 'Any Boating Activity' by Gender



Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## Participation by Age

- The youngest age group has the highest proportion of participants in half of the 12 activities
- Motor boating/cruising is the only activity with the highest participation rate among the over 55 age group
- The larger number of people in the 35-54 age group means that, in absolute terms, the largest volume of participants for 7 of the 12 activities comes from this group
- The activities with the highest volume of participants from the youngest age group tend to be the most physically active and fast watersports; water skiing, windsurfing, using personal watercraft and yacht racing
- Canal boating is the only activity that has the most participants in the over 55 age group

Table 20 Participation by Age Group (percentage)

	Age groups			Total UK
	16-34	35-54	55+	
Any boating activity	7.25%	6.81%	2.94%	5.61%
Any sailboat activities/yacht cruising	1.20%	1.46%	0.99%	1.22%
Any sailboat racing/yacht racing	0.36%	0.31%	0.19%	0.28%
Motor boating / cruising or canal boating	1.30%	1.26%	1.38%	1.31%
Canoeing	3.08%	2.93%	0.54%	2.15%
Water skiing	1.08%	0.59%	0.05%	0.56%
Small sail boat activities	0.82%	0.91%	0.70%	0.81%
Rowing/Sculling	0.47%	0.53%	0.09%	0.36%
Windsurfing	0.75%	0.52%	0.18%	0.48%
Using personal watercraft	0.64%	0.41%	0.02%	0.35%
Motor boating/Cruising	0.85%	0.94%	0.95%	0.92%
Yacht cruising	0.49%	0.62%	0.43%	0.52%
Power boating	0.65%	0.76%	0.13%	0.51%
Small sail boat racing	0.20%	0.21%	0.11%	0.17%
Canal boating	0.45%	0.37%	0.43%	0.42%
Yacht racing	0.18%	0.15%	0.10%	0.14%
UK adult population	14,962,681	17,179,159	16,909,160	49,051,000
Unweighted Base	3,490	3,991	5,081	12,562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Table 21 Participation by Age Group (participants)

	Age groups			Total UK
	16-34	35-54	55+	
Any boating activity	1,084,645	<b>1,169,678</b>	497,618	2,751,941
Any sailboat activities/yacht cruising	179,093	<b>251,327</b>	167,871	598,290
Any sailboat racing/yacht racing	<b>53,851</b>	53,446	31,511	138,808
Motor boating / cruising or canal boating	193,804	217,265	<b>233,075</b>	644,144
Canoeing	460,528	<b>503,678</b>	91,921	1,056,127
Water skiing	<b>161,639</b>	101,511	9,154	272,305
Small sail boat activities	122,340	<b>156,730</b>	117,702	396,772
Rowing/Sculling	70,030	<b>90,924</b>	15,394	176,348
Windsurfing	<b>112,863</b>	90,166	30,557	233,586
Using personal watercraft	<b>96,394</b>	71,051	2,826	170,272
Motor boating/Cruising	126,704	<b>161,434</b>	160,895	449,034
Yacht cruising	74,003	<b>106,707</b>	73,510	254,219
Power boating	97,630	<b>130,820</b>	22,495	250,945
Small sail boat racing	29,505	<b>35,837</b>	17,986	83,328
Canal boating	67,100	64,402	<b>72,180</b>	203,682
Yacht racing	<b>27,659</b>	25,828	17,434	70,921
UK adult population	14,962,681	17,179,159	16,909,160	49,051,000
Unweighted Base	3,490	3,991	5,081	12,562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

- There is a steady decline in participation among the 16-34 age group for "Any boating activity" over the last 9 years
- Participation rates have halved in many sports since 2002 among the 16-34 age group. Particularly affected are (starting with the most affected):
  - Small sail boat racing
  - Rowing
  - Using personal watercraft
  - Yacht racing
  - Water skiing
- Participation in the 35-54 age group is much more stable 2006-2009 showed growth compared to the baseline in 2002 though numbers are now the lowest they have ever been
- The decline is largely driven by a decline in sailing activities; small boat racing, windsurfing and water skiing showing the steepest falls
- Participation among the over 55 age group is more resilient. However, this age group has the lowest participation rate of all the age groups.
- The over 55s are the only age group to show an increase in their participation over 2002 levels for "any boating activity". They have the same 2006-2009 peak in activity and fall in 2010 as the 35-54 age group

Table 22 Participation Trends by Age 2002 -2010

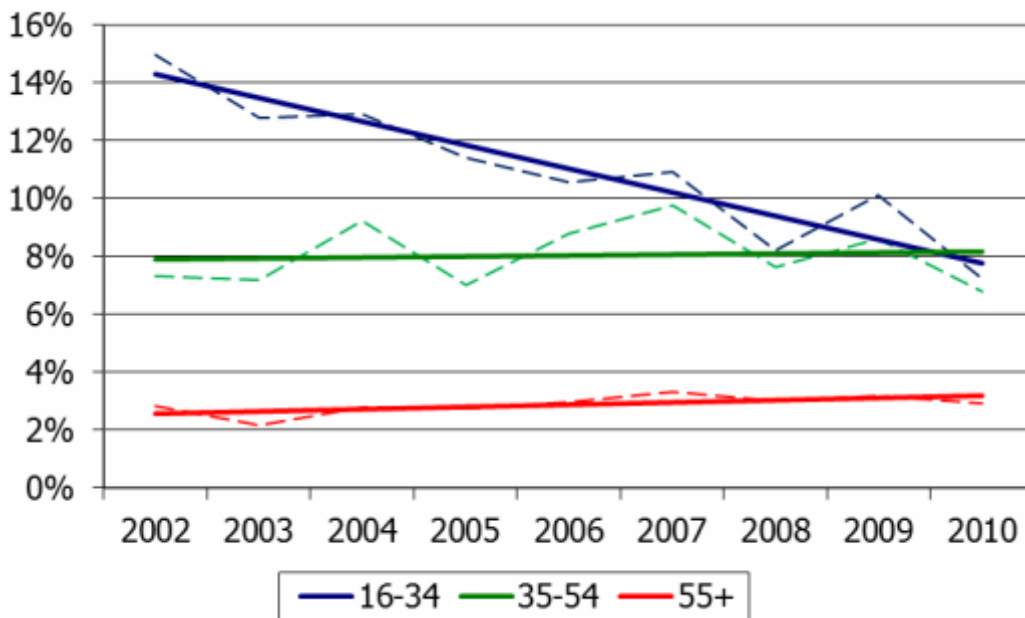
	16-34 participation rates								
	2002	2003	2004	2005	2006	2007	2008	2009	2010
Any boating activity	15.0%	12.8%	12.9%	11.4%	10.6%	10.9%	8.2%	10.1%	7.2%
Small sailboat activities or yacht cruising	2.5%	2.1%	2.9%	2.1%	2.1%	2.0%	1.9%	1.8%	1.2%
Small sailboat racing or yacht racing	1.6%	1.7%	1.6%	0.7%	0.8%	0.9%	0.4%	0.6%	0.4%
Motor boating / cruising or canal boating	2.0%	2.1%	1.8%	2.1%	2.4%	2.5%	1.6%	1.7%	1.3%
Canoeing	5.5%	4.7%	5.3%	4.3%	3.8%	3.7%	3.1%	4.2%	3.1%
Water skiing	3.6%	2.8%	2.3%	1.6%	1.3%	1.4%	1.2%	1.3%	1.1%
Small sail boat activities	1.6%	1.1%	2.3%	1.7%	1.5%	1.3%	1.1%	1.2%	0.8%
Rowing/sculling	2.5%	2.5%	2.8%	1.9%	1.6%	1.2%	0.5%	1.4%	0.5%
Windsurfing	2.1%	1.3%	1.9%	1.2%	1.1%	0.8%	0.5%	0.9%	0.8%
Using personal watercraft	2.7%	2.5%	1.8%	1.5%	1.1%	1.1%	1.4%	1.6%	0.6%
Motor boating/Cruising	1.6%	1.4%	1.3%	1.5%	1.7%	1.6%	1.2%	1.1%	0.8%
Yacht cruising	1.3%	1.0%	0.9%	0.6%	0.7%	0.7%	0.9%	0.8%	0.5%
Power boating	1.5%	1.7%	1.4%	1.2%	0.9%	0.9%	0.8%	1.6%	0.7%
Small sail boat racing	1.3%	1.3%	1.4%	0.6%	0.5%	0.7%	0.3%	0.4%	0.2%
Canal boating	0.3%	0.9%	0.5%	0.6%	0.8%	1.0%	0.5%	0.6%	0.4%
Yacht racing	0.6%	0.5%	0.4%	0.1%	0.3%	0.3%	0.2%	0.2%	0.2%
	35-54 participation rates								
	2002	2003	2004	2005	2006	2007	2008	2009	2010
Any boating activity	7.3%	7.2%	9.2%	7.0%	8.8%	9.8%	7.6%	8.6%	6.8%
Small sailboat activities or yacht cruising	2.3%	1.4%	2.2%	1.7%	2.2%	2.6%	1.8%	2.2%	1.5%
Small sailboat racing or yacht racing	0.9%	0.7%	0.9%	0.4%	0.7%	0.9%	0.5%	0.5%	0.3%
Motor boating / cruising or canal boating	1.4%	1.5%	2.1%	1.9%	2.0%	3.1%	1.7%	1.9%	1.3%
Canoeing	2.2%	1.8%	2.7%	1.9%	2.7%	2.9%	2.8%	3.1%	2.9%
Water skiing	1.5%	1.1%	1.3%	0.8%	0.7%	0.9%	0.7%	0.5%	0.6%
Small sail boat activities	1.7%	0.8%	1.3%	1.0%	1.6%	1.7%	1.1%	1.5%	0.9%
Rowing/sculling	1.3%	0.8%	1.2%	1.0%	1.0%	0.8%	0.4%	0.5%	0.5%
Windsurfing	1.4%	0.9%	1.3%	0.6%	0.6%	0.7%	0.5%	0.6%	0.5%
Using personal watercraft	0.7%	0.8%	1.3%	0.8%	0.6%	0.6%	0.8%	0.5%	0.4%
Motor boating/Cruising	1.0%	1.0%	1.2%	1.6%	1.1%	1.9%	1.3%	1.1%	0.9%
Yacht cruising	0.8%	0.7%	1.0%	0.8%	0.8%	1.0%	0.8%	0.9%	0.6%
Power boating	0.7%	0.7%	1.6%	0.8%	1.1%	0.9%	0.8%	1.7%	0.8%
Small sail boat racing	0.7%	0.7%	0.8%	0.2%	0.5%	0.7%	0.3%	0.4%	0.2%
Canal boating	0.7%	0.6%	1.1%	0.5%	0.9%	1.4%	0.5%	0.8%	0.4%
Yacht racing	0.4%	0.0%	0.3%	0.3%	0.3%	0.4%	0.2%	0.2%	0.2%
	55+ participation rates								
	2002	2003	2004	2005	2006	2007	2008	2009	2010
Any boating activity	2.8%	2.2%	2.8%	2.7%	3.0%	3.3%	3.0%	3.2%	2.9%
Small sailboat activities or yacht cruising	1.2%	1.1%	1.2%	1.3%	0.8%	1.1%	1.2%	1.3%	1.0%
Small sailboat racing or yacht racing	0.2%	0.6%	0.4%	0.3%	0.2%	0.3%	0.2%	0.2%	0.2%
Motor boating / cruising or canal boating	1.0%	0.7%	0.6%	1.0%	1.5%	1.5%	1.4%	1.3%	1.4%
Canoeing	0.3%	0.4%	0.3%	0.4%	0.5%	0.2%	0.2%	0.6%	0.5%
Water skiing	0.2%	0.0%	0.2%	0.1%	0.1%	0.1%	0.0%	0.2%	0.1%
Small sail boat activities	0.6%	0.6%	0.4%	0.8%	0.3%	0.5%	0.5%	0.8%	0.7%
Rowing/sculling	0.2%	0.3%	0.4%	0.2%	0.3%	0.1%	0.2%	0.3%	0.1%
Windsurfing	0.1%	0.1%	0.1%	0.0%	0.0%	0.1%	0.0%	0.1%	0.2%
Using personal watercraft	0.1%	0.0%	0.2%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
Motor boating/Cruising	0.6%	0.3%	0.2%	0.5%	0.9%	0.8%	0.9%	0.8%	1.0%
Yacht cruising	0.7%	0.5%	0.8%	0.5%	0.6%	0.7%	0.8%	0.7%	0.4%
Power boating	0.3%	0.3%	0.0%	0.3%	0.3%	0.4%	0.2%	0.2%	0.1%
Small sail boat racing	0.2%	0.4%	0.3%	0.1%	0.2%	0.1%	0.1%	0.1%	0.1%
Canal boating	0.4%	0.4%	0.5%	0.6%	0.6%	0.7%	0.6%	0.5%	0.4%
Yacht racing	0.0%	0.2%	0.1%	0.1%	0.1%	0.2%	0.2%	0.2%	0.1%

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Figure 9 shows the best fit trend lines of participation for "Any boating activity" for the 3 age groups over the 9 years. The solid lines represent the trend line and should not be confused with the actual participation rate indicated by the dashed line. Charts showing the regression trend lines by age groups for the individual activities are shown in Appendix 5.

- Participation among the younger age group has been declining steadily over the past 9 years.
- The 35-54 age group has maintained a trend line participation rate about the 8% mark
- The over 55 age group has increased their participation slightly over the past 9 years

Figure 9 Overall Trends in Participation for 'Any Boating Activity' by Age



Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## Participation by SEG

Each activity with the highest proportion of participants in each of the Socio Economic Groups<sup>2</sup> has been highlighted in blue and bold.

- The social-economic group AB has substantially higher participation rates in all sports than the other groups.
- The greater number of people in the C1 and C2DE socio-economic groups compared to the AB group means that although the participation rate is higher for ABs there is a greater number of participants in the other socio-economic groups for 4 of the 12 activities.

<sup>2</sup> Broadly, ABs are managerial and professional occupations; higher or intermediate managerial, administrative and professional roles. C1s are junior managerial, administrative and professional roles, supervisory or clerical. C2DEs are manual roles (skilled, semi and unskilled) or those who have never worked or are long-term unemployed.



Table 23 Participation by SEG (percentages)

	SEG			
	AB	C1	C2DE	Total UK
Any boating activity	<b>10.93%</b>	6.64%	2.96%	5.61%
Any sailboat activities/yacht cruising	<b>2.64%</b>	1.56%	0.47%	1.22%
Any sailboat racing/yacht racing	<b>0.62%</b>	0.29%	0.15%	0.28%
Motor boating / cruising or canal boating	<b>2.43%</b>	1.46%	0.80%	1.31%
Canoeing	<b>3.98%</b>	2.89%	1.01%	2.15%
Water skiing	<b>1.09%</b>	0.68%	0.27%	0.56%
Small sail boat activities	<b>1.90%</b>	1.00%	0.28%	0.81%
Rowing/Sculling	<b>0.75%</b>	0.45%	0.16%	0.36%
Windsurfing	<b>1.21%</b>	0.41%	0.23%	0.48%
Using personal watercraft	<b>0.51%</b>	0.46%	0.22%	0.35%
Motor boating/Cruising	<b>1.71%</b>	1.11%	0.50%	0.92%
Yacht cruising	<b>1.08%</b>	0.68%	0.21%	0.52%
Power boating	<b>1.22%</b>	0.52%	0.24%	0.51%
Small sail boat racing	<b>0.39%</b>	0.22%	0.06%	0.17%
Canal boating	<b>0.78%</b>	0.35%	0.32%	0.42%
Yacht racing	<b>0.36%</b>	0.09%	0.09%	0.14%
None	89.07%	93.36%	<b>97.04%</b>	94.39%
UK adult population	9,464,079	14,860,558	24,726,364	49,051,000
Unweighted Base	2,174	3,350	7,038	12562

Table 24 Participation by SEG (participants)

	SEG			
	AB	C1	C2DE	Total UK
Any boating activity	<b>1,034,458</b>	986,091	731,391	2,751,941
Any sailboat activities/yacht cruising	<b>250,256</b>	231,603	116,431	598,290
Any sailboat racing/yacht racing	<b>58,891</b>	42,624	37,294	138,808
Motor boating / cruising or canal boating	<b>229,994</b>	216,291	197,858	644,144
Canoeing	376,283	<b>429,282</b>	250,561	1,056,127
Water skiing	<b>103,462</b>	101,712	67,131	272,305
Small sail boat activities	<b>179,934</b>	148,105	68,733	396,772
Rowing/Sculling	<b>71,202</b>	66,789	38,357	176,348
Windsurfing	<b>114,830</b>	61,536	57,220	233,586
Using personal watercraft	48,389	<b>68,375</b>	<b>53,507</b>	170,272
Motor boating/Cruising	161,999	<b>164,593</b>	122,442	449,034
Yacht cruising	<b>102,323</b>	101,143	50,753	254,219
Power boating	<b>115,145</b>	76,978	58,823	250,945
Small sail boat racing	<b>36,651</b>	32,316	14,360	83,328
Canal boating	73,485	51,698	<b>78,499</b>	203,682
Yacht racing	<b>34,368</b>	13,620	22,934	70,921
None	8,429,620	13,874,467	<b>23,994,972</b>	46,299,059
UK adult population	9,464,079	14,860,558	24,726,364	49,051,000
Unweighted Base	2,174	3,350	7,038	12562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

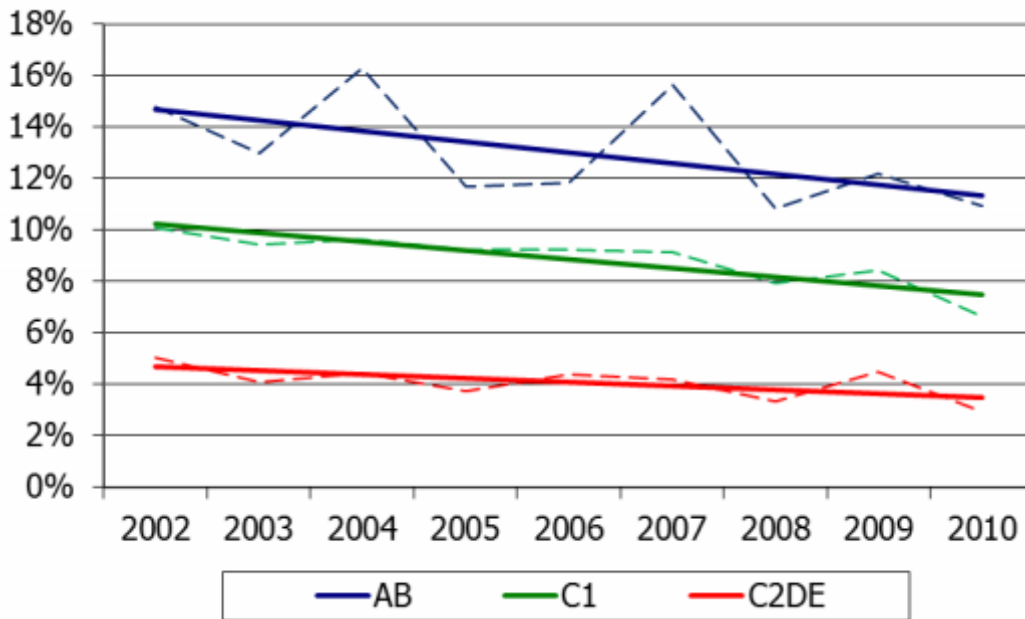
- The participation levels are more erratic for the AB socio-economic group but do show a downward trend.
- All three socio-economic groups are showing negative trends but it is more pronounced for the AB group as they have the highest participation proportion.

Table 25 Participation trends by SEG 2002-2010

	<b>AB</b>									
	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	
Any boating activity	14.8%	13.0%	16.3%	11.7%	11.9%	15.6%	10.8%	12.2%	10.9%	
Canoeing	4.1%	4.1%	5.3%	3.4%	4.1%	4.1%	3.5%	4.3%	4.0%	
Water skiing	2.8%	2.4%	2.7%	1.0%	1.5%	1.5%	1.0%	1.0%	1.1%	
Small sail boat activities	2.4%	1.2%	2.8%	2.2%	2.1%	3.3%	1.9%	2.7%	1.9%	
Rowing/Sculling	1.8%	2.1%	3.1%	1.8%	1.4%	1.5%	0.7%	1.2%	0.8%	
Windsurfing	2.1%	1.2%	2.9%	1.2%	0.8%	1.1%	1.0%	1.2%	1.2%	
Using personal watercraft	1.6%	1.4%	1.8%	1.2%	0.7%	0.7%	0.7%	1.2%	0.5%	
Motor boating/Cruising	1.6%	1.3%	1.6%	2.2%	2.2%	2.5%	2.1%	1.6%	1.7%	
Yacht cruising	2.3%	2.2%	1.8%	2.0%	1.3%	2.0%	1.5%	1.8%	1.1%	
Power boating	1.7%	1.3%	2.1%	1.1%	1.2%	1.1%	0.8%	2.1%	1.2%	
Small sail boat racing	0.7%	1.9%	1.9%	0.6%	0.7%	1.3%	0.6%	0.5%	0.4%	
Canal boating	1.4%	1.4%	1.9%	1.0%	1.1%	2.1%	0.7%	1.1%	0.8%	
Yacht racing	0.5%	0.6%	0.7%	0.5%	0.4%	0.9%	0.5%	0.3%	0.4%	
	<b>C1</b>									
	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	
Any boating activity	10.1%	9.5%	9.7%	9.2%	9.2%	9.1%	7.9%	8.5%	6.6%	
Canoeing	2.9%	3.2%	2.8%	2.8%	2.6%	2.5%	2.4%	3.4%	2.9%	
Water skiing	1.6%	1.5%	1.3%	1.3%	0.8%	1.1%	0.8%	0.9%	0.7%	
Small sail boat activities	1.3%	1.1%	1.5%	1.5%	1.4%	0.9%	1.1%	1.2%	1.0%	
Rowing/Sculling	1.8%	1.7%	1.3%	1.2%	1.3%	0.7%	0.4%	1.0%	0.4%	
Windsurfing	1.1%	1.1%	1.3%	0.9%	0.8%	0.6%	0.3%	0.5%	0.4%	
Using personal watercraft	1.2%	1.9%	1.0%	1.2%	0.8%	0.7%	1.2%	0.7%	0.5%	
Motor boating/Cruising	1.1%	1.4%	1.4%	1.5%	1.3%	1.9%	1.3%	1.0%	1.1%	
Yacht cruising	1.2%	0.6%	1.6%	0.7%	0.9%	1.0%	1.4%	0.9%	0.7%	
Power boating	0.8%	1.4%	1.0%	1.1%	0.9%	0.9%	0.7%	1.3%	0.5%	
Small sail boat racing	1.2%	1.0%	0.9%	0.4%	0.6%	0.5%	0.2%	0.3%	0.2%	
Canal boating	0.4%	0.6%	0.6%	0.7%	1.0%	1.4%	0.9%	0.6%	0.3%	
Yacht racing	0.6%	0.2%	0.3%	0.2%	0.4%	0.4%	0.2%	0.3%	0.1%	
	<b>C2DE</b>									
	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	
Any boating activity	5.1%	4.1%	4.4%	3.8%	4.4%	4.2%	3.3%	4.5%	3.0%	
Canoeing	1.4%	1.1%	1.6%	1.2%	1.3%	1.2%	1.1%	1.4%	1.0%	
Water skiing	1.0%	0.7%	0.6%	0.4%	0.3%	0.4%	0.3%	0.4%	0.3%	
Small sail boat activities	0.8%	0.6%	0.6%	0.5%	0.5%	0.5%	0.4%	0.5%	0.3%	
Rowing/Sculling	0.6%	0.5%	0.8%	0.6%	0.5%	0.4%	0.2%	0.4%	0.2%	
Windsurfing	0.7%	0.4%	0.3%	0.2%	0.3%	0.2%	0.1%	0.3%	0.2%	
Using personal watercraft	0.7%	0.5%	0.9%	0.4%	0.4%	0.4%	0.4%	0.5%	0.2%	
Motor boating/Cruising	0.6%	0.5%	0.4%	0.7%	0.7%	0.7%	0.6%	0.7%	0.5%	
Yacht cruising	0.3%	0.3%	0.2%	0.1%	0.3%	0.3%	0.2%	0.3%	0.2%	
Power boating	0.3%	0.4%	0.6%	0.5%	0.5%	0.5%	0.4%	0.7%	0.2%	
Small sail boat racing	0.4%	0.3%	0.3%	0.1%	0.2%	0.2%	0.1%	0.2%	0.1%	
Canal boating	0.2%	0.3%	0.3%	0.3%	0.6%	0.4%	0.2%	0.5%	0.3%	
Yacht racing	0.1%	0.2%	0.1%	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Figure 10 Trends for 'Any boating activity' by SEG 2002-2010



Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## Participation by Ethnicity

This year we continued to collect the respondent's ethnicity, first captured in 2008. The tables below show the participation rates for six ethnic groups; White British, White Irish, Other White Background, Asian, Black African or Caribbean and Other/ Mixed. The sample sizes for several of the minority ethnic groups are small, ranging from 94 to 740 respondents. This means the statistics within these are less reliable than the national estimates.

- Those with a White Irish background have the highest participation rate for any of the boating activities among the ethnic groups, as was the case in 2009
- The greater number of White British residents means that this group dominates all activities in terms of the volume of people participating in each activity
- Participation rates among White British show some of the most consistent declines
- Those from a Black or Asian background are the least likely to have participated in any of the boating activities

Table 26 Participation by Ethnicity (percentages)

Ethnic Origin							
	White British	White Irish	Other White background	Asian	Black	Mixed/ Other	Total
Any boating activity	5.8%	<b>7.04%</b>	5.15%	3.63%	3.81%	5.62%	5.61%
Any sailboat activities/yacht cruising	1.3%	0.75%	<b>1.52%</b>	0.29%	0.54%	0.92%	1.22%
Any sailboat racing/yacht racing	0.3%	0.00%	<b>0.54%</b>	0.23%	0.49%	0.00%	0.28%
Motor boating / cruising or canal boating	1.3%	<b>2.18%</b>	1.38%	1.67%	0.23%	0.00%	1.31%
Canoeing	2.34%	1.69%	1.59%	0.72%	0.89%	<b>2.96%</b>	2.15%
Water skiing	0.53%	0.00%	0.97%	0.38%	<b>1.04%</b>	0.67%	0.56%
Small sail boat activities	<b>0.92%</b>	0.75%	0.33%	0.14%	0.23%	0.60%	0.81%
Rowing/Sculling	0.36%	0.40%	0.19%	0.51%	<b>0.53%</b>	0.00%	0.36%
Windsurfing	0.47%	0.00%	<b>0.76%</b>	0.29%	0.52%	0.64%	0.48%
Using personal watercraft	0.36%	<b>1.42%</b>	0.18%	0.00%	0.28%	0.31%	0.35%
Motor boating/Cruising	0.93%	<b>1.83%</b>	1.10%	1.05%	0.00%	0.00%	0.92%
Yacht cruising	0.51%	0.00%	<b>1.19%</b>	0.15%	0.31%	0.92%	0.52%
Power boating	0.51%	0.59%	0.38%	0.08%	0.80%	<b>1.83%</b>	0.51%
Small sail boat racing	0.18%	0.00%	0.00%	<b>0.23%</b>	0.23%	0.00%	0.17%
Canal boating	0.42%	0.36%	0.28%	<b>0.81%</b>	0.23%	0.00%	0.42%
Yacht racing	0.13%	0.00%	<b>0.54%</b>	0.00%	0.26%	0.00%	0.14%
None	94.18%	92.96%	94.85%	<b>96.37%</b>	96.19%	94.38%	94.39%
Base	10,301	246	740	663	392	220	12,562

Table 27 Participation by Ethnicity (participants)

Ethnic Origin							
	White British	White Irish	Other White background	Asian	Black	Mixed/ Other	Total
Any boating activity	<b>2,319,319</b>	68,398	150,220	101,465	60,595	51,944	2,751,941
Any sailboat activities/yacht cruising	<b>521,498</b>	7,243	44,445	8,007	8,621	8,475	598,290
Any sailboat racing/yacht racing	<b>108,737</b>	-	15,841	6,509	7,722	-	138,808
Motor boating / cruising or canal boating	<b>532,359</b>	21,233	40,248	46,668	3,635	-	644,144
Canoeing	<b>73,229</b>	-	-	6,509	3,590	-	83,328
Water skiing	<b>366,755</b>	7,243	9,764	3,792	3,635	5,582	396,772
Small sail boat activities	<b>50,949</b>	-	15,841	-	4,131	-	70,921
Rowing/Sculling	<b>201,862</b>	-	34,681	4,215	4,986	8,475	254,219
Windsurfing	<b>201,982</b>	5,768	11,200	2,373	12,715	16,907	250,945
Using personal watercraft	<b>369,735</b>	17,775	32,106	29,418	-	-	449,034
Motor boating/Cruising	<b>165,707</b>	3,458	8,141	22,741	3,635	-	203,682
Yacht cruising	<b>931,641</b>	16,479	46,404	20,143	14,086	27,374	1,056,127
Power boating	<b>144,221</b>	3,916	5,490	14,345	8,376	-	176,348
Small sail boat racing	<b>189,002</b>	-	22,320	8,034	8,333	5,897	233,586
Canal boating	<b>210,601</b>	-	28,224	10,731	16,598	6,150	272,305
Yacht racing	<b>143,811</b>	13,758	5,391	-	4,418	2,893	170,272
None	<b>37,531,917</b>	903,835	2,769,222	2,694,103	1,528,340	871,644	46,299,059
Base	10,301	246	740	663	392	220	12,562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## Participation by Working Status

- The participation rates of those 'in work' are higher for all activities except rowing/sculling, 'other non-working' groups have better maintained participation rates in this sport, which may be influenced by university rowing clubs.
- However those 'in work' show substantial falls in many activities, worst affected are power boating and small boat racing.
- Retired people are least active but have marginally increased their overall participation as a result in a growth of more boating and canoeing, in spite of the average retirement age increasing.

Table 28 Participation by Working Status (percentages)

	Working status			
	Working	Retired	Other non-working	Total UK
Any boating activity	<b>7.64%</b>	2.24%	4.52%	5.61%
Any sailboat activities/yacht cruising	<b>1.64%</b>	0.68%	0.82%	1.22%
Any sailboat racing/yacht racing	<b>0.35%</b>	0.19%	0.22%	0.28%
Motor boating / cruising or canal boating	<b>1.52%</b>	1.22%	0.95%	1.31%
Canoeing	<b>3.12%</b>	0.24%	1.97%	2.15%
Water skiing	<b>0.75%</b>	0.04%	0.65%	0.56%
Small sail boat activities	<b>1.10%</b>	0.43%	0.54%	0.81%
Rowing/Sculling	0.42%	0.09%	<b>0.51%</b>	0.36%
Windsurfing	<b>0.71%</b>	0.14%	0.29%	0.48%
Using personal watercraft	<b>0.59%</b>	0.00%	0.16%	0.35%
Motor boating/Cruising	<b>1.06%</b>	0.90%	0.60%	0.92%
Yacht cruising	<b>0.64%</b>	0.37%	0.41%	0.52%
Power boating	<b>0.73%</b>	0.11%	0.45%	0.51%
Small sail boat racing	<b>0.21%</b>	0.07%	0.19%	0.17%
Canal boating	<b>0.49%</b>	0.32%	0.35%	0.42%
Yacht racing	<b>0.18%</b>	0.15%	0.07%	0.14%
None	92.36%	<b>97.76%</b>	95.48%	94.39%
UK adult population	25,817,373	11,910,168	11,323,459	49,051,000
Unweighted Base	5,900	3,803	2,859	12,562

Table 29 Participation by Working Status (participants)

	Working status			
	Working	Retired	Other non-working	Total UK
Any boating activity	<b>1,973,318</b>	266,586	512,036	2,751,941
Any sailboat activities/yacht cruising	<b>424,208</b>	81,130	92,951	598,290
Any sailboat racing/yacht racing	<b>91,109</b>	22,261	25,438	138,808
Motor boating / cruising or canal boating	<b>391,925</b>	145,004	107,214	644,144
Canoeing	<b>804,634</b>	28,224	223,269	1,056,127
Water skiing	<b>194,179</b>	4,571	73,555	272,305
Small sail boat activities	<b>284,925</b>	50,650	61,197	396,772
Rowing/Sculling	<b>107,883</b>	10,810	57,656	176,348
Windsurfing	<b>183,996</b>	16,493	33,098	233,586
Using personal watercraft	<b>152,575</b>	-	17,697	170,272
Motor boating/Cruising	<b>274,257</b>	106,817	67,960	449,034
Yacht cruising	<b>164,537</b>	43,734	45,949	254,219
Power boating	<b>187,787</b>	12,612	50,546	250,945
Small sail boat racing	<b>53,285</b>	8,736	21,307	83,328
Canal boating	<b>126,241</b>	38,188	39,254	203,682
Yacht racing	<b>46,044</b>	17,434	7,444	70,921
None	<b>23,844,055</b>	11,643,582	10,811,423	46,299,059
UK adult population	25,817,373	11,910,168	11,323,459	49,051,000
Unweighted Base	5,900	3,803	2,859	12,562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## Participation by Life stage

- The following tables show the participation rates for the individual activities by life stage. The life stage definitions are defined as below.
- We have highlighted the highest participation rates (Table 30) and the largest absolute participation number (Table 31) in blue.

Figure 11 Life Stage Explanation

Life Stage	Definition
Student/Workers house share	Two or more adults not living as a couple, without children (up to the age of 54).
Single	One person living alone either single/widowed/divorced/separated.
Couple under 55	Two married or living as married no children and under 55.
Single parents	One parent with one child or several children in household.
Family	Household of 2 adults with children.
Empty nesters	Two people 55 to 65 living in house with no children
Greys	Two or more people over 64 living in house with no children or living alone and over 64

- 'Students/ Workers in a shared house' are the most active in 'any boating activity', particularly; canoeing, water skiing, rowing/sculling and using personal watercraft.
- Couples under 55 are the most active in yacht cruising and canal boating.
- Empty nesters have the highest participation for small sail boat activities, motor boating/cruising and small sail boat racing.
- When the size of each life stage group is taken into account the importance of families becomes very apparent, 34% of participants in any boating activity fall into the 'family' life stage.
- Water skiing is the only activity to show a higher volume of people coming from outside the family life stage with 5,000 more coming from the 'student/ workers in a shared house'.

Table 30 Participation by Life Stage (percentages)

	Life stage							Total UK
	Student/Workers house share	Single	Couple under 55	Family	Single parents	Empty nesters	Greys	
Any boating activity	<b>8.6%</b>	5.74%	7.86%	6.22%	5.90%	5.89%	1.30%	5.61%
Any sailboat activities/yacht cruising	1.5%	0.99%	1.73%	1.37%	1.15%	<b>2.01%</b>	0.36%	1.22%
Any sailboat racing/yacht racing	0.4%	<b>0.46%</b>	0.16%	0.35%	0.26%	0.36%	0.06%	0.28%
Motor boating / cruising or canal boating	1.2%	1.43%	1.69%	1.18%	1.31%	<b>2.74%</b>	0.72%	1.31%
Canoeing	<b>3.62%</b>	2.07%	3.43%	2.56%	2.76%	1.25%	0.07%	2.15%
Water skiing	<b>1.49%</b>	0.86%	0.91%	0.49%	0.51%	0.00%	0.00%	0.56%
Small sail boat activities	1.05%	0.62%	0.81%	0.86%	1.15%	<b>1.61%</b>	0.21%	0.81%
Rowing/Sculling	<b>0.88%</b>	0.61%	0.35%	0.42%	0.18%	0.00%	0.06%	0.36%
Windsurfing	0.86%	<b>0.98%</b>	0.40%	0.45%	0.62%	0.35%	0.03%	0.48%
Using personal watercraft	<b>0.63%</b>	0.34%	0.56%	0.49%	0.24%	0.00%	0.03%	0.35%
Motor boating/Cruising	0.96%	1.04%	0.86%	0.82%	0.96%	<b>1.99%</b>	0.55%	0.92%
Yacht cruising	0.62%	0.53%	<b>0.99%</b>	0.60%	0.00%	0.80%	0.18%	0.52%
Power boating	0.56%	<b>0.99%</b>	0.63%	0.57%	0.75%	0.00%	0.15%	0.51%
Small sail boat racing	0.27%	0.17%	0.07%	0.22%	0.17%	<b>0.36%</b>	0.00%	0.17%
Canal boating	0.25%	0.46%	<b>0.83%</b>	0.40%	0.36%	0.75%	0.17%	0.42%
Yacht racing	0.12%	<b>0.36%</b>	0.16%	0.15%	0.09%	0.10%	0.06%	0.14%
None	91.38%	94.26%	92.14%	93.78%	94.10%	94.11%	<b>98.70%</b>	94.39%
Base	1,257	1,304	1,184	3,522	1,115	956	3,223	12,561

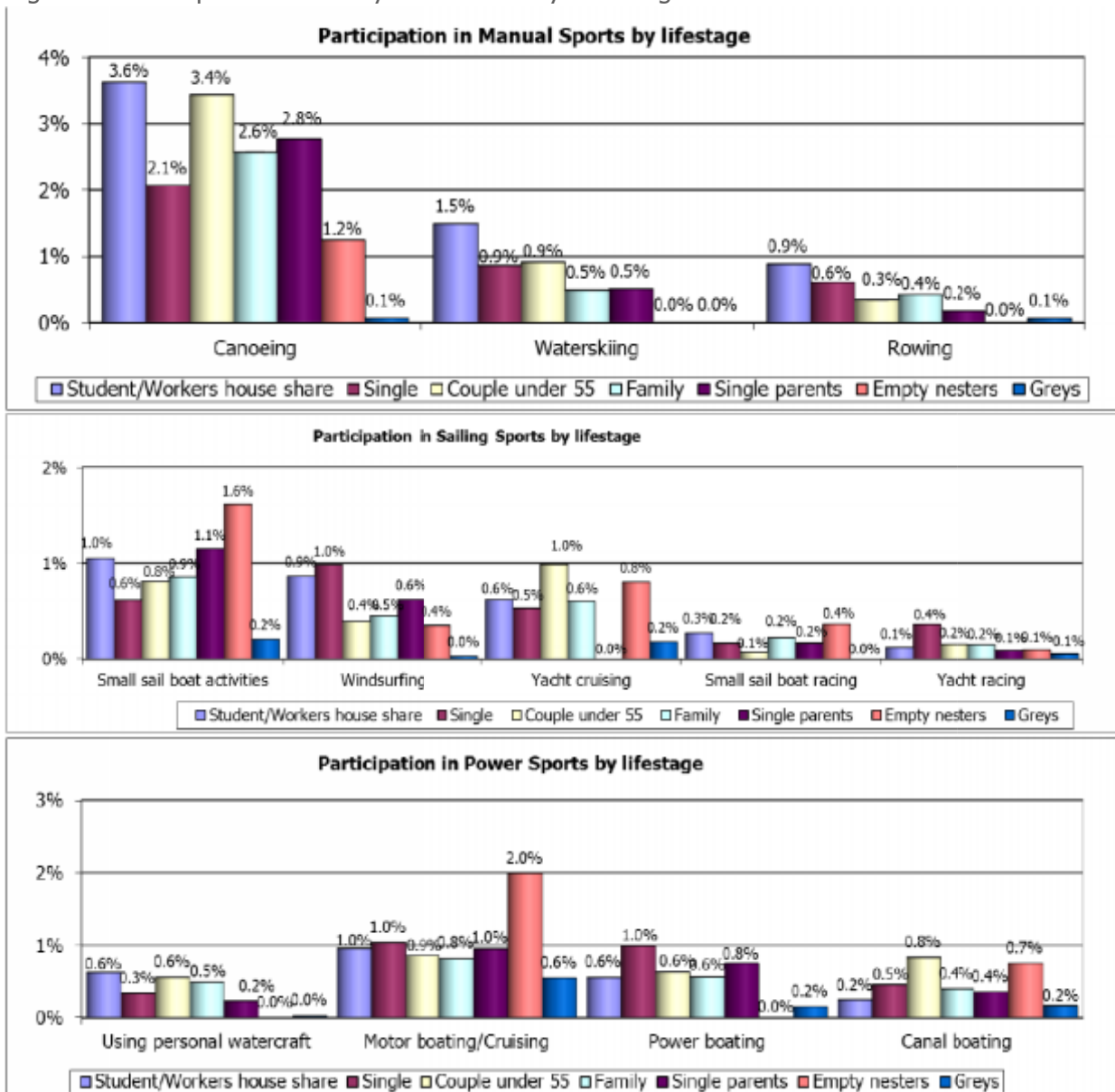
Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Table 31 Participation by Life Stage (participants)

	Life stage							Total UK
	Student/Workers house share	Single	Couple under 55	Family	Single parents	Empty nesters	Greys	
Any boating activity	468,269	305,026	413,136	<b>952,465</b>	260,515	230,657	121,873	2,751,941
Any sailboat activities/yacht cruising	82,378	52,704	90,730	<b>209,473</b>	50,710	78,857	33,438	598,290
Any sailboat racing/yacht racing	21,467	24,705	8,220	<b>53,306</b>	11,519	14,253	5,339	138,808
Motor boating / cruising or canal boating	65,699	76,272	88,974	<b>180,252</b>	57,949	107,167	67,831	644,144
Canoeing	196,630	109,830	180,292	<b>392,456</b>	122,003	48,801	6,114	1,056,127
Water skiing	<b>80,710</b>	45,832	47,916	75,361	22,485	-	-	272,305
Small sail boat activities	56,973	32,702	42,649	<b>131,182</b>	50,710	62,981	19,574	396,772
Rowing/Sculling	48,016	32,250	18,173	<b>64,243</b>	7,740	-	5,927	176,348
Windsurfing	46,974	52,286	20,787	<b>69,276</b>	27,457	13,767	3,039	233,586
Using personal watercraft	34,209	17,873	29,476	<b>75,502</b>	10,386	-	2,826	170,272
Motor boating/Cruising	52,128	55,119	45,216	<b>124,770</b>	42,201	77,822	51,779	449,034
Yacht cruising	33,760	28,198	51,890	<b>92,175</b>	-	31,480	16,717	254,219
Power boating	30,341	52,810	33,322	<b>86,734</b>	33,270	-	14,468	250,945
Small sail boat racing	14,865	8,802	3,809	<b>34,211</b>	7,388	14,253	-	83,328
Canal boating	13,572	24,235	43,758	<b>60,972</b>	15,748	29,345	16,053	203,682
Yacht racing	6,602	19,215	8,220	<b>23,505</b>	4,131	3,908	5,339	70,921
None	4,964,374	5,012,418	4,841,571	<b>14,352,045</b>	4,158,392	3,683,084	9,283,128	46,295,012
Base	1,257	1,304	1,184	3,522	1,115	956	3,223	12,561

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Figure 12 Participation in Surveyed Activities by Life Stage



Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## Regional Participation

### Participation by Residence - ITV Regions

ITV regions have been grouped to provide larger sample sizes and therefore more robust estimates of participation. However, the sample sizes in some of the grouped regions are still relatively small varying between 371 and 4,107. This means the statistics are less reliable than the national estimates.

We have highlighted participation rates where changes are statistically significant compared with 2009. The darker grey (or orange in colour copies) is used to indicate rises in the participation the lighter grey (or blue) to indicate an apparent decline. The numbers of respondents from each region are provided at the bottom of the table. The regions are defined as follows:

Figure 13 ITV Regions

London, South East and East England	South, South East, East and London ITV regions (covered by Meridian, LWT & Carlton and Anglia)
The West	Wales, South West and West ITV regions (covered by West country, HTV and Central)
Midlands	Midlands ITV region (covered by Central)
Northern England	North West, North East and Yorkshire ITV regions (covered by Granada, Yorkshire and Tyne Tees)
Scotland	Border and Scotland ITV regions (covered by Grampian, Scottish and Border)
Northern Ireland	Northern Ireland

- All grouped regions, with the exception of residents in Midlands and Northern Ireland, have shown a statistically significant decrease in any boating activity, sailboat activities and motor boating or canal cruising.
- Midlands and Northern Ireland show the exact opposite.
- Residents in Northern Ireland and the South West of England are the regions with the highest levels of participation in any boating activity. London and South East has declined substantially dropping from 1<sup>st</sup> to 4<sup>th</sup> position for participation in 2010 from 2009.

Table 32 Participation Rates by Residence –ITV Regions 2010 (percentages)

	ITV regions							All regions
	London/ South East	East/ South West	Wales/ West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland	Northern Ireland	
Any boating activity	5.74%	7.27%	6.63%	4.48%	3.37%	10.42%	5.61%	
Any sailboat activities/yacht cruising	1.50%	1.62%	1.27%	0.74%	1.01%	1.62%	1.22%	
Any sailboat racing/yacht racing	0.41%	0.38%	0.24%	0.24%	0.00%	0.00%	0.28%	
Motor boating / cruising or canal boating	1.23%	1.48%	1.51%	1.26%	0.57%	3.38%	1.31%	
Canoeing	2.22%	3.59%	2.81%	1.23%	1.56%	3.47%	2.15%	
Water skiing	0.59%	0.27%	0.68%	0.63%	0.31%	0.53%	0.56%	
Small sail boat activities	1.02%	1.33%	0.80%	0.39%	0.49%	1.62%	0.81%	
Rowing/Sculling	0.38%	0.73%	0.34%	0.31%	0.08%	0.27%	0.36%	
Windsurfing	0.58%	0.83%	0.41%	0.43%	0.10%	0.00%	0.48%	
Using personal watercraft	0.30%	0.16%	0.64%	0.25%	0.15%	1.52%	0.35%	
Motor boating/Cruising	0.91%	1.17%	0.74%	0.83%	0.57%	2.98%	0.92%	
Yacht cruising	0.68%	0.45%	0.54%	0.39%	0.52%	0.00%	0.52%	
Power boating	0.59%	0.77%	0.50%	0.34%	0.10%	1.59%	0.51%	
Small sail boat racing	0.15%	0.26%	0.24%	0.19%	0.00%	0.00%	0.17%	
Canal boating	0.35%	0.30%	0.80%	0.44%	0.00%	0.40%	0.42%	
Yacht racing	0.30%	0.19%	0.00%	0.09%	0.00%	0.00%	0.14%	
None	94.26%	92.73%	93.37%	95.52%	96.63%	89.58%	94.39%	
Base	4,107	1,302	2,022	3,613	1,147	371	12,562	

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)



For each activity the ITV region with the highest absolute number of participants has been highlighted in blue and bold in Table 33 .

- London, the South East and East of England have the highest number of participants across 9 of the 12 activities due to the large population in this region.
- The canal network round the Midlands means that this region has the highest volume of participants for canal boating.

Table 33 Participation Rates by Residence –ITV Regions 2010 (participants)

	ITV regions							All regions
	London/ East/ South East	Wales/ West/ South West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland	Northern Ireland		
Any boating activity	<b>947,848</b>	362,405	526,839	618,134	147,067	149,647	2,751,941	
Any sailboat activities/yacht cruising	<b>247,418</b>	80,679	100,847	101,964	44,114	23,268	598,290	
Any sailboat racing/yacht racing	<b>67,368</b>	18,724	19,045	33,671	-	-	138,808	
Motor boating / cruising or canal boating	<b>202,877</b>	73,643	119,769	174,617	24,671	48,568	644,144	
Canoeing	<b>366,412</b>	178,852	222,829	170,299	67,887	49,848	1,056,127	
Water skiing	<b>96,820</b>	13,329	54,255	86,552	13,667	7,681	272,305	
Small sail boat activities	<b>168,296</b>	66,130	63,511	54,031	21,536	23,268	396,772	
Rowing/Sculling	<b>63,110</b>	36,158	27,029	42,832	3,303	3,916	176,348	
Windsurfing	<b>95,981</b>	41,236	32,162	60,012	4,195	-	233,586	
Using personal watercraft	48,929	7,915	<b>50,930</b>	34,011	6,689	21,799	170,272	
Motor boating/Cruising	<b>149,916</b>	58,522	58,967	114,158	24,671	42,800	449,034	
Yacht cruising	<b>112,735</b>	22,604	42,854	53,450	22,577	-	254,219	
Power boating	<b>98,006</b>	38,535	39,965	47,207	4,411	22,822	250,945	
Small sail boat racing	25,443	12,882	19,045	<b>25,958</b>	-	-	83,328	
Canal boating	58,450	15,121	<b>63,884</b>	60,459	-	5,768	203,682	
Yacht racing	<b>49,146</b>	9,651	-	12,124	-	-	70,921	
None	<b>15,569,878</b>	4,621,410	7,413,519	13,194,551	4,212,839	1,286,863	46,299,059	
Base	4,107	1,302	2,022	3,613	1,147	371	12,562	

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

- In Table 34 we have combined the 2008 to 2010 samples to provide an aggregate estimate of participation rate over the last three years.
- Figure 14 below shows the average participation rates from 2008 to 2010 by residence region in a graphical format by activity.

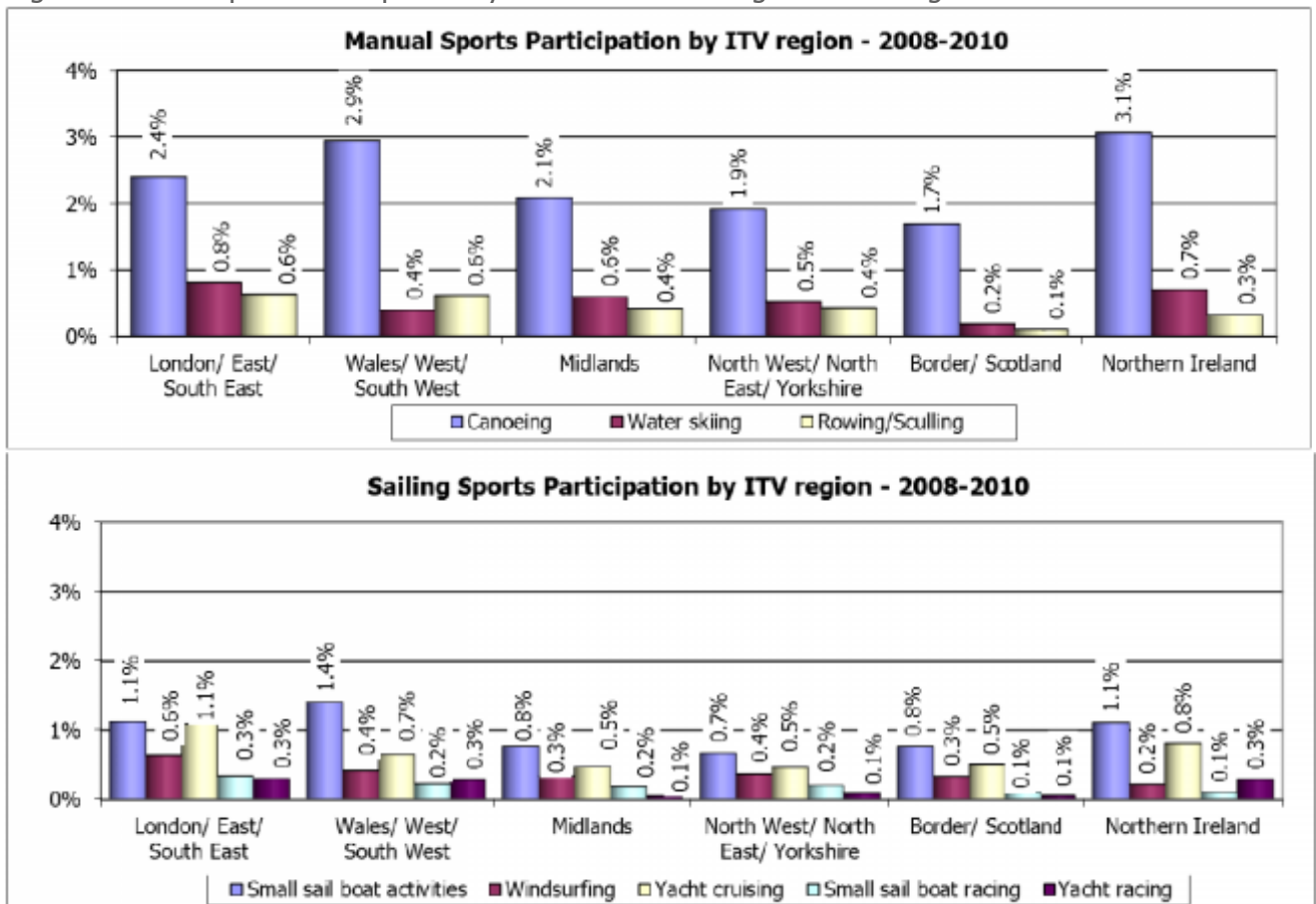
- Canoeing has the highest participation rates in residents of Northern Ireland and Wales and the South West.
- The South West residents show the highest participation for small sail boat activities.
- Powered sports have a higher participation in Northern Ireland with the exception of canal boating which has its highest participation for residents in the Midlands.

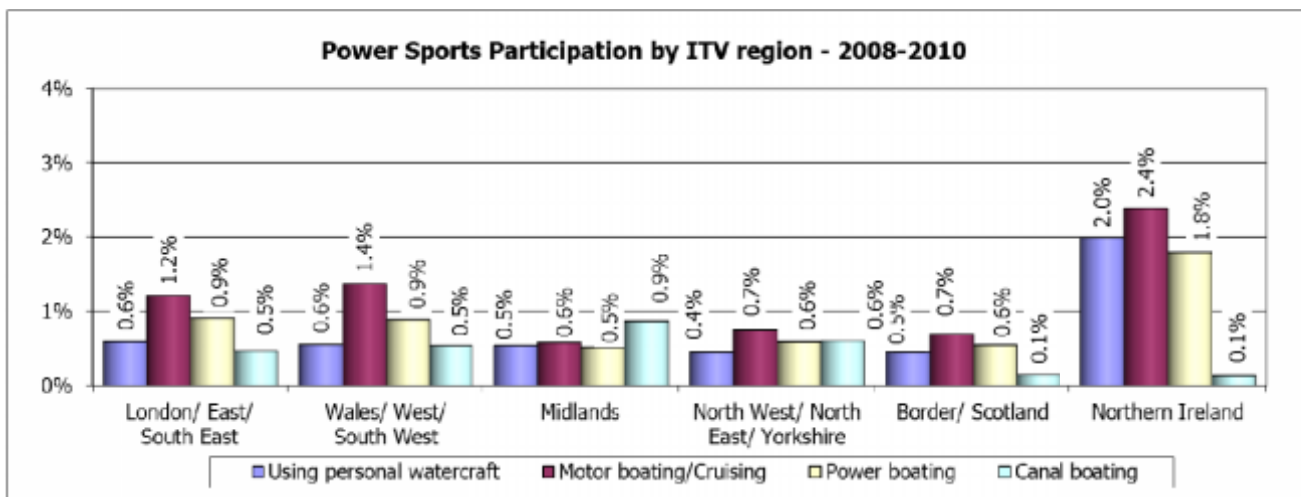
Table 34 Watersports Participation by Residence - ITV Regions– Average 2008-2010

Average 2008-2010	ITV region						
	London/ East/ South East	Wales/ West/ South West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland	Northern Ireland	All regions
Any boating activity	7.32%	7.46%	5.64%	5.30%	4.42%	10.00%	6.34%
Any sailboat activities/yacht cruising	2.04%	1.92%	1.19%	1.05%	1.16%	1.92%	1.54%
Any sailboat racing/yacht racing	0.57%	0.41%	0.23%	0.26%	0.11%	0.40%	0.37%
Motor boating / cruising or canal boating	1.65%	1.91%	1.42%	1.32%	0.84%	2.52%	1.50%
Canoeing	2.40%	2.95%	2.08%	1.92%	1.69%	3.06%	2.23%
Water skiing	0.81%	0.40%	0.60%	0.53%	0.19%	0.70%	0.60%
Small sail boat activities	1.12%	1.40%	0.77%	0.67%	0.77%	1.11%	0.94%
Rowing/Sculling	0.63%	0.62%	0.42%	0.43%	0.10%	0.32%	0.49%
Windsurfing	0.64%	0.42%	0.34%	0.37%	0.33%	0.23%	0.45%
Using personal watercraft	0.59%	0.56%	0.55%	0.45%	0.45%	1.99%	0.57%
Motor boating/Cruising	1.21%	1.37%	0.58%	0.75%	0.69%	2.39%	0.99%
Yacht cruising	1.09%	0.65%	0.47%	0.47%	0.51%	0.81%	0.72%
Power boating	0.91%	0.89%	0.51%	0.59%	0.55%	1.79%	0.75%
Small sail boat racing	0.34%	0.23%	0.19%	0.20%	0.11%	0.11%	0.24%
Canal boating	0.47%	0.54%	0.87%	0.61%	0.15%	0.13%	0.54%
Yacht racing	0.30%	0.29%	0.06%	0.09%	0.06%	0.29%	0.18%
Base	12,586	3,937	5,523	11,253	3,464	1,119	37,882

Source: Watersports Omnibus Surveys 2008 - 2010 (Base: all respondents – 37,882 adults aged 16+)

Figure 14 Watersports Participation by Residence - ITV regions – Average 2008-2010





Source: Watersports Omnibus Surveys 2008 - 2010 (Base: all respondents – 37,882 adults aged 16+)

### Participation by Residence - Postal Area

In addition to the participation by residence in ITV region tables, we have also added the following tables, showing the participation rates in the various activities for respondents living in different postal areas. The regions are made of the following postal areas.

As with the tables showing participation by ITV regions the sample sizes in some of the regions are still relatively small varying between 364 and 1,901. This means the statistics are less reliable than the national estimates. The region with the largest participation rate (Table 36) and the largest absolute participant number (Table 37) in each activity are highlighted in blue.

Table 35 Postcode Regions

Region	Postcode Area
South	SO, PO, GU, BN, RH
South East	CT, TN, ME, SS, CM, SG, AL, LU, HP, SL, MK, OX, RG
London	KT, TW, UB, HA, WD, EN, IG, RM, DA, BR, CR, SM, SW, W, NW, N, E, SE, WC, EC
South West	TR, PL, TQ, EX, TA, DT, BA, BS, GL, SN, SP, BH
North East	DL, TS, DH, SR, NE
North West	CW, CH, SK, WA, L, WN, M, OL, BL, PR, FY, BB, LA, CA
Yorkshire	S, WF, LS, DN, HU, YO, HG, BD, HX, HD
West Midlands	B, WR, HR, DY, WV, TF, ST, WS, DE, CV
East Midlands	NN, PE, LE, NG, LN
East	CO, CB, IP, NR
Scotland	DG, TD, EH, ML, KA, PA, G, FK, KY, DD, PH, HS, IV, AB, KW, ZE
Wales	SA, CF, NP, LD, SY, LL
Northern Ireland	BT

- Activities involving sailing have the highest participation in residents in the South which is common with previous years.
- Northern Irish residents have the highest participation rate for any boating activity, largely driven by the higher rates for motor boating/ cruising, using personal watercraft and power boating.
- Welsh residents have the highest rates for canoeing and windsurfing.
- When taking the population of the various regions into account the importance of London becomes apparent. Residents of London record the highest absolute number of participants for 5 out of the 12 boating activities.

Table 36 Participation Rates by Residence Regions based on Postal Area (percentages)

	Postcode Area														Total UK
	South	South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East	Scotland	Wales	Ireland	Northern	
Any boating activity	8.7%	6.4%	4.8%	7.9%	4.3%	4.4%	4.7%	5.3%	7.1%	4.3%	3.0%	6.5%	<b>10.4%</b>	5.6%	
Any sailboat activities/yacht cruising	<b>3.1%</b>	1.4%	1.0%	2.6%	0.0%	0.6%	0.8%	1.1%	1.7%	1.0%	0.9%	0.9%	1.6%	1.2%	
Any sailboat racing/yacht racing	<b>0.8%</b>	0.3%	0.4%	0.5%	0.2%	0.3%	0.1%	0.2%	0.2%	0.0%	0.0%	0.2%	0.0%	0.3%	
Motor boating / cruising or canal boating	1.8%	1.4%	1.1%	1.6%	0.4%	1.1%	1.9%	1.1%	2.2%	1.1%	0.6%	0.9%	<b>3.4%</b>	1.3%	
Canoeing	3.4%	3.0%	1.5%	3.1%	1.6%	1.4%	1.2%	1.9%	3.2%	1.8%	1.2%	<b>3.8%</b>	3.5%	2.2%	
Water skiing	0.6%	0.7%	0.8%	0.6%	<b>1.0%</b>	0.7%	0.3%	0.5%	0.3%	0.0%	0.3%	0.4%	0.5%	0.6%	
Small sail boat activities	<b>2.2%</b>	1.1%	0.6%	2.0%	0.0%	0.2%	0.6%	0.7%	1.1%	0.7%	0.4%	0.3%	1.6%	0.8%	
Rowing/Sculling	0.7%	0.2%	0.4%	<b>0.9%</b>	0.0%	0.3%	0.6%	0.5%	0.2%	0.4%	0.1%	0.0%	0.3%	0.4%	
Windsurfing	1.0%	0.4%	0.7%	0.8%	0.5%	0.4%	0.5%	0.2%	0.1%	0.3%	0.1%	<b>1.1%</b>	0.0%	0.5%	
Using personal watercraft	0.4%	0.4%	0.4%	0.2%	0.3%	0.3%	0.2%	0.8%	0.0%	0.0%	0.2%	0.2%	<b>1.5%</b>	0.3%	
Motor boating/Cruising	1.3%	1.2%	0.7%	1.2%	0.4%	0.7%	1.0%	0.5%	1.1%	0.7%	0.6%	0.9%	<b>3.0%</b>	0.9%	
Yacht cruising	<b>1.4%</b>	0.4%	0.5%	0.8%	0.0%	0.4%	0.2%	0.4%	1.0%	0.7%	0.5%	0.5%	0.0%	0.5%	
Power boating	0.8%	0.5%	0.8%	0.7%	0.5%	0.4%	0.3%	0.2%	0.3%	0.0%	0.1%	0.9%	<b>1.6%</b>	0.5%	
Small sail boat racing	0.2%	0.2%	0.1%	<b>0.4%</b>	0.2%	0.3%	0.0%	0.2%	0.2%	0.0%	0.0%	0.2%	0.0%	0.2%	
Canal boating	0.6%	0.3%	0.4%	0.4%	0.0%	0.4%	0.8%	0.6%	<b>1.1%</b>	0.3%	0.0%	0.0%	0.4%	0.4%	
Yacht racing	<b>0.8%</b>	0.2%	0.3%	0.2%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	
None	91.3%	93.6%	95.2%	92.1%	95.7%	95.6%	95.3%	94.7%	92.9%	95.7%	<b>97.0%</b>	93.5%	89.6%	94.4%	
Base	560	1,372	1,901	1,088	577	1,484	1,190	1,150	769	364	1,083	648	371	12,557	

Table 37 Participation Rates by Residence Regions based on Postal Area (participants)

	Postcode Area														Total UK
	South	South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East	Scotland	Wales	Ireland	Northern	
Any boating activity	190,022	362,216	<b>372,238</b>	327,495	94,431	249,709	210,324	231,830	212,310	59,753	123,869	168,095	149,647	2,751,941	
Any sailboat activities/yacht cruising	66,622	79,622	75,534	<b>106,322</b>	0	36,824	35,906	48,590	51,693	14,658	37,322	21,928	23,268	598,290	
Any sailboat racing/yacht racing	18,069	18,797	<b>33,260</b>	20,726	4,258	19,938	4,411	9,004	5,517	0	0	4,827	0	138,808	
Motor boating / cruising or canal boating	39,632	81,588	82,424	64,349	8,650	61,171	<b>83,144</b>	46,450	65,592	15,157	24,671	22,747	48,568	644,144	
Canoeing	73,618	<b>168,551</b>	113,701	129,510	34,695	79,772	53,318	81,831	97,138	24,853	51,480	97,812	49,848	1,056,127	
Water skiing	12,950	38,480	<b>59,711</b>	24,363	22,354	41,292	12,194	20,015	8,778	0	13,667	10,818	7,681	272,305	
Small sail boat activities	47,349	60,916	47,486	<b>81,940</b>	0	12,177	25,978	29,385	33,885	9,141	17,408	7,839	23,268	396,772	
Rowing/Sculling	14,447	9,842	32,714	<b>36,158</b>	0	17,661	25,170	20,561	6,468	6,107	3,303	0	3,916	176,348	
Windsurfing	21,559	20,331	<b>55,490</b>	32,224	11,000	24,548	21,112	9,181	3,352	3,547	4,195	27,047	0	233,586	
Using personal watercraft	8,301	22,082	29,525	7,915	7,706	15,589	10,716	<b>34,625</b>	0	0	6,689	5,324	21,799	170,272	
Motor boating/Cruising	27,255	<b>68,587</b>	53,565	49,229	8,650	40,267	46,929	20,130	33,836	10,369	24,671	22,747	42,800	449,034	
Yacht cruising	31,267	22,018	<b>41,783</b>	32,437	0	24,648	9,928	19,205	28,842	10,088	19,914	14,089	0	254,219	
Power boating	17,275	26,026	<b>60,858</b>	28,590	10,178	25,555	11,473	9,361	9,994	0	4,411	24,403	22,822	250,945	
Small sail boat racing	3,908	12,900	11,392	14,885	4,258	<b>16,635</b>	0	9,004	5,517	0	0	4,827	0	83,328	
Canal boating	12,378	16,083	34,349	15,121	0	20,904	<b>36,215</b>	26,320	31,756	4,788	0	0	5,768	203,682	
Yacht racing	18,069	9,209	<b>21,868</b>	9,651	0	7,713	4,411	0	0	0	0	0	0	70,921	
None	1,984,257	5,287,084	<b>7,323,826</b>	3,800,914	2,117,226	5,482,744	4,281,061	4,178,166	2,798,370	1,345,588	3,996,506	2,400,648	1,286,863	46,283,251	
Base	560	1,372	1,901	1,088	577	1,484	1,190	1,150	769	364	1,083	648	371	12,557	

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## 5. Participation by Socio-Demographic Groups Using Combined Categories

### Combined Categories

We have compared participation figures from 2010 with the figures from the 2009 report. Significant rises are highlighted with an orange background (or darker grey in black and white copies) and significant falls are highlighted with a light blue background (or light grey in black and white copies).

Table 40 shows the difference in percentage points between 2010 and 2009 participation rates in the boating and watersport categories by socio-demographics.

- As in previous years, males, 16-34 year olds and those belonging to the AB social-economic grouping record the highest participation rates.
- Residents of Northern Ireland have returned to having the highest participation rate for any boating activity after moving into second place last year.
- Midlands residents have recorded a statistically significant increase in participation for 'Any boating activity' and in the manual boating category, largely due to an increase in canoe participation.
- Only manual sports have not shown a statistically significant decline in overall participation.

Table 38 Socio-Demographic Participation by Category (percentages)

		Watersport category				UK Population	Base
		Any boating activity	Sail	Power	Manual		
<b>Sex</b>	Male	7.33%	2.42%	2.43%	3.72%	23,806,412	5,983
	Female	3.99%	1.07%	1.56%	2.05%	25,244,588	6,579
<b>Age Group</b>	16-34	7.25%	2.00%	2.36%	4.25%	14,962,681	3,490
	35-54	6.81%	2.05%	2.14%	3.84%	17,179,159	3,991
	55+	2.94%	1.16%	1.49%	0.63%	16,909,160	5,081
<b>SEG</b>	AB	10.93%	3.85%	3.84%	5.39%	9,464,079	2,174
	C1	6.64%	1.99%	2.04%	3.77%	14,860,558	3,350
	C2DE	2.96%	0.76%	1.24%	1.35%	24,726,364	7,038
<b>Working status</b>	Working	7.64%	2.36%	2.56%	4.04%	25,817,373	5,900
	Retired	2.24%	0.85%	1.27%	0.33%	11,910,168	3,803
	Other non-working	4.52%	1.21%	1.42%	2.84%	11,323,459	2,859
<b>ITV regions</b>	London/ East/ South East	5.74%	2.11%	1.88%	2.98%	16,517,725	4,107
	Wales/ West/ South West	7.27%	2.29%	2.16%	4.28%	4,983,815	1,302
	Midlands	6.63%	1.74%	2.41%	3.46%	7,940,358	2,022
	North West/ North East/ Yorkshire	4.48%	1.30%	1.76%	2.03%	13,812,685	3,613
	Border/ Scotland	3.37%	1.01%	0.82%	1.95%	4,359,906	1,147
<b>Life stage</b>	Northern Ireland	10.42%	1.62%	5.93%	4.00%	1,436,510	371
	Student/Workers house share	8.62%	2.52%	2.40%	5.27%	5,432,643	1,257
	Single	5.74%	2.13%	2.40%	3.14%	5,317,443	1,304
	Couple under 55	7.86%	1.96%	2.63%	4.52%	5,254,707	1,184
	Family	6.22%	1.90%	1.98%	3.29%	15,304,510	3,522
	Single parents	5.90%	1.79%	2.01%	3.37%	4,418,907	1,115
	Empty nesters	5.89%	2.24%	2.74%	1.25%	3,913,741	956
	Greys	1.30%	0.39%	0.84%	0.13%	9,405,001	3,223
<b>Total</b>	Total	5.61%	1.73%	1.98%	2.86%	49,051,000	12,561

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Table 39 Socio-Demographic Participation by Category (participants)

		Watersport category				UK Population	Base
		Any boating activity	Sail	Power	Manual		
<b>Sex</b>	Male	1,744,457	576,587	578,417	885,965	23,806,412	5,983
	Female	1,007,484	270,302	395,011	518,135	25,244,588	6,579
<b>Age Group</b>	16-34	1,084,645	299,284	353,753	636,599	14,962,681	3,490
	35-54	1,169,678	351,494	367,395	660,499	17,179,159	3,991
	55+	497,618	196,111	252,279	107,002	16,909,160	5,081
<b>SEG</b>	AB	1,034,458	364,398	363,573	509,713	9,464,079	2,174
	C1	986,091	295,201	303,300	560,970	14,860,558	3,350
	C2DE	731,391	187,289	306,554	333,417	24,726,364	7,038
<b>Working status</b>	Working	1,973,318	608,385	660,872	1,043,757	25,817,373	5,900
	Retired	266,586	101,053	151,499	38,721	11,910,168	3,803
	Other non-working	512,036	137,451	161,056	321,621	11,323,459	2,859
<b>ITV regions</b>	London/ East/ South East	947,848	347,807	309,872	492,692	16,517,725	4,107
	Wales/ West/ South West	362,405	113,997	107,792	213,102	4,983,815	1,302
	Midlands	526,839	138,526	191,466	274,990	7,940,358	2,022
	North West/ North East/ Yorkshire	618,134	179,177	243,408	280,960	13,812,685	3,613
	Border/ Scotland	147,067	44,114	35,770	84,857	4,359,906	1,147
<b>Life stage</b>	Northern Ireland	149,647	23,268	85,120	57,497	1,436,510	371
	Student/Workers house share	468,269	137,109	130,250	286,323	5,432,643	1,257
	Single	305,026	113,405	127,363	166,807	5,317,443	1,304
	Couple under 55	413,136	102,903	138,393	237,767	5,254,707	1,184
	Family	952,465	290,146	302,643	503,489	15,304,510	3,522
	Single parents	260,515	78,983	88,604	148,873	4,418,907	1,115
	Empty nesters	230,657	87,740	107,167	48,801	3,913,741	956
Greys	121,873	36,604	79,008	12,040	9,405,001	3,223	
<b>Total</b>	Total	2,751,941	846,889	973,427	1,404,100	49,046,953	12,561

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Table 40 Changes in participation by Socio-Demographic Participation by Category - 2009 to 2010

		Any boating activity			
		Sail	Power	Manual	
<b>Sex</b>	Male	-1.83	-0.95	-1.47	-0.71
	Female	-1.38	-0.38	-0.85	-0.56
<b>Age Group</b>	16-34	-2.88	-0.81	-1.88	-1.70
	35-54	-1.83	-0.86	-1.70	-0.04
	55+	-0.24	-0.32	0.05	-0.32
<b>SEG</b>	AB	-1.27	-1.18	-1.44	-0.32
	C1	-1.83	-0.51	-1.29	-0.78
	C2DE	-1.53	-0.51	-0.93	-0.65
<b>Working status</b>	Working	-2.23	-0.90	-1.78	-0.78
	Retired	0.05	-0.26	0.06	-0.21
	Other non-working	-1.90	-0.55	-1.01	-0.75
<b>ITV regions</b>	London/ East/ South East	-3.19	-1.38	-1.67	-1.43
	Wales/ West/ South West	-0.46	-0.43	-1.76	0.56
	Midlands	1.17	0.16	0.10	0.76
	North West/ North East/ Yorkshire	-1.72	-0.28	-1.04	-1.02
	Border/ Scotland	-2.45	-0.98	-1.73	-0.66
<b>Life stage</b>	Northern Ireland	2.05	-0.04	0.95	0.86
	Student/Workers house share	-3.75	-1.02	-1.73	-3.02
	Single	-0.90	-0.57	-0.69	0.47
	Couple under 55	-2.82	-1.40	-2.33	-0.42
	Family	-1.56	-0.61	-1.50	-0.34
	Single parents	-1.75	-0.29	-1.45	-0.94
	Empty nesters	-0.24	-0.53	-0.30	-0.53
Greys	-0.43	-0.38	-0.05	-0.15	
<b>Total</b>	Total	-1.59	-0.66	-1.15	-0.63

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## Combined Categories by Postal Regions

Table 41 and Table 42 show the participation rates and absolute numbers of participants for the regions which are created using the postal area of a respondent's address. As in the previous tables in this section significant rises compared to 2009 are highlighted with an orange background and significant drops with a blue background.

- Wales is the only region to show a statistically significant increase in residents participating in "Any boating activity" largely driven by canoeing in the manual sports category.
- East Midlands residents are also showing a statistically significant increase in the manual watersports category, the results of increasing participation levels from 1.8% in 2009 to 3.2% in canoeing
- However nationally, all sports categories are showing a decline, which is statistically significant for sailing and power sports.
- The South and the South West residents record the highest participation for sailing activities, common with previous years.
- London residents record the highest absolute numbers of participants in the sailing and powered sports category due to the population size in this region.
- Manual sports have the highest number of participants from residents in the South East region.

Table 41 Regional Participation by Category (percentage)

	Any boating activity	Sail	Power	Manual	UK population	Base size	
Regions based on postal areas	South	8.7%	3.6%	2.6%	4.1%	2,174,279	560
	South East	6.4%	1.9%	2.0%	3.7%	5,649,300	1,372
	London	4.8%	1.8%	1.9%	2.5%	7,696,064	1,901
	South West	7.9%	3.4%	2.1%	4.1%	4,128,408	1,088
	North East	4.3%	0.7%	1.2%	2.6%	2,211,657	577
	North West	4.4%	1.3%	1.6%	2.2%	5,732,453	1,484
	Yorkshire	4.7%	1.2%	2.3%	1.9%	4,491,384	1,190
	West Midlands	5.3%	1.4%	2.0%	2.4%	4,409,997	1,150
	East Midlands	7.1%	1.8%	2.5%	3.5%	3,010,680	769
	East	4.3%	1.3%	1.1%	2.2%	1,405,341	364
	Scotland	3.0%	0.9%	0.9%	1.7%	4,120,375	1,083
	Wales	6.5%	1.7%	1.8%	4.2%	2,568,743	648
	Northern Ireland	10.4%	1.6%	5.9%	4.0%	1,436,510	371
Total	5.6%	1.7%	2.0%	2.9%	49,046,953	12,557	

Table 42 Regional Participation by Category (participants)

	Any boating activity	Sail	Power	Manual	UK population	Base size	
Regions based on postal areas	South	190,022	77,423	56,907	89,021	2,174,279	560
	South East	362,216	108,929	115,403	210,864	5,649,300	1,372
	London	372,238	139,971	144,481	190,479	7,696,064	1,901
	South West	327,495	140,353	88,553	169,658	4,128,408	1,088
	North East	94,431	15,258	26,535	57,049	2,211,657	577
	North West	249,709	72,290	89,888	126,155	5,732,453	1,484
	Yorkshire	210,324	53,978	105,333	84,532	4,491,384	1,190
	West Midlands	231,830	62,178	87,543	104,888	4,409,997	1,150
	East Midlands	212,310	55,045	75,586	105,916	3,010,680	769
	East	59,753	18,206	15,157	30,960	1,405,341	364
	Scotland	123,869	37,322	35,770	68,450	4,120,375	1,083
	Wales	168,095	42,667	47,150	108,629	2,568,743	648
	Northern Ireland	149,647	23,268	85,120	57,497	1,436,510	371
Total	2,751,941	846,889	973,427	1,404,100	49,046,953	12,557	

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

## 6. The Balance of Participation in UK and Abroad

Table 43 shows the changes in the proportion of people carrying out any participation in the UK and abroad from 2009 to 2010. Significant rises are highlighted in red and bold, significant drops in blue and bold.

- Two activities have statistically significant changes in the proportion of people carrying out the activity in the UK. Windsurfing has increased while using personal watercraft has decreased.
- Last year water skiing was more popular abroad than in the UK but this has been reversed in 2010.
- Water skiing participation abroad has decreased by a similar level to the increase in using personal watercraft, perhaps suggesting a transfer of interests or opportunities.

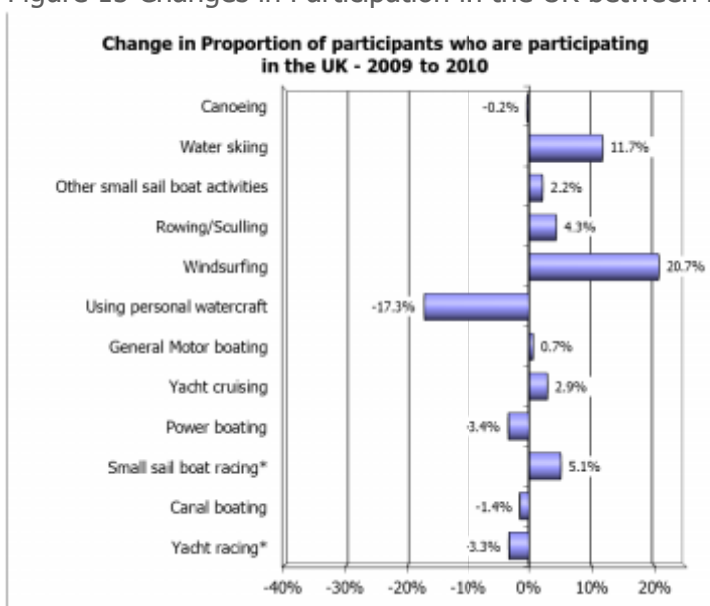
Table 43 Changes in the Location of Participation 2009 to 2010

	Proportion of participants participating in							Base 2010	Base 2009
	UK			Abroad					
	Change	2010	2009	Change	2010	2009			
Canoeing	-0.2%	79.7%	79.9%	2.2%	35.9%	33.6%	226	270	
Water skiing	11.7%	72.2%	60.5%	-10.3%	54.6%	64.9%	59	69	
Other small sail boat activities	2.2%	82.1%	79.9%	-7.2%	35.1%	42.3%	88	123	
Rowing/Sculling	4.3%	94.5%	90.1%	-11.1%	18.8%	30.0%	38*	75	
Windsurfing	<b>20.7%</b>	81.0%	60.3%	-14.6%	47.8%	62.3%	50*	58	
Using personal watercraft	<b>-17.3%</b>	42.7%	60.0%	13.1%	71.7%	58.6%	38*	71	
General Motor boating	0.7%	76.1%	75.4%	-7.6%	35.0%	42.7%	107	110	
Yacht cruising	2.9%	75.3%	72.3%	-9.5%	38.7%	48.2%	59	90	
Power boating	-3.4%	63.9%	67.2%	2.8%	48.9%	46.1%	58	123	
Small sail boat racing*	5.1%	94.7%	89.6%	-10.2%	27.8%	38.0%	19*	33*	
Canal boating	-1.4%	96.5%	98.0%	-3.3%	8.1%	11.4%	48*	77	
Yacht racing*	-3.3%	93.8%	97.0%	-21.8%	22.6%	44.3%	18*	21*	

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Figure 15 Changes in Participation in the UK between 2009 and 2010



Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)



\*Caution: small base size

Table 44 shows the proportion of respondents from 2003 to 2010 in each of the 12 'any boating activities' who said that at least some of their participation is taking place in the UK.

Figure 16 shows these trends in graphical format for the different groups of activities: sail, manual and power sports. From 2005 the overall sample includes Northern Ireland, which needs to be taken into account when comparing figures across the years.

It should be noted that the following tables and charts are amongst participants in the various sports, which have shown a decrease in participation, and the UK and abroad participation is not mutually exclusive; i.e. someone may have participated in the UK and abroad.

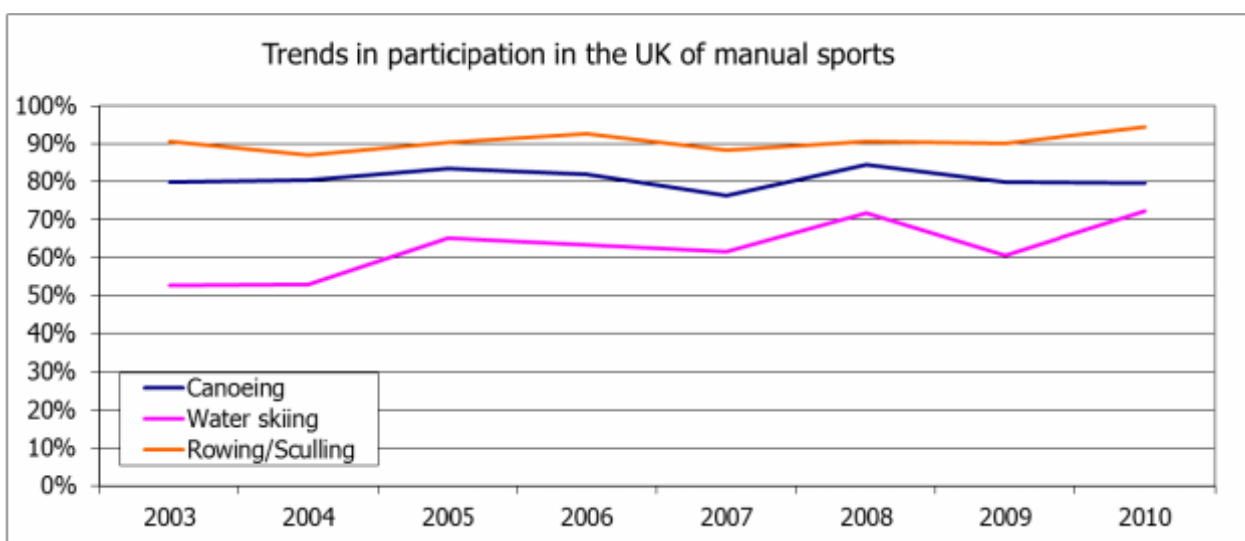
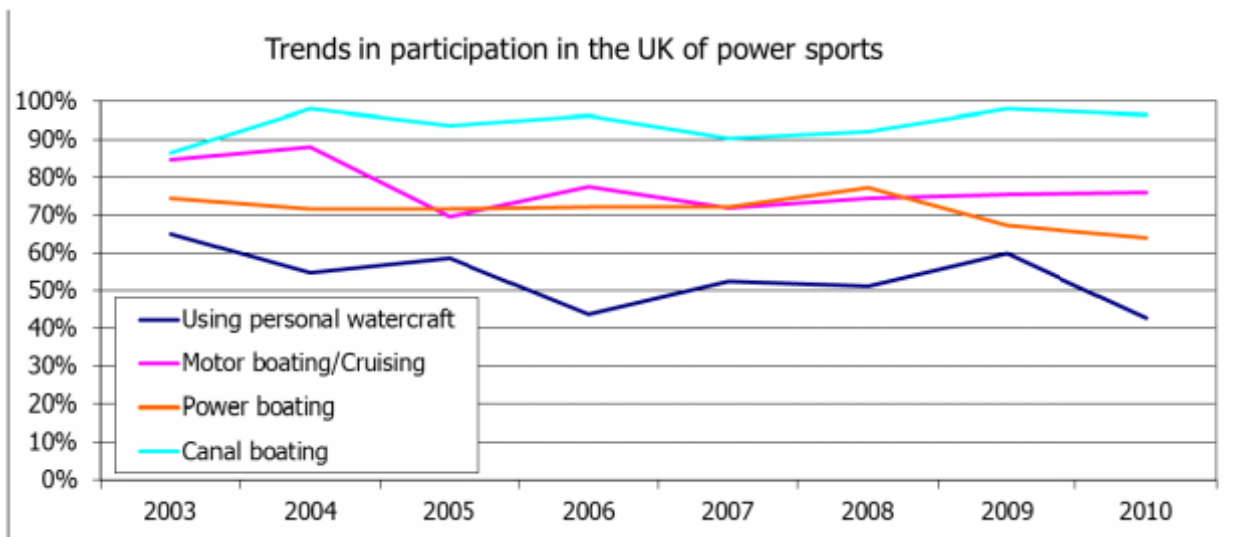
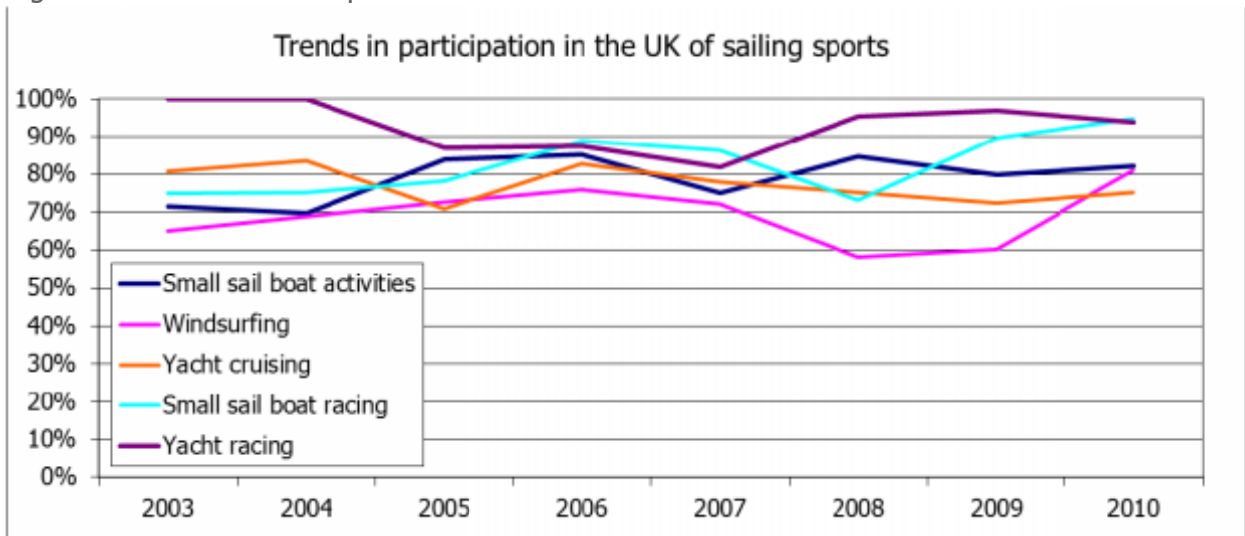
Table 44 Trends in Participation in the UK 2003-2010

	2003	2004	2005	2006	2007	2008	2009	2010
Any boating activity	81.0%	77.4%	78.6%	74.6%	78.7%	78.7%	79.1%	80.1%
Sailing Sports								
Small sail boat activities	71.6%	69.7%	83.9%	85.2%	75.1%	84.8%	79.9%	82.1%
Windsurfing	65.0%	68.8%	72.6%	76.0%	72.1%	58.1%	60.3%	81.0%
Yacht cruising	80.9%	83.7%	71.0%	82.9%	78.1%	75.3%	72.3%	75.3%
Small sail boat racing	74.9%	75.1%	78.2%	88.8%	86.4%	73.3%	89.6%	94.7%
Yacht racing	100.0%	100.0%	87.1%	87.6%	81.9%	95.5%	97.0%	93.8%
Power Sports								
Using personal watercraft	64.9%	54.7%	58.7%	43.9%	52.5%	51.1%	60.0%	42.7%
Motor boating/Cruising	84.8%	88.0%	69.5%	77.6%	71.9%	74.6%	75.4%	76.1%
Power boating	74.5%	71.6%	71.6%	72.1%	72.3%	77.2%	67.2%	63.9%
Canal boating	86.4%	98.0%	93.7%	96.3%	90.4%	92.1%	98.0%	96.5%
Manual Sports								
Canoeing	79.9%	80.5%	83.6%	82.1%	76.3%	84.5%	79.9%	79.7%
Water skiing	52.7%	52.8%	65.0%	63.4%	61.6%	71.7%	60.5%	72.2%
Rowing/Sculling	90.8%	87.1%	90.3%	92.6%	88.3%	90.6%	90.1%	94.5%

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

- Sailing sports are seeing an increase in UK participation among those people participating in the sport. The only sport in this category to show a slight decline is yacht racing.
- Motor boating/cruising continues its upward trend after declining in 2007 but other powered sports are declining for UK participation.
- Canoeing and rowing/sculling remain steady over the years for UK participation while water skiing fluctuates. In 2010 water skiing is showing the highest level of participation in the UK among its participants.

Figure 16 Trends in Participation in the UK 2003-2010

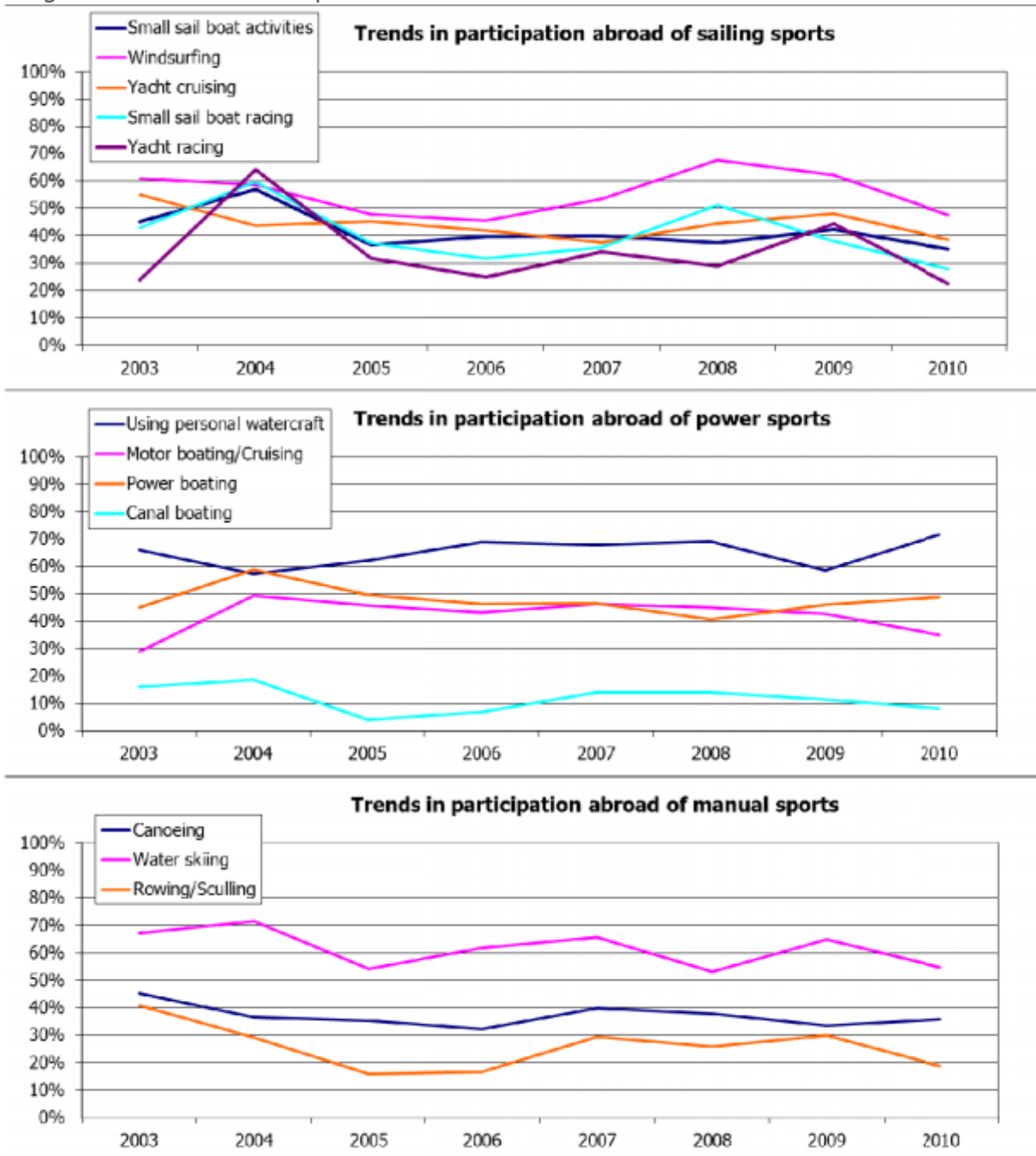


Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

- Sailing sports are seeing a decrease in participation abroad among those people participating in the sport.
- Motor boating/cruising and canal boating are declining in participation abroad.
- Power boating and using personal watercraft are showing an increase in participation levels abroad compared to last year.
- Canoeing has remained relatively steady since 2006 for participation abroad.
- Much of the abroad participation decline is likely due to a decrease in the volume of overseas holidays in 2010 compared to 2009.

Figure 17 Trends in Participation Abroad 2003-2010



Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

For the 12 original boating and watersport activities we are able to examine where the balance of people's participation is taking place. This set of results is derived from bringing together each person's reported activity in both the UK and abroad. Their activities are then categorised into six groups to show where each person is doing their sport.

UK only	Only participated in UK
High in UK low abroad	Participated more than 5 times in UK and less than 6 times abroad.
Low in UK and abroad	Less than 6 times in UK and abroad.
High in UK and abroad	More than 5 times in UK and abroad.
Low in UK and high abroad	Participated less than 6 times in UK and more than 5 times abroad.
Abroad only	Only participated abroad.

The data is presented as a table and pie charts for each activity. It should be borne in mind that the numbers of people interviewed for some sports are small and therefore the data should only be taken as indicative of the overall patterns of participation.

- The majority of activities take part in the UK only.
- Two activities are more common for participation abroad – water skiing and using personal watercraft.
- In line with the reduction in overseas holidays, many of the activities that are likely to be done overseas are showing an increase for UK participation at the expense of overseas participation; e.g. water skiing, windsurfing and small sail boat activities.

Table 45 Where Participation is Taking Place - 2010

	UK only	High in UK low abroad	Low in UK and Abroad	High in UK and Abroad	Low in UK and high Abroad	Abroad only	Base
Canoeing	64.1%	3.0%	11.5%	1.0%	0.0%	20.3%	226
Water skiing	45.4%	7.6%	15.8%	2.0%	1.5%	27.8%	59
Small sail boat activities	64.9%	3.7%	11.7%	1.8%	0.0%	17.9%	88
Rowing/Sculling	81.2%	3.7%	7.6%	2.0%	0.0%	5.5%	38*
Windsurfing	52.2%	9.2%	15.6%	4.0%	0.0%	19.0%	50*
Using personal watercraft	28.3%	0.0%	12.2%	2.1%	0.0%	57.3%	38*
Motor boating/Cruising	65.0%	3.6%	6.2%	0.7%	0.6%	23.9%	107
Yacht cruising	61.3%	0.9%	8.3%	3.6%	1.2%	24.7%	59
Power boating	51.1%	3.3%	6.1%	1.2%	2.2%	36.1%	58
Small sail boat racing	72.2%	4.6%	13.7%	4.3%	0.0%	5.3%	19*
Canal boating	91.9%	0.0%	4.6%	0.0%	0.0%	3.5%	48*
Yacht racing	77.4%	6.2%	10.1%	0.0%	0.0%	6.2%	18*

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

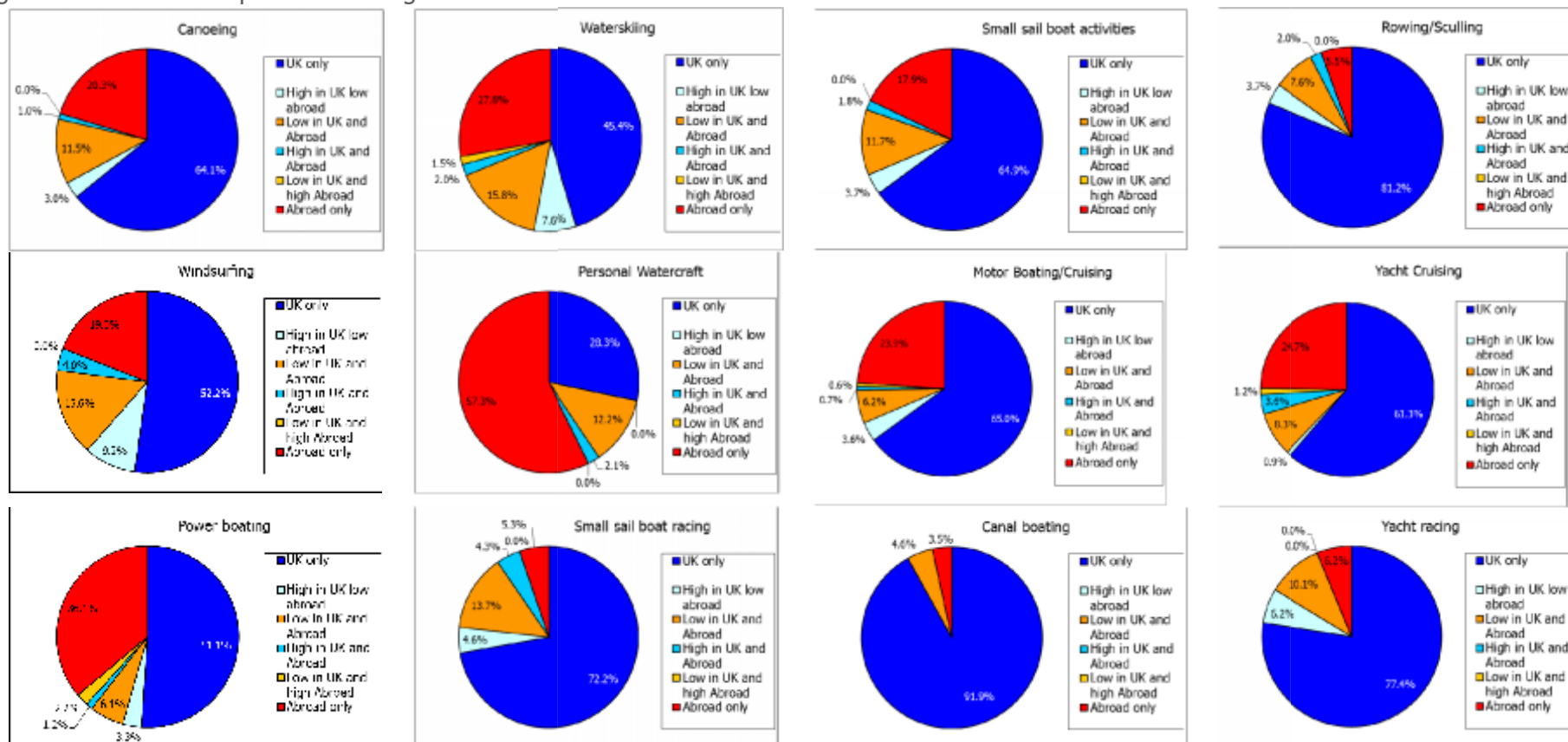
Table 46 Where Participation is Taking Place – 2010 vs. 2009

	UK only	High in UK low abroad	Low in UK and Abroad	High in UK and Abroad	Low in UK and high Abroad	Abroad only
Canoeing	-2%	0%	2%	0%	0%	0%
Water skiing	10%	3%	6%	-7%	-2%	-11%
Small sail boat activities	7%	0%	-4%	-1%	0%	-2%
Rowing/Sculling	11%	1%	-8%	0%	0%	-4%
Windsurfing	15%	6%	1%	0%	0%	-21%
Using personal watercraft	-13%	0%	-5%	1%	0%	17%
Motor boating/Cruising	8%	-1%	-7%	0%	1%	-1%
Yacht cruising	9%	-7%	0%	-1%	1%	-3%
Power boating	-3%	-2%	1%	0%	0%	3%
Small sail boat racing*	10%	3%	-12%	4%	0%	-5%
Canal boating	3%	-1%	-3%	0%	-1%	1%
Yacht racing*	22%	-3%	-8%	-10%	-4%	3%

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Figure 18 Where Participation is Taking Place – 2010



## 7. Combinations of Activities

Below we compare cross participation between the 3 aggregated groups described earlier. These 3 groups contain the 12 original 'Any boating activities'. Table 47 presents numbers and percentages of the proportion of people who do each type of sport who also participate in other types of activity. For example, 15% of those participating in a power activity also take part in a sailing activity.

Table 47 Grouped Watersports Combination 2010

Also do						
People who do	Sail		Power		Manual	
	No.	%	No.	%	No.	%
Sail	846,889	100%	128,987	13%	249,617	18%
Power	128,987	15%	973,427	100%	173,399	12%
Manual	249,617	29%	173,399	18%	1,404,100	100%

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

Table 48 has combined data from 2008 to 2010. This increases the robustness of the estimates for individual activities; however some of the smaller sports still have relatively small numbers of participants for the cross activity analysis. Proportions have been highlighted in blue and bold if they are greater than 20%. For example, just over 20% of people who participate in windsurfing also participate in small sail boat activities, and 45% of people participating in yacht racing also participate in yacht cruising.

Table 48 Activity Combinations – Average 2008-2010

People who do...	Also do...												Base 2008 2010
	Canoeing %	Water skiing %	Small sail boat activities %	Rowing %	Using personal watercraft %	Motor boating/C ruising %	Yacht cruising %	Power boating %	Small sail boat racing %	Windsurfing %	Canal boating %	Yacht racing %	
Any boating activity	<b>35.3%</b>	9.5%	14.7%	7.5%	8.9%	15.8%	11.2%	11.5%	3.8%	7.2%	8.4%	2.9%	2,080
Canoeing	100.0%	5.4%	10.9%	5.7%	3.9%	5.9%	5.5%	5.6%	1.3%	6.4%	2.7%	1.3%	707
Water skiing	20.0%	100.0%	11.3%	7.2%	11.5%	11.7%	3.7%	16.0%	3.0%	15.2%	3.6%	3.9%	190
Small sail boat activities	<b>26.0%</b>	7.3%	100.0%	7.7%	4.2%	11.5%	12.3%	11.3%	7.6%	9.9%	3.3%	5.9%	305
Rowing/Sculling	<b>25.2%</b>	8.9%	15.2%	100.0%	4.0%	12.5%	8.0%	8.5%	5.6%	7.9%	7.7%	4.8%	155
Using personal watercraft	16.3%	12.1%	7.0%	4.1%	100.0%	15.4%	4.4%	17.5%	4.0%	8.3%	2.0%	3.2%	181
Motor boating/Cruising	13.3%	7.0%	10.8%	6.4%	8.7%	100.0%	6.0%	9.4%	3.2%	4.9%	2.2%	3.1%	342
Yacht cruising	17.7%	3.3%	16.8%	5.8%	3.3%	9.0%	100.0%	9.6%	9.1%	8.4%	3.2%	11.7%	240
Power boating	17.1%	13.6%	14.0%	5.6%	13.3%	14.5%	9.0%	100.0%	8.0%	6.4%	8.2%	6.3%	246
Small sail boat racing	12.5%	8.0%	<b>29.5%</b>	10.4%	9.9%	13.5%	<b>26.1%</b>	<b>23.8%</b>	100.0%	<b>21.9%</b>	9.6%	<b>21.9%</b>	80
Windsurfing	<b>31.0%</b>	<b>20.7%</b>	<b>20.1%</b>	8.6%	12.2%	11.1%	12.0%	11.0%	13.3%	100.0%	2.1%	7.1%	144
Canal boating	11.0%	4.0%	5.7%	5.5%	2.0%	4.3%	4.3%	4.9%	<b>35.7%</b>	2.0%	100.0%	2.3%	189
Yacht racing	16.1%	13.1%	<b>29.9%</b>	10.9%	10.2%	17.5%	<b>44.7%</b>	<b>25.1%</b>	<b>28.6%</b>	16.3%	12.2%	100.0%	61

Source: Watersports Omnibus Survey 2010 (Base: all respondents who participate in the respective activities)

- Manual water sport and motor water sport participants are less likely to participate in other water sports compared to their sailing counterparts.

## 8. Boat Ownership

The boat/craft ownership questions were asked for the first time in 2008. These questions were asked of each respondent, whether they had participated in any of the activities asked about earlier in the questionnaire or not. They refer to the household (not personal) ownership.

When presenting the results on an annual basis, the sample size of boat owners for many of the categories is small, therefore we have also presented data based on 3 years of combined data (2008 – 2010) to provide more robust estimates in addition to the annual results.

In the 2009 questionnaire Motor boats were split into Day Motor boats and Other Motor boats<sup>3</sup>. We present an overall total for Motor Boats (Day or Other), which is used to compare results with previous waves, as well as the separate results for Day and Other Motor boats.

### Boat ownership penetration in UK households

The table below shows the proportion of UK households owning any of the boat/craft types presented. It also shows the lower and upper 90% confidence intervals around this estimate. For example, we can be 90% certain that the true figure of households owning any type of boat from the list below lies between 2.15% and 2.59% in 2010.

We can use a UK household estimate of 25.2 million households to convert these proportions into an estimate of the number of households owning any type of boat or craft.

The boat/craft may be kept either at home or abroad (see next section). It should be borne in mind that though this is a factual question it is still subject to respondent's perceptions. For example a boat left unused will at some point be discounted by a respondent.

- 2.4% of UK households state they own at least 1 of the boat/craft types listed.
- This equates to 597,000 households owning a boat/craft – down from 681,000 in 2009.
- The decline in participation may well account for a fall in boat ownership especially in a tougher economic climate.
- The proportion of UK households owning any kind of boat or craft has decreased to a level closer to that seen in 2008 (2.47%).
- The overall decrease in ownership is statistically significant but the change in individual boat/craft types is not.

<sup>3</sup> A 'Day Motor Boat' is a river or coastal boat without cooking facilities and a place suitable for sleeping). An 'Other Motor Boat' is a river or coastal boat with cooking facilities and a place suitable for sleeping.



Table 49 Penetration of Boat Ownership in UK Households 2010

	% of households owning a boat	% of households owning a boat		Number of households owning a boat	Min 90% number	Max 90% number
		Min 90%	Max 90%			
Any boat	2.37%	2.15%	2.59%	596,746	540,679	652,812
Small sailing boat	0.45%	0.35%	0.54%	112,144	87,600	136,687
Sailing yacht	0.20%	0.13%	0.27%	50,392	33,920	66,865
Power Boat	0.17%	0.11%	0.24%	43,932	28,550	59,315
Motor boat (Day or Other)	0.42%	0.32%	0.51%	105,173	81,401	128,945
Day Motor boat	0.24%	0.17%	0.31%	60,788	42,699	78,876
Other Motor boat	0.18%	0.11%	0.24%	44,385	28,924	59,847
Canal boat	0.06%	0.03%	0.10%	16,267	6,901	25,632
Canoe/Kayak	0.91%	0.77%	1.05%	228,969	193,981	263,958
Rowing boat	0.09%	0.05%	0.13%	22,576	11,544	33,608
RIBs\Inflatables or sportsboats	0.12%	0.07%	0.17%	30,058	17,331	42,785
Windsurfer	0.29%	0.21%	0.36%	71,961	52,284	91,637
Personal watercraft	0.07%	0.03%	0.11%	17,656	7,899	27,412
Base	12,562			25,200,000		

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

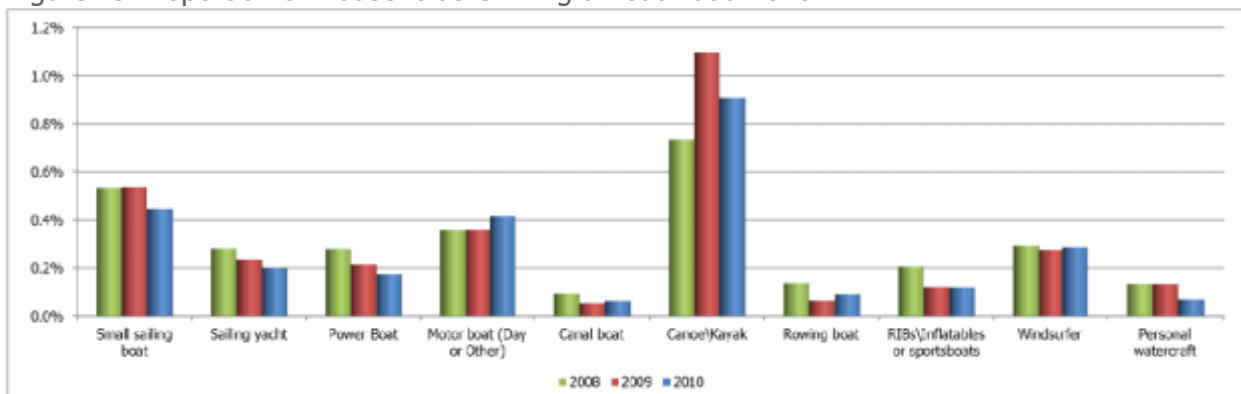
Table 50 Penetration of Boat Ownership in UK Households 2010 vs. 2009

% of households owning a boat				
	2010	2009	Difference (percentage points)	Significance Measure
Any boat	2.37%	2.73%	-0.37%	<b>93%</b>
Small sailing boat	0.45%	0.54%	-0.09%	71%
Sailing yacht	0.20%	0.24%	-0.04%	46%
Power Boat	0.17%	0.22%	-0.04%	55%
Motor boat (Day or Other)	0.42%	0.36%	0.06%	54%
Day Motor boat	0.24%	0.22%	0.02%	29%
Other Motor boat	0.18%	0.14%	0.04%	53%
Canal boat	0.06%	0.05%	0.01%	30%
Canoe\Kayak	0.91%	1.10%	-0.19%	87%
Rowing boat	0.09%	0.07%	0.02%	50%
RIBs\Inflatables or sportsboats	0.12%	0.12%	0.00%	2%
Windsurfer	0.29%	0.28%	0.01%	12%
Personal watercraft	0.07%	0.13%	-0.06%	88%
Base	12,562	12,683		

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

- Three year trends show little change in levels of ownership for the majority of boat/craft types
- Canoes/Kayaks are the only type to show any real variation in the penetration of ownership probably due to the size and cost relative to other types meaning they are easier on the finances to purchase and store

Figure 19 Proportion of Households Owning a Boat 2008-2010



Source: Watersports Omnibus Survey 2010 and 2009 (Base: all respondents - 12,562 and 12,683 adults aged 16+ respectively)

Due to small sample sizes among those owning boats, data from the three years combined is presented to give more robust estimates of the volume and profile of boat owners.

Table 51 Penetration of Boat Ownership in UK Households 2008-2010 Combined

	% of households owning a boat	Min 90%	Max 90%	Number of households owning a boat	Min 90% number	Max 90% number
Any boat	2.52%	2.39%	2.65%	635,755	602,456	669,053
Small sailing boat	0.51%	0.45%	0.57%	127,594	112,524	142,665
Sailing yacht	0.24%	0.20%	0.28%	60,144	49,783	70,505
Power Boat	0.22%	0.18%	0.26%	56,236	46,217	66,256
Motor boat (Day or Other)	0.38%	0.33%	0.43%	95,354	82,317	108,391
Day Motor boat	0.27%	0.23%	0.32%	68,770	57,693	79,848
Other Motor boat	0.11%	0.08%	0.13%	26,584	19,691	33,477
Canal boat	0.07%	0.05%	0.09%	17,644	12,028	23,261
Canoe\Kayak	0.91%	0.83%	0.99%	230,253	210,049	250,457
Rowing boat	0.10%	0.07%	0.12%	24,726	18,078	31,374
RIBs\Inflatables or sportsboats	0.15%	0.12%	0.18%	37,392	29,218	45,565
Windsurfer	0.28%	0.24%	0.33%	71,581	60,280	82,882
Personal watercraft	0.11%	0.09%	0.14%	28,830	21,652	36,008
Base	37,882			25,200,000		

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents 37,882 adults aged 16+)

- Those who own boats/craft are consistently more likely to participate in "Any boating activity" than those who do not.

Table 52 Penetration of Boat Ownership in UK Households by Watersport Participant

	Proportion of respondents that own the boat type that have participated in the activity	Proportion of respondents who do <b>not</b> own the boat type that have participated in the activity
Any boat	70.96%	4.03%
Small sailing boat	68.85%	5.33%
Sailing yacht	81.98%	5.46%
Power Boat	40.28%	5.55%
Motor boat (Day or Other)	68.62%	5.35%
Day Motor boat	70.65%	5.45%
Other Motor boat	65.84%	5.50%
Canal boat	87.22%	5.56%
Canoe\Kayak	81.46%	4.91%
Rowing boat	67.54%	5.55%
RIBS\Inflatables or sportsboats	91.86%	5.51%
Windsurfer	71.43%	5.42%
Personal watercraft	64.16%	5.57%
Base	613	427

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Table 53 Penetration of Boat Ownership in UK Households by Watersport Participant 2010-2008 Combined

	Proportion of respondents that own the boat type that have participated in the activity	Proportion of respondents who do <b>not</b> own the boat type that have participated in the activity
Any boat	64.02%	4.84%
Small sailing boat	65.78%	6.02%
Sailing yacht	82.15%	6.14%
Power Boat	66.11%	6.19%
Motor boat (Day or Other)	55.88%	6.15%
Day Motor boat	53.66%	6.19%
Other Motor boat	61.62%	6.32%
Canal boat	65.87%	6.28%
Canoe\Kayak	72.39%	5.72%
Rowing boat	54.75%	6.28%
RIBs\Inflatables or sportsboats	71.60%	6.23%
Windsurfer	56.53%	6.18%
Personal watercraft	74.89%	6.25%
Base	2,080	1,544

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents 37,882 adults aged 16+)

Table 54 looks at the proportion of households owning boats/craft by the socio-economic group of the main income earner in that household. The socio-economic group with the highest ownership rate for each individual boat type is highlighted in bold.

- Households in the AB category have the highest ownership rates for most of the boat/craft types, a result which has been consistent since 2007.
- As in 2009 and 2007, C1 households have higher ownership rates for personal watercraft.
- C1 households, for the first time, also have the highest ownership rates for other motor boats.

Table 54 Penetration of Boat Ownership in UK Households by SEG

	% of households owning a boat			All UK households
	AB	C1	C2DE	
Any boat	<b>4.63%</b>	2.95%	1.16%	2.37%
Small sailing boat	<b>1.05%</b>	0.53%	0.16%	0.45%
Sailing yacht	<b>0.37%</b>	0.32%	0.06%	0.20%
Power Boat	<b>0.23%</b>	0.15%	0.17%	0.17%
Motor boat (Day or Other)	<b>0.68%</b>	0.60%	0.21%	0.42%
Day Motor boat	<b>0.43%</b>	0.30%	0.13%	0.24%
Other Motor boat	0.24%	<b>0.30%</b>	0.08%	0.18%
Canal boat	<b>0.17%</b>	0.00%	0.06%	0.06%
Canoe\Kayak	<b>1.71%</b>	1.19%	0.43%	0.91%
Rowing boat	<b>0.20%</b>	0.08%	0.05%	0.09%
RIBs\Inflatables or sportsboats	<b>0.32%</b>	0.16%	0.02%	0.12%
Windsurfer	<b>0.69%</b>	0.37%	0.08%	0.29%
Personal watercraft	0.09%	<b>0.13%</b>	0.03%	0.07%
Base	2,174	3,350	7,038	12,562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

The table below shows the same information for the combined 2008-2010 data to give an average figure for the three year period.

Table 55 Penetration of Boat Ownership in UK Households by SEG 2010-2008 Combined

% of households owning a boat				
	AB	C1	C2DE	All UK households
Any boat	<b>4.65%</b>	2.98%	1.42%	2.52%
Small sailing boat	<b>1.22%</b>	0.54%	0.21%	0.51%
Sailing yacht	<b>0.47%</b>	0.33%	0.09%	0.24%
Power Boat	<b>0.30%</b>	0.22%	0.19%	0.22%
Motor boat (Day or Other)	<b>0.58%</b>	0.42%	0.27%	0.38%
Day Motor boat	<b>0.43%</b>	0.29%	0.20%	0.27%
Other Motor boat	<b>0.15%</b>	0.13%	0.07%	0.11%
Canal boat	<b>0.13%</b>	0.04%	0.06%	0.07%
Canoe\Kayak	<b>1.64%</b>	1.25%	0.43%	0.91%
Rowing boat	<b>0.25%</b>	0.08%	0.05%	0.10%
RIBS\Inflatables or sportsboats	<b>0.33%</b>	0.20%	0.04%	0.15%
Windsurfer	<b>0.65%</b>	0.36%	0.10%	0.28%
Personal watercraft	<b>0.16%</b>	0.13%	0.09%	0.11%
Base	6,700	9,831	21,351	37,882

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents 37,882 adults aged 16+)

Table 56 shows the differences between 2009 and 2010 for the different socio-economic groups. Significant changes are highlighted in red.

- AB households show a very small growth in the proportion owning any type of boat.
- The decreases in C1 households and the statistically significant decrease in C2DE households means that overall the proportion of households owning any type of boat is showing a statistically significant decrease.
- The largest proportional decrease comes from canoes/ kayaks in C1 households.

Table 56 Change in Penetration of Boat Ownership in UK Households by SEG 2010 vs. 2009

% of households owning a boat				
	AB	C1	C2DE	All UK households
Any boat	0.12%	-0.55%	<b>-0.43%</b>	<b>-0.37%</b>
Small sailing boat	-0.22%	0.04%	-0.11%	-0.09%
Sailing yacht	-0.08%	0.00%	-0.04%	-0.04%
Power Boat	-0.01%	-0.13%	0.00%	-0.04%
Motor boat (Day or Other)	0.22%	0.24%	-0.11%	0.06%
Day Motor boat	0.18%	0.03%	-0.04%	0.02%
Other Motor boat	0.03%	0.21%	-0.07%	0.04%
Canal boat	0.08%	-0.03%	0.01%	0.01%
Canoe\Kayak	-0.10%	<b>-0.56%</b>	0.00%	-0.19%
Rowing boat	0.08%	0.02%	0.00%	0.02%
RIBS\Inflatables or sportsboats	0.03%	0.06%	-0.05%	0.00%
Windsurfer	0.21%	-0.04%	-0.04%	0.01%
Personal watercraft	0.01%	-0.07%	<b>-0.09%</b>	-0.06%

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

The table below converts the proportion of households owning a boat in the UK by SEG into an absolute number of households. The overall number of households in the different socio-economic groups is an estimate based on the total number of households as given by the ONS and the distribution of households by SEG as presented in the 2008 Marketing Pocket Book.

Table 57 Number of UK Households Owning a Boat by SEG

Number of households owning a boat				All UK households
AB	C1	C2DE		
Any boat	301,996	215,310	131,081	596,746
Small sailing boat	68,747	38,832	18,178	112,144
Sailing yacht	24,311	23,351	7,041	50,392
Power Boat	15,025	10,917	19,045	43,932
Motor boat (Day or Other)	44,154	43,731	23,740	105,173
Day Motor boat	28,333	21,779	15,112	60,788
Other Motor boat	15,822	21,952	8,628	44,385
Canal boat	10,877	-	7,288	16,267
Canoe\Kayak	111,865	86,867	48,995	228,969
Rowing boat	13,313	5,851	5,844	22,576
RIBs\Inflatables or sportsboats	20,864	11,703	2,043	30,058
Windsurfer	44,876	27,173	9,054	71,961
Personal watercraft	5,733	9,642	2,956	17,656
All households	6,526,800	7,308,000	11,340,000	25,200,000
Base	2,174	3,350	7,038	12,562

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

The table below shows the combined 2008-2010 data to give an average figure for the three year period.

Table 58 Number of UK Households Owning a Boat by SEG 2010-2008 Combined

Number of households owning a boat				All UK households
AB	C1	C2DE		
Any boat	304,954	218,091	160,548	683,593
Small sailing boat	80,225	39,476	23,251	142,952
Sailing yacht	30,505	24,302	10,709	65,516
Power Boat	19,809	16,123	21,958	57,891
Motor boat (Day or Other)	38,075	30,831	30,995	99,902
Day Motor boat	28,234	21,212	22,766	72,212
Other Motor boat	9,841	9,619	8,229	27,690
Canal boat	8,380	2,965	7,336	18,682
Canoe\Kayak	107,712	91,448	48,603	247,763
Rowing boat	16,157	5,700	5,875	27,732
RIBs\Inflatables or sportsboats	21,823	14,743	5,054	41,620
Windsurfer	42,563	26,048	11,133	79,743
Personal watercraft	10,430	9,576	9,872	29,878
All households	6,552,000	7,308,000	11,340,000	25,200,000
Base	6,700	9,831	21,351	37,882

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents 37,882 adults aged 16+)

Table 59 shows the proportion of households owning a boat by residence in ITV region. This does not mean that the boats are actually kept in these regions, but is based on household residence only. It should be borne in mind that very small changes in ownership will affect the relative position of each region to others in the list.

Table 59 Penetration of Boat Ownership in UK Households by Residence in ITV Region 2010

% of households owning a boat						
	London/ East/ South East	Wales/ West/ South West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland	Northern Ireland
Any boat	2.6%	4.5%	2.7%	1.4%	1.6%	2.9%
Small sailing boat	0.6%	0.8%	0.5%	0.3%	0.1%	0.5%
Sailing yacht	0.3%	0.2%	0.2%	0.1%	0.2%	0.0%
Power Boat	0.3%	0.2%	0.1%	0.1%	0.1%	0.2%
Motor boat (Day or Other)	0.6%	0.9%	0.1%	0.2%	0.5%	0.8%
Day Motor boat	0.4%	0.7%	0.0%	0.1%	0.1%	0.5%
Other Motor boat	0.2%	0.2%	0.1%	0.1%	0.4%	0.2%
Canal boat	0.0%	0.1%	0.1%	0.1%	0.0%	0.0%
Canoe\Kayak	0.9%	1.9%	1.3%	0.3%	0.7%	1.3%
Rowing boat	0.1%	0.3%	0.0%	0.1%	0.0%	0.3%
RIBs\Inflatables or sportsboats	0.1%	0.5%	0.2%	0.0%	0.0%	0.0%
Windsurfer	0.3%	0.6%	0.3%	0.2%	0.1%	0.0%
Personal watercraft	0.0%	0.0%	0.1%	0.1%	0.1%	0.3%
Base	4,107	1,302	2,022	3,613	1,147	371

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Table 60 Penetration of Boat Ownership in UK Households by Residence in ITV Region 2010-2008 Combined

% of households owning a boat						
	London/ East/ South East	Wales/ West/ South West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland	Northern Ireland
Any boat	2.8%	4.1%	2.2%	1.8%	2.3%	3.4%
Small sailing boat	0.6%	0.6%	0.4%	0.4%	0.3%	0.7%
Sailing yacht	0.3%	0.4%	0.2%	0.1%	0.3%	0.0%
Power Boat	0.3%	0.4%	0.2%	0.1%	0.1%	0.4%
Motor boat (Day or Other)	0.5%	0.8%	0.2%	0.2%	0.3%	0.6%
Day Motor boat	0.3%	0.7%	0.1%	0.2%	0.2%	0.5%
Other Motor boat	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%
Canal boat	0.0%	0.1%	0.2%	0.1%	0.0%	0.0%
Canoe\Kayak	0.9%	1.5%	1.0%	0.6%	1.1%	1.2%
Rowing boat	0.1%	0.2%	0.0%	0.0%	0.1%	0.4%
RIBS\Inflatables or sportsboats	0.2%	0.3%	0.2%	0.1%	0.1%	0.3%
Windsurfer	0.3%	0.4%	0.3%	0.2%	0.2%	0.2%
Personal watercraft	0.1%	0.2%	0.1%	0.1%	0.1%	0.3%
Base	12,586	3,937	5,523	11,253	3,464	1,119

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents 37,882 adults aged 16+)

Table 61 shows an estimate of boat/craft owning households in the different residential regions. The numbers are based on very small incidence rates and therefore they are sensitive to small changes in the patterns of response and should be taken as indicative only. Table 62 combined three years' worth of data to provide more robust estimates.

- The largest number of households owning a boat/craft can be found in the London/ East/ South East region. This is largely due to the difference in the number of households in this

region compared to other regions.

- The Wales/ West/ South West region has reversed the picture shown last year and now has more boat/craft owning households compared to the Northwest/ North East/ Yorkshire region.

Table 61 Number of UK Households Owning a Boat by Residence in ITV Region 2010

Number of households owning a boat						
	London/ East/ South East	Wales/ West/ South West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland	Northern Ireland
Any boat	225,976	151,255	105,805	82,780	36,438	21,599
Small sailing boat	50,596	25,365	19,776	15,924	1,609	3,541
Sailing yacht	29,580	6,608	5,991	5,895	3,794	-
Power Boat	24,680	7,687	3,360	6,224	1,894	1,716
Motor boat (Day or Other)	52,641	30,867	2,382	10,822	10,037	5,790
Day Motor boat	33,678	23,392	-	3,589	2,233	4,075
Other Motor boat	18,963	7,476	2,382	7,233	7,804	1,716
Canal boat	1,922	2,879	4,577	6,455	-	-
Canoe\Kayak	81,767	64,146	50,846	20,349	15,094	9,910
Rowing boat	8,519	8,627	-	4,977	-	2,025
RIBs\Inflatables or sportsboats	10,483	15,208	8,022	-	-	-
Windsurfer	28,229	18,388	13,811	12,295	2,137	-
Personal watercraft	3,642	-	5,383	3,843	1,873	2,304
All households	8,815,395	3,332,039	3,952,419	6,123,748	2,221,359	755,040
Base	4,107	1,302	2,022	3,613	1,147	371

Source: Watersports Omnibus Survey 2010 (Base: all respondents - 12,562 adults aged 16+)

Table 62 Number of UK Households Owning a Boat by Residence in ITV Region 2010-2008 Combined

Number of households owning a boat						
	London/ East/ South East	Wales/ West/ South West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland	Northern Ireland
Any boat	245,814	138,172	88,684	108,790	50,962	25,382
Small sailing boat	55,835	21,481	16,623	23,681	7,063	5,595
Sailing yacht	30,630	12,455	6,549	7,103	5,983	-
Power Boat	24,131	12,138	7,467	9,138	2,231	3,236
Motor boat (Day or Other)	39,905	27,540	6,916	14,588	6,868	4,390
Day Motor boat	27,612	22,766	5,170	9,902	3,823	3,821
Other Motor boat	12,293	4,774	1,747	4,687	3,045	568
Canal boat	3,715	2,486	6,398	5,143	-	-
Canoe\Kayak	78,689	51,162	37,737	38,371	24,094	8,785
Rowing boat	12,282	7,392	-	2,134	1,338	3,184
RIBs\Inflatables or sportsboats	14,167	9,971	6,815	5,027	1,286	2,294
Windsurfer	28,151	13,480	12,051	14,222	3,679	1,764
Personal watercraft	12,510	7,883	2,010	4,325	1,188	2,328
All households	8,815,395	3,332,039	3,952,419	6,123,748	2,221,359	755,040
Base	12,586	3,937	5,523	11,253	3,464	1,119

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents 37,882 adults aged 16+)

Combining the data for the past three years allows ownership penetration to be analysed by more detailed regions of residence, which is not possible at the annual level.

- The South West has the highest penetration of owners for "any boat" and for the majority of the individual boat/craft types

Table 63 Penetration of UK Households Owning a Boat by Residence Region 2010-2008 Combined

% of households owning a boat												
	North East	North West	Yorkshire and Humber	East Midlands	West Midlands	South West	East of England	London	South East	Wales	Scotland	Northern Ireland
Any boat	1.2%	2.3%	1.7%	2.1%	2.0%	4.9%	2.5%	1.2%	4.0%	2.9%	1.8%	3.4%
Small sailing boat	0.2%	0.5%	0.3%	0.6%	0.4%	1.0%	0.3%	0.2%	1.0%	0.3%	0.2%	0.7%
Sailing yacht	0.0%	0.1%	0.1%	0.2%	0.1%	0.5%	0.3%	0.2%	0.5%	0.4%	0.3%	0.0%
Power Boat	0.1%	0.2%	0.2%	0.1%	0.2%	0.4%	0.2%	0.2%	0.4%	0.2%	0.1%	0.4%
Motor boat (Day or Other)	0.1%	0.3%	0.3%	0.1%	0.1%	0.9%	0.4%	0.2%	0.7%	0.3%	0.3%	0.6%
Day Motor boat	0.0%	0.2%	0.3%	0.1%	0.1%	0.7%	0.2%	0.1%	0.6%	0.3%	0.1%	0.5%
Other Motor boat	0.1%	0.0%	0.1%	0.0%	0.0%	0.2%	0.2%	0.1%	0.2%	0.0%	0.1%	0.1%
Canal boat	0.0%	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
Canoe\Kayak	0.5%	0.9%	0.7%	0.7%	0.9%	1.7%	0.9%	0.3%	1.3%	1.2%	0.8%	1.2%
Rowing boat	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.1%	0.0%	0.3%	0.1%	0.1%	0.4%
RIBS\Inflatables or sportsboats	0.0%	0.1%	0.2%	0.0%	0.1%	0.4%	0.1%	0.0%	0.4%	0.2%	0.0%	0.3%
Windsurfer	0.3%	0.2%	0.1%	0.3%	0.3%	0.6%	0.4%	0.2%	0.3%	0.3%	0.1%	0.2%
Personal watercraft	0.1%	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%	0.1%	0.2%	0.3%	0.1%	0.3%
Base	1,630	4,359	3,171	2,725	3,363	3,239	3,477	4,450	5,221	1,858	3,270	1,119

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents 37,882 adults aged 16+)

Table 64 Average number of UK Households Owning a Boat by Residence Region 2010-2008 Combined

Number of households owning a boat												
	North East	North West	Yorkshire and Humber	East Midlands	West Midlands	South West	East of England	London	South East	Wales	Scotland	Northern Ireland
Any boat	12,734	65,347	36,604	36,994	43,831	104,086	57,594	37,441	137,010	34,662	40,763	24,674
Small sailing boat	2,014	12,996	7,391	11,392	8,813	20,587	7,731	7,020	33,939	3,711	5,461	5,439
Sailing yacht	328	3,194	1,870	3,402	2,760	9,757	6,442	5,248	15,809	5,031	5,842	-
Power Boat	1,036	4,805	4,732	1,909	4,929	8,871	3,928	4,739	13,011	2,464	2,369	3,145
Motor boat (Day or Other)	823	8,085	7,482	1,681	2,933	20,014	9,085	5,071	25,382	4,136	5,688	4,267
Day Motor boat	-	6,715	5,540	900	2,242	15,548	4,664	3,273	18,884	3,582	3,195	3,715
Other Motor boat	823	1,370	1,942	780	691	4,466	4,420	1,798	6,498	554	2,493	553
Canal boat	-	2,230	1,316	4,404	2,715	2,059	1,202	-	3,019	521	-	-
Canoe\Kayak	5,765	26,845	14,225	11,508	19,061	36,528	21,555	9,091	44,442	14,119	17,365	8,540
Rowing boat	-	782	1,177	-	658	4,910	1,315	1,128	9,126	813	1,421	3,095
RIBS\Inflatables or sportsboats	-	2,486	3,614	-	1,982	8,272	1,197	681	12,738	3,025	787	2,230
Windsurfer	3,150	7,040	2,860	5,067	6,750	12,383	8,425	7,310	9,519	4,171	2,929	1,715
Personal watercraft	654	2,714	1,465	437	914	2,923	2,573	2,415	7,782	3,126	1,262	2,263
All households	1,102,073	2,885,427	2,144,033	1,763,317	2,194,127	2,123,995	2,284,297	3,135,898	3,406,407	1,212,280	2,224,184	733,981
Base	1,630	4,359	3,171	2,725	3,363	3,239	3,477	4,450	5,221	1,858	3,270	1,119

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents 37,882 adults aged 16+)

## Boats owned in the UK and abroad

Respondents who said that their household owns a boat/craft were asked how many of each they owned (both in the UK and abroad). The base sizes for this question are very small for most categories of boat/craft, and therefore they are sensitive to small changes in the patterns of response and should be taken as indicative only.

- The highest number of boats/craft owned is windsurfers at an average of 1.8 per household.
- The vast majority of boats/craft, 94%, are kept in the UK. This is one percentage point higher than the previous two years.



Table 65 Average Number of Boats Owned in Boat Owning UK Households 2010

	Average number of boats owned by owning households	Average number of boats kept in the UK	Average number of boats kept abroad	Base
Any boat	1.35	1.28	0.07	265
Small sailing boat	1.26	1.24	0.02	51
Sailing yacht	1.04	0.91	0.12	23
Power Boat	1.18	0.99	0.19	20
Motor boat (Day or Other)	1.16	1.02	0.14	49
Day Motor boat	1.15	1.00	0.15	28
Other Motor boat	1.17	1.05	0.12	21
Canal boat	1.00	1.00	-	8
Canoe\Kayak	1.56	1.51	0.05	99
Rowing boat	1.58	1.58	-	12
RIBs\Inflatables or sportsboats	1.17	1.08	0.09	12
Windsurfer	1.80	1.77	0.03	29
Personal watercraft	1.11	1.11	-	8

Source: Watersports Omnibus Survey 2010 (Base: all respondents owning a boat)

Table 66 Proportion of Boats Owned That Are Kept in the UK and Abroad 2010

	% of boats kept in the UK	% of boats kept abroad	Base
Anyboat	94%	5%	265
Small sailing boat	98%	2%	51
Sailing yacht	88%	12%	23
Power Boat	84%	16%	20
Motor boat (Day or Other)	88%	12%	49
Day Motor boat	87%	13%	28
Other Motor boat	89%	11%	21
Canal boat	100%	0%	8
Canoe\Kayak	96%	3%	99
Rowing boat	100%	0%	12
RIBs\Inflatables or sportsboats	92%	8%	12
Windsurfer	98%	2%	29
Personal watercraft	100%	0%	8

Source: Watersports Omnibus Survey 2010 (Base: all respondents owning a boat)

Due to small sample sizes for boat ownership we have combined three years' worth of data to provide more robust estimates of the number of boats owned and where they are kept.

Table 67 Average Number of Boats Owned in Boat Owning UK Households 2008-2010 combined

	Average number of boats owned by owning households	Average number of boats kept in the UK	Average number of boats kept abroad	Base
Any boat	1.32	1.23	0.08	854
Small sailing boat	1.20	1.15	0.04	177
Sailing yacht	1.02	0.91	0.11	86
Power Boat	1.10	0.98	0.12	76
Motor boat (Day or Other)	1.13	1.02	0.10	131
Day Motor boat	1.12	1.02	0.10	92
Other Motor boat	1.16	1.03	0.13	39
Canal boat	1.00	1.00	-	28
Canoe\Kayak	1.60	1.55	0.05	300
Rowing boat	1.23	1.18	0.05	35
RIBs\Inflatables or sportsboats	1.08	0.95	0.13	50
Windsurfer	1.66	1.57	0.09	89
Personal watercraft	1.69	1.37	0.33	38

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents owning a boat)

Table 68 Proportion of Boats Owned That Are Kept in the UK and Abroad 2008 – 2010 combined

	% of boats kept in the UK	% of boats kept abroad	Base
Anyboat	93%	6%	854
Small sailing boat	96%	4%	177
Sailing yacht	89%	11%	86
Power Boat	89%	11%	76
Motor boat (Day or Other)	91%	9%	131
Day Motor boat	91%	9%	92
Other Motor boat	89%	11%	39
Canal boat	100%	0%	28
Canoe\Kayak	97%	3%	300
Rowing boat	96%	4%	35
RIBs\Inflatables or sportsboats	88%	12%	50
Windsurfer	94%	6%	89
Personal watercraft	81%	19%	38

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents owning a boat)

## Number of boats owned overall

Using the estimated number of households owning each of the different types of boat/craft as established in

Table 49 and the average number owned as shown in

Table 65 we can calculate an estimated number of boats/craft owned by households in the UK which are kept in the UK and the number owned by UK households which are kept abroad.

- Although the number of boat owning households has declined the number of actual boats/craft owned shows little change.
- 7 out of the 12 boat types have increased in absolute numbers compared to 2009.
- The overall figure for all boats/craft does show a decline over the previous year largely due to a decrease in canoe/kayak ownership and personal watercraft.

Table 69 Number of Boats Owned in UK and Abroad by UK Households 2010

	Total			Number of boat owning households
	Total number of boats owned by households	number of boats kept in the UK	Total number of boats kept abroad	
All boats	1,064,219	1,000,708	61,944	596,746
Small sailing boat	141,740	139,494	2,246	112,144
Sailing yacht	52,215	45,950	6,264	50,392
Power Boat	51,960	43,476	8,484	43,932
Motor boat (Day or Other)	121,971	107,581	14,390	105,173
Day Motor boat	69,820	60,923	8,897	60,788
Other Motor boat	52,150	46,658	5,493	44,385
Canal boat	16,267	16,267	-	16,267
Canoe\Kayak	357,491	344,730	11,194	228,969
Rowing boat	35,769	35,769	-	22,576
RIBs\Inflatables or sportsboats	35,167	32,347	2,821	30,058
Windsurfer	129,668	127,513	2,155	71,961
Personal watercraft	19,544	19,544	-	17,656

Source: Watersports Omnibus Survey 2010 (Base: all respondents owning a boat)

Table 70 Number of Boats Owned in UK and Abroad by UK Households 2010-2008 Combined

	Total			
	Total number of boats owned by households	number of boats kept in the UK	Total number of boats kept abroad	Number of boat owning households
All boats	1,067,416	1,002,999	63,015	635,755
Small sailing boat	152,825	147,291	5,534	127,594
Sailing yacht	61,304	54,432	6,872	60,144
Power Boat	61,673	54,833	6,840	56,236
Motor boat (Day or Other)	107,511	97,522	9,990	95,354
Day Motor boat	76,759	70,115	6,644	68,770
Other Motor boat	30,753	27,407	3,346	26,584
Canal boat	17,644	17,644	-	17,644
Canoe\Kayak	369,087	356,493	11,193	230,253
Rowing boat	30,345	29,106	1,239	24,726
RIBS\Inflatables or sportsboats	40,347	35,557	4,790	37,392
Windsurfer	119,168	112,600	6,568	71,581
Personal watercraft	48,814	39,429	9,385	28,830

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents owning a boat)

Table 71 Number of Boats Owned by UK Households in 2008-2010

	2010		2009		2008	
	Total number of boats owned by households	Number of boat owning households	Total number of boats owned by households	Number of boat owning households	Total number of boats owned by households	Number of boat owning households
All boats	1,064,219	596,746	1,099,444	680,835	952,934	614,083
Small sailing boat	141,740	112,144	155,122	134,056	157,843	133,362
Sailing yacht	52,215	50,392	60,287	58,648	69,844	69,844
Power Boat	51,960	43,932	57,508	53,797	73,966	69,494
Motor boat (Day or Other)	121,971	105,173	98,463	89,386	99,713	89,350
Day Motor boat	69,820	60,788	58,833	54,441	n/a	n/a
Other Motor boat	52,150	44,385	39,630	34,945	n/a	n/a
Canal boat	16,267	16,267	13,128	13,128	23,102	23,102
Canoe\Kayak	357,491	228,969	448,208	273,344	292,637	182,949
Rowing boat	35,769	22,576	16,357	16,357	38,251	34,630
RIBS\Inflatables or sportsboats	35,167	30,058	33,637	29,926	51,213	51,213
Windsurfer	129,668	71,961	118,272	68,540	106,851	72,543
Personal watercraft	19,544	17,656	57,374	32,889	39,515	33,090

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents owning a boat)

Table 72 is a summary of the total number of boats/craft owned by UK households, grouped into combined categories.

- In total, there are over just under 1.1 million boats/craft owned by UK households and about 1 million are kept in the UK.

Table 72 Estimate of Total Number of Boats Owned by UK Households 2010

	Average number of boats owned by households	Total		Number of boat owning households
		number of boats kept in the UK	Total number of boats kept abroad	
All boats	1,064,219	1,000,708	61,944	596,746
Sailing Boats	229,122	217,791	11,331	247,860
Motor Boats	461,339	421,920	39,419	157,932
Manual Craft	373,758	360,996	11,194	264,137

Source: Watersports Omnibus Survey 2010 (Base: all respondents owning a boat)

Table 73 Estimate of Total Number of Boats Owned by UK Households 2010-2008 Combined

	Average number of boats owned by households	Total number of boats kept in the UK		Number of boat owning households
		boats kept in the UK	Total number of boats kept abroad	
All boats	1,067,416	1,002,999	63,015	635,755
Sailing Boats	254,476	237,280	17,196	264,184
Motor Boats	426,208	391,582	34,626	164,635
Manual Craft	386,732	374,137	11,193	277,204

Source: Watersports Omnibus Survey 2010, 2009, 2008 (Base: all respondents owning a boat)

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