



# Watersports and Leisure Participation Survey 2009



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# Foreword

By Paul Bayliss, RYA

In this the eighth year of the Watersports and Leisure Participation Survey, we're delighted to see the project go from strength to strength. Achieving consistency across the years has been paramount in retaining the ability to track trends and this has to be balanced against developing requirements from the partners and sponsors. What started off in 2002 as a fairly modest participation survey now has great depth and width. What's more, the work is specific to the marine market, industry and environment and paints a valuable picture for those of us who work in the sector.

All of this is only possible because of the continuing support of the four partners the British Marine Federation, the Maritime and Coastguard Agency, the Royal National Lifeboat Institution and the Royal Yachting Association, and the grateful support of our sponsor YBW.com. This work is important when defining the future direction and strategy for all the parties involved, often for very different reasons.

When reading this report, it's important to bear in mind that each survey is only a snapshot in time and is subject to normal statistical inaccuracies as well as natural variations in actual activity. It is therefore much safer to compare the results across a number of years and this is where eight years worth of consistent data is so valuable.

I hope you find the report interesting and informative.

Long may the project continue.

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## Key Findings

Commissioned by BMF, MCA, RNLI and RYA, sponsored by YBW.com

- 7.2% of those surveyed participated in at least one of the 12 boating activities\* in 2009 (compared to 6.2% in 2008 and 7.84% in 2007). This means that up to 3.7 million UK adults participate in these boating activities.
- 26.3% of those surveyed have participated in the 21 watersports and water based leisure activities# in 2009 (23% in 2008 and 29.63% in 2007). This means that up to 13.2 million UK adults participate in these watersports and water based leisure activities.
- There has been no significant change from last year in participation for 13 of these activities; water skiing, using personal watercraft, motor boating/cruising, yacht cruising, small sail boat racing, canal boating, yacht racing, kitesurfing, angling (from a boat), angling (from the shore), cliff climbing, coastal walking, leisure sub-aqua diving (from the shore and boat).
- The remaining activities show significant increases compared to 2008, most notably for spending general leisure time at the beach and outdoor swimming, both activities which had dropped significantly in 2008.
- The average number of times people participate has seen a drop in several activities, suggesting that more casual participants have returned to these activities after stopping in 2008.
- Males show higher participation rates in almost all of the activities, although females have an increasing trend for participation in boating activities over the last eight years while the trend for males is showing a decline.
- Participation rates are marginally increasing for those aged over 34 whilst the participation rate in the 16-34 age group continues to decline. People in the 35-54 age group are the most active across 'any activity' whilst the 16-34 age group are still more likely to participate in 'any boating activity'.
- The socio-economic group AB has increased its share of highest participation rates; the group now has the highest participation rates for 19 out of the 21 activities, up from 15 in 2008. The C1 group however has the highest number of actual participants because of its larger overall size.
- Families account for the highest number of participants for the majority of activities, whilst student/workers in a house share and couples under 55 have higher participation rates.
- 2.73% 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, 7% 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.

# The 21 activities making up "Any Activity" includes all of the boating activities above plus Surfboarding, Angling from the shore, Angling from a boat, Outdoor Swimming, Leisure Sub Aqua diving, Cliff Climbing, Coastal Walking, Spending General Leisure time at the beach and Kitesurfing.

## Executive Summary

### Introduction

This is the eighth year that we have undertaken the Watersports and Leisure Participation Survey. During this time we have established a consistent methodology and firm foundation for assessing trends in participation, and gained invaluable insight into the profile and characteristics of watersports activities.

This year we have for the first time asked about when and why people took up their sport or stopped participating. This has given us new insight into the considerable churn there is each year with many casual participants coming into and leaving the sport annually.

### Watersports and Leisure Participation 2009

We measured a considerable drop in participation in 2008, after a period of continuing increases over the two years before that. In 2009 the number of people participating in 'any boating activity' has recovered and now stands at up to 3.7 million; the same level as 2006. Any estimate based on a sample of the population (in this case 12,683 respondents) is only accurate within defined statistical confidence intervals. This sample size allows us to be 90% certain that the true number of people participating in 'Any boating activity' is estimated at up to 3.7 million adults in 2009 compared to 3.2 million in 2008, 4 million in 2007, 3.7 million in 2006 and 3.5 million in 2005<sup>1</sup>.

The headline participation figures are based on our best estimate for the participation rate for 'Any boating activity'<sup>2</sup> is 7.2%, a significant increase of 1.0 percentage point on 2008. When we apply this participation rate to the UK adult population of 49,051,000, we can calculate a UK base participant number of 3,584,000 (rounded to the nearest thousand). Any estimate based on a sample of the population (in this case 12,637 respondents) is only accurate within defined statistical confidence intervals. This sample size allows us to be 90% certain that the true number of people participating in "Any boating activity" lies between 3,350,000 and 3,719,000 participants.

This increase could be due to continuing spells of good weather in the UK, especially in spring 2009 (source: Met Office statistics). Alongside the growth in the numbers of participants there has, for several activities, been a decline in the average number of times people participate. This is a reversal of the trend in 2008 and suggests that this year there has been a recovery in casual participants in these activities.

Of the 12 'any boating activities', participation has significantly increased in five of them in 2009. These are (in descending order):

- Canoeing (+0.60 percentage points)
- Power boating (+0.58 percentage points)
- Rowing/sculling (+0.33 percentage points)
- Small sail boat activities (+0.26 percentage points)
- Windsurfing (+0.19 percentage points)

<sup>1</sup> When comparing actual numbers of participants over all seven years it needs to be taken into account that prior to 2005 the survey did not include Northern Ireland.

<sup>2</sup> 'Any Boating Activity' includes Small sail boat racing, Small sail boat activities, Yacht racing, Yacht cruising, Powerboating, Motor boating/Cruising, Using Personal Watercraft, Rowing, Canoeing, Canal boating, Water skiing and Windsurfing).

Of the remaining seven activities three show statistically insignificant rises (Water skiing; +0.04 percentage points, Small sail boat racing; +0.05 percentage points and Canal boating; +0.11 percentage points).

Two activities show statistically insignificant drops (Motor boating/cruising; -0.13 percentage points and Yacht cruising; -0.06 percentage points), while Using personal watercraft and Yacht racing have not changed at all.

There are 3 significant increases for the other activities we track. These are (in descending order):

- Spending general leisure time at the beach (+2.84 percentage points)
- Outdoor swimming (+1.78 percentage points)
- Surfboarding (+0.29 percentage points)

The headline figure when taking all 21 surveyed activities into account<sup>3</sup> is up to 13.2 million adults, from 11.6 million in 2008, but still lower than the 14.7 million in 2007. The comparative number for 2006 is 13.8 million and 12.9 million in 2005. This big increase in the overall number of participants in 'Any activity' is influenced heavily by an increase in the most popular activities such as outdoor swimming and spending general leisure time at the beach. In 2008 it was a decline in exactly these activities which caused the drop in participation of 'Any activity' in that year. Both these activities have seen significant increases this year. The other big activity, coastal walking, has seen a very minor decline.

Our best estimate for the participation rate for 'Any activity' is 26.28% of adults in the UK, up from 23.03% in 2008. However, it is still lower than the peak 29.63% reached in 2007. This participation rate applied to the UK adult population, gives us a participant figure of 12.9 million for 'Any activity' (rounded to the nearest thousand)<sup>4</sup>. As above, this number is estimated to lie within a range. We are 90% certain that, for "Any Activity", the true number of participants ranges between 12,578,000 and 13,200,000 people.

## The Socio-Demographics of Participation

### Gender

As in all previous waves for most activities males show a higher participation rate than females. Males have at least twice the female participation rate in 14 of the 21 activities. This is up on the 8 recorded in 2008, but on par with the 13 recorded 2007. The activities in which males are at least twice as likely to participate in 2009 are (in order of highest to lowest difference):

- Angling (from the shore)
- Surfboarding
- Power boating
- Angling (from a boat)
- Leisure sub-aqua diving (from the shore and boat)
- Cliff climbing
- Yacht cruising
- Rowing/Sculling
- Using personal watercraft

<sup>3</sup> 'Any Activity' includes all of the boating activities above plus surfboarding, angling from the shore, angling from a boat, outdoor swimming, leisure sub aqua diving, cliff climbing, coastal walking, spending general leisure time at the beach and kitesurfing)

<sup>4</sup> As above, this number is estimated to lie within a range. We are 90% certain that, for 'Any activity', the true number of participants ranges between 12,578,000 and 13,207,000 people. In other words, more than one quarter (26%) of the adult UK population has taken part in some form of activity on or next to the water in 2009.

- Water skiing
- Windsurfing
- Small sail boat racing
- Yacht racing
- Kitesurfing

'Coastal walking' and 'spending general leisure time at the beach', are the only two activities where females show a higher participation rate than males, this has been consistently the case for several waves.

## Age

The 35-54 age group has the highest participation rate in all aggregated participation categories except 'any boating activity' where the youngest age group remains the most active. The 35-54 age group's participation seems more consistent than their younger counterparts, and over time has held up much better. Over time there has been a significant long term decline in participation among the youngest group.

Looking at the individual activities, the 35-44 age group has the highest participation rate for (in order of highest to lowest difference):

- Coastal walking
- Spending general leisure time at the beach
- Small sail boat activities
- Angling (from the shore)
- Canal boating
- Angling (from a boat)
- Power boating
- Yacht cruising
- Yacht racing

16-34 year olds continue to show higher participation rates in the other, more 'active' activities like canoeing, water skiing, kitesurfing, cliff climbing etc.

The 55+ age group are not the most active group in any of the activities in 2009. In 2008 they showed the highest participation rate for canal boating (the first time that this age group had showed the highest participation rate for any activity). However this was largely because of declines in the other age groups rather than any growth in their participation. In 2009 their participation has dropped compared to 2008.

## Socio-Economic Group

As in previous years, those from socio-economic group AB record higher participation rates than those in other socio-economic groups in most of the activities (19 out of 21 compared to 15 out of 21 in 2008). Those in socio-economic group C1 have higher participation rates in 2 activities, down from 5 in 2008 (but the same figure as in 2007); the activities are; kitesurfing and angling from the shore. Those in socio-economic group C2DE do not have the highest participation rate in any of the activities. In 2008 they showed the highest rate in angling from the shore.

In spite of higher participation rates, the smaller size of the AB group means that they are the largest group of participants in only 6 of the 19 activities where they have highest participation rates. These activities are (in order of highest to lowest number of participants):

- Coastal walking

- Small sail boat activities
- Power boating
- Yacht cruising
- Using personal watercraft
- Windsurfing

In the following 13 activities those from socio-economic group C1 are the largest single group despite not always being the highest in participation rate (in order of highest to lowest absolute number of participants):

- Outdoor swimming
- Canoeing
- Surfboarding
- Leisure sub-aqua diving (from the shore and boat)
- Cliff climbing
- Rowing/sculling
- Water skiing
- Yacht racing
- Kitesurfing

Despite lower participation rates in all of the activities, those from socio-economic group C2DE are the largest single group in absolute numbers in 6 activities (up from 2 in 2008). Because of the relative size of the C2DE group in the population small increases in the participation rates have a larger impact on the absolute number of participants than for the other socio-economic groups.

Those from the socio-economic group C2DE are the largest single group for the following activities (in order of highest to lowest absolute number of participants):

- Spending general leisure time at the beach
- Angling from the shore
- Angling from a boat
- Motor boating/cruising
- Canal boating
- Small sail boat racing

## Ethnicity

Participation rates are highest amongst White Irish in 6 of the 12 'any boating activities', confirming the results from 2008 when this analysis was carried out for the first time. White British have the highest participation rates in 4 activities (up from 3 in 2008). These are in descending order highest to lowest participation rate:

- Motor boating/cruising
- Canal boating
- Surfboarding
- Leisure sub-aqua diving

White British represent the single largest group in terms of absolute numbers for all activities.

## Life stage

Two life stage groups with very similar participation rates:-



'Couples under 55' and those 'living in a family' have the highest participation rates for 'any activity'; 32.9% and 32.0% respectively have participated in at least one of the surveyed activities in the past year.

Due to the large number of people in the family category, families account for the majority of participants in absolute numbers for most activities. The only activities where this is not the case are: rowing/sculling, windsurfing, using personal watercraft and kitesurfing in which the largest participation group are those 'living in student/ workers house shares', while for yacht racing 'singles' are the largest group. As seen in previous years, people who are from the older 'Grey' category have the lowest participation rate for both 'any activity' and 'any boating activity', recording participation rates of 13.2% and 1.7% respectively.

## Regional participation

Participants living in the South have the highest participation rates in nine out of the 21 activities. They have the highest participation in 'any boating'. All the sail boat and yachting activities are also most popular amongst residents in this area. Motor boating/cruising activities on other hand show a higher participation rate amongst people living in the East, while participation in 'any activity' is highest amongst those from Northern Ireland, mainly due to the very high participation rate for 'Spending general leisure time at the beach'.

## Participation History

### Last Participation

The majority of those that have not participated in the past 12 months have never done so in the past either. Of those who haven't participated in 'sailing' in the past 12 months, only 12% have actually participated in 'sailing' at some point in the past. For 'power/motor boating' and 'other watersports' these previous participation rates stand at 8% and 19% respectively. For those who had participated at one point in the past, the majority have participated for the last time more than 5 years ago. However approximately 31% of those participating in 'sailing' in 2008 stopped in 2009. For 'power/motor boating' this rate stands at 33% and 'other watersports' at 46%. Combined with the large proportion starting in 2009 this reveals a very high churn rate of watersports activities.

### First Participation

Many of those who have participated in at least one activity in the sailing, power/motor boating or watersports categories in the past 12 months have started to participate for the first time in the past 12 months. 43% of participants in 'sailing' and 'other watersports' started in the last year whilst 46% of participants in 'power/motor boating' started in the last 12 months. The other significant group are those who participated in the last 12 months but have not participated previously for more than five years. Only a small proportion of respondents have started in the time scales between these two. Therefore rather than a sustained flow of new people committed to the sport, initial indications are that many people try out watersports each year, but only a minority sustain their participation in subsequent years who are the enthusiasts as opposed to casual participants.

### Reasons for starting and stopping to participate

'Having a go while on holiday' is an important reason that people started participating in the past 12 months. Other important reasons across all of the categories are 'another family member starting to participate', 'being invited by a family member/friend to use their boat/equipment' and 'having

wanted to do it for a long time'. Many of these reasons are therefore circumstantial rather than motivational which may be the reason why they do not lead to long term participation.

The main reasons for having stopped participating are:

- Losing interest in the activity
- No more time due to work commitments
- Change in personal circumstances (e.g. having children)
- Only participating on holidays, but have done something else in the past 12 months
- Saving money/ not able to afford it any more

## Frequency of Participation

The average number of times people said that they are participating in the UK has dropped in 6 of the 12 'any boating activities'. For example average participation in small sail boat activities in 2009 was 5.0 times compared to 7.7 times in 2008 and thus is close to the 4.8 recorded in 2007.

So while more people are taking part in the activities, those that do take part do so less often than they have in 2008. This is likely to reflect a recovery in more casual participation. The four activities from the original 12 that are seeing a drop in the average UK participation are canoeing, windsurfing, using personal watercraft and yacht cruising. Average participation for rowing and canal boating has stayed pretty much the same.

'Spending general leisure time at the beach' and 'kitesurfing' are showing the largest increase in frequency of participation amongst the other activities.

## Where is the Activity Taking Place

### UK v Overseas

Overall, a greater proportion of people are participating in the UK than abroad. This is especially true for canal boating where over 85% of respondents exclusively participate in the UK and 97% do at least some of their activity in the UK. For coastal walking and angling from the shore over 90% of respondents are doing at least some of their participation in the UK.

2,797,000 people have participated in at least one boating activity in the UK during the last 12 months and 1,515,000 have participated abroad in at least one boating activity abroad. These categories are however not mutually exclusive; people who have participated in the UK may or may not have participated abroad and vice versa. 2,020,000 people have only participated in the UK, 737,000 have only participated abroad. 777,000 people have participated both in the UK and abroad.

The proportion of respondents who have done at least some of their participation in the UK has increased for 10 activities and dropped for 11 activities compared to 2008. However, few of these changes are statistically significant. The only significant increases are for small sail boat racing and outdoor swimming. The only significant drop is for angling from a boat.

As seen in the past two waves, sub-aqua diving has the highest proportion of respondents saying that they did not participate in the UK in 2009, with the majority of activity focussed overseas.

The number of times people are participating in the activities is also higher in the UK than abroad, which is consistent with past surveys. This is not surprising as most people will be in the UK for most of the year and will only be abroad when on holidays. Compared to 2008 there is a drop in the

proportion of respondents who said that they have done at least some of their participation abroad for half of the 12 'boating activities'. Neither of these drops is statistically significant. The remaining six 'boating activities' have all recorded an increase, only one of which, for small sail boat racing, is statistically significant.

## Coast v Inland

In 2009 81% of all participation in 'any activity' in the UK took place at the coast, down from 84% in 2008 and similar to the 82% in 2007. Taking an average over the past 3 years this proportion stands at 82.2%, however this figure is dominated by general beach leisure and coastal walking as these activities are by definition coastal activities. 49.1% of participation in 'any boating activity' took place at the coast in 2009 (down from 55% in 2008 but slightly up on 2007, when it was 47.5%). This drop in the proportion of events that take place at the coast is due to an increase in absolute numbers of respondents participating in inland events rather than a drop in the number of respondents participating in coastal events which have stayed stable over the last two years.

1,455,000 people have participated in at least one boating activity at the coast and 1,762,000 have participated in at least one boating activity inland. These categories are however not mutually exclusive; people who have participated at the coast may or may not have participated inland, and vice versa. 1,035,000 people have only participated at the coast, 1,342,000 have only participated inland. 420,000 people have participated both at the coast and inland.

## Summer v Other Seasons

We also investigate how many times people participate by season. Unsurprisingly the majority of events have every year consistently taken place in the summer. About 50% of events happen in the summer season. The six activities showing the lowest summer participation rates are (in order from the least):

- Cliff climbing (37.6% in summer)
- Coastal walking (37.6% in summer)
- Angling (from the shore) (38.4% in summer)
- Angling (from a boat) (40.2% in summer)
- Surfboarding (41.5 % in summer)
- Canal boating (42.7% in summer)

## Club Membership

Club membership for the surveyed activities is generally low but differs by activity. When looking at the 12 'boating activities' 5 of these have less than 10% of participants covered by club membership. When taking all activities into account this rises to 8 activities. Yacht racing records the highest membership rates at over 60%, as it did in 2008.

Small sail boat racing, which recorded a drop in membership rates in 2008 to 33% from over 50% in 2007 has seen membership rates recover to 42.4%. The volatility of the numbers may in part be due to the small sample sizes within individual sports on which to base these estimates.

Club members participate more often in their chosen activity than other people. For example, club members of sub aqua diving account for just under 77% of total events in the UK in that activity in the past year despite the fact that membership rates continue to stand at 23%.

## Eight Year Trends

Despite the recent recovery in participation rates for several of the activities, the rate for 'any boating activity' shows a steady decline when looking at the overall trend. The trend line for 'any activity' also shows a slight decline.

When looking at individual activities, only 2 of the 21 activities show a positive trend in participation over the eight years. Both of these activities are from the 12 'any boating activities'.

The activities in order of the highest growth are:

- Canal boating
- Motor boating/cruising

The number of activities out of the '12 any boating activities' which show a stable trend in participation in 2009 has increased to three from two in 2008. These activities are: yacht cruising, yacht racing and power boating.

Looking at participation trends by gender over the past eight years it can be seen that female participation rates are more stable than those for males. Females' trends are also more positive given they show an increasing trend for 'any boating activity' and a stable trend for 'any activity', whereas male participation is declining.

Despite the increasing trend in female participation, males are still showing higher participation rates in almost all of the activities.

When looking at participation over the years by age groups there is a declining trend for any boating activity for the 16-34 age group, whereas the 35-54 age group and the 55+ age group show small increases.

## Boat Ownership

The proportion of households owning any type of boat has increased to 2.7% from 2.5% in 2008. In 2007 this figure was 2.7%. This translates to 681,000 households, to the nearest thousand, owning a boat in 2009. The increase from 2008 to 2009 is mainly due to an increase in the proportion of households owning a canoe/kayak (in line with the big increase in participation in this activity). Households in the socio-economic group AB are more likely to own any boat, as are those who have participated in 'any boating activity'.

Canoes/kayaks remain the boat type with the highest average number of boats owned per household (1.8 up from 1.6 in 2008). Windsurfers and personal watercraft follow with 1.7 and 1.7 respectively. The majority of boats are kept in the UK.

# 1. Introduction

The purpose of the Watersports and Leisure Participation Survey is to provide robust estimates of the level of participation in a range of watersports and water based leisure activities across the United Kingdom.

The research has been continuously conducted by Arkenford since 2003. 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 watersports. 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.

The 2009 results enable us to give an insight into trends by activity over an 8 year period for the 12 'any boating activities', and trends over the past 5 years for the additional 9 activities first surveyed for the MCA in 2004. 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 21 leisure based watersports/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.

- Small sail boat racing (dinghies)
- Small sail boat activities (dinghies)
- Using Personal watercraft (jetski or similar)

Additional explanation is provided when requested by the respondent for the following activities:-

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

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 (this was asked of all 21 activities)
- Participation abroad (asked of the 12 any boating activities)

These three questions form the core of the original 2002 questionnaire. We ensure that the extension of the activity list does not affect the participation rates of the 12 any boating activities, retaining year on year comparability. This is achieved by asking about the 12 original activities before any of the 9 added activities.

From 2005 four additional questions were specified by the MCA. The MCA share the information from these questions with all other consortium members. The questions cover:

- If the respondents have taken part in the activities in the UK in the last 12 months, they are asked how often they have participated by season (winter, spring summer and autumn).
- They are then asked about how often they participate at the coast or inland, and whether they are a club member for these activities.

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 with the following definitions added for each boat type:-

- Small sailing boat (a dinghy, day boat or other small keelboat, usually taken out of water at end of use)
- Sailing Yacht (usually with cooking facilities and a place suitable for sleeping)
- Power Boat (a craft that can plane over water excluding RIBS/Sportsboats)
- Day Motor Boat (river or coastal boat without cooking facilities and a place suitable for sleeping)
- Other Motor Boat (river or coastal boat with cooking facilities and a place suitable for sleeping)
- Canal Boat (narrowboat or boat designed for inland waterways)
- Sportsboats and RIBS/Inflatables (excluding power boats - usually with an engine and not including seaside inflatables)
- Personal Watercraft e.g. Jetski

In 2009 two new questions were added to the questionnaire. These questions were asked of activity categories, i.e. sailing activities, power/motor boating activities and watersport activities rather than individual activities.

- Respondents who had not participated in any of the activities in a given category in the past 12 months were asked whether they had participated in the past. If this was the case, they were asked why they had stopped participating.
- Respondents who had participated in at least one activity in the respective category in the past 12 months were asked when they started to participate and what made them start.

## The Data

A brief overview of how to interpret the tables is given with Table 1. Each section of the report is supported by written commentary explaining any assumptions made and to assist interpretation of the data. 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 2009

Table 1 Watersports and Leisure Participation 2009 of UK Respondents

|                                                   | Participation rate 2009 |        |        |        |        | Number of participants 2009 (including Northern Ireland) |                                |                                |
|---------------------------------------------------|-------------------------|--------|--------|--------|--------|----------------------------------------------------------|--------------------------------|--------------------------------|
|                                                   | % for 2009              | Min    |        | Max    |        | Number of participants for 2009                          | Min 90% Number of participants | Max 90% Number of participants |
|                                                   |                         | 95%    | 90%    | 90%    | 95%    |                                                          |                                |                                |
| Any Activity                                      | 26.28%                  | 25.52% | 25.64% | 26.93% | 27.05% | 12,892,598                                               | 12,578,000                     | 13,207,000                     |
| Any boating activity                              | 7.21%                   | 6.76%  | 6.83%  | 7.58%  | 7.66%  | 3,534,359                                                | 3,350,000                      | 3,719,000                      |
| Small sailboat activities or yacht cruising       | 1.77%                   | 1.54%  | 1.58%  | 1.97%  | 2.00%  | 869,754                                                  | 775,000                        | 964,000                        |
| Small sailboat racing or yacht racing             | 0.44%                   | 0.33%  | 0.35%  | 0.54%  | 0.56%  | 218,067                                                  | 171,000                        | 266,000                        |
| Motor boating / cruising or canal boating         | 1.60%                   | 1.38%  | 1.42%  | 1.78%  | 1.82%  | 783,693                                                  | 694,000                        | 873,000                        |
| Canoeing                                          | 2.57%                   | 2.30%  | 2.34%  | 2.80%  | 2.85%  | 1,262,478                                                | 1,149,000                      | 1,376,000                      |
| Water skiing                                      | 0.64%                   | 0.50%  | 0.53%  | 0.76%  | 0.78%  | 315,233                                                  | 258,000                        | 372,000                        |
| Small sail boat activities                        | 1.13%                   | 0.95%  | 0.98%  | 1.29%  | 1.32%  | 555,432                                                  | 480,000                        | 631,000                        |
| Rowing/Sculling                                   | 0.71%                   | 0.57%  | 0.59%  | 0.84%  | 0.86%  | 349,587                                                  | 290,000                        | 410,000                        |
| Windsurfing                                       | 0.54%                   | 0.41%  | 0.43%  | 0.64%  | 0.67%  | 263,982                                                  | 212,000                        | 316,000                        |
| Using personal watercraft                         | 0.69%                   | 0.54%  | 0.57%  | 0.81%  | 0.83%  | 336,472                                                  | 278,000                        | 395,000                        |
| Motor boating/Cruising                            | 0.96%                   | 0.79%  | 0.82%  | 1.10%  | 1.13%  | 472,233                                                  | 402,000                        | 542,000                        |
| Yacht cruising                                    | 0.78%                   | 0.63%  | 0.65%  | 0.91%  | 0.94%  | 383,615                                                  | 321,000                        | 447,000                        |
| Power boating                                     | 1.16%                   | 0.98%  | 1.01%  | 1.32%  | 1.35%  | 569,881                                                  | 493,000                        | 646,000                        |
| Small sail boat racing                            | 0.30%                   | 0.21%  | 0.22%  | 0.38%  | 0.40%  | 147,566                                                  | 108,000                        | 187,000                        |
| Canal boating                                     | 0.65%                   | 0.51%  | 0.54%  | 0.77%  | 0.79%  | 320,213                                                  | 263,000                        | 378,000                        |
| Yacht racing                                      | 0.20%                   | 0.12%  | 0.14%  | 0.27%  | 0.28%  | 99,049                                                   | 67,000                         | 131,000                        |
| Surfboarding                                      | 1.32%                   | 1.12%  | 1.15%  | 1.48%  | 1.52%  | 645,827                                                  | 564,000                        | 727,000                        |
| Kitesurfing                                       | 0.11%                   | 0.06%  | 0.07%  | 0.16%  | 0.17%  | 56,397                                                   | 32,000                         | 81,000                         |
| Angling (from a boat)                             | 0.97%                   | 0.80%  | 0.82%  | 1.11%  | 1.14%  | 474,110                                                  | 404,000                        | 544,000                        |
| Angling (from the shore)                          | 1.74%                   | 1.52%  | 1.55%  | 1.94%  | 1.97%  | 855,934                                                  | 762,000                        | 949,000                        |
| Cliff climbing                                    | 0.80%                   | 0.65%  | 0.67%  | 0.93%  | 0.96%  | 393,897                                                  | 330,000                        | 458,000                        |
| Coastal walking                                   | 10.03%                  | 9.50%  | 9.59%  | 10.46% | 10.55% | 4,917,530                                                | 4,703,000                      | 5,132,000                      |
| Outdoor swimming                                  | 10.19%                  | 9.66%  | 9.75%  | 10.63% | 10.72% | 4,998,774                                                | 4,783,000                      | 5,215,000                      |
| Leisure sub-aqua diving (from the shore and boat) | 0.91%                   | 0.74%  | 0.77%  | 1.05%  | 1.07%  | 444,868                                                  | 377,000                        | 513,000                        |
| Spending general leisure time at the beach        | 11.85%                  | 11.29% | 11.38% | 12.32% | 12.41% | 5,812,279                                                | 5,581,000                      | 6,043,000                      |
| Base                                              | 12,683                  |        |        |        |        | 49,051,000                                               | 49,051,000                     | 49,051,000                     |

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

The first column of Table 1 titled '% for 2009' is our best estimate of participation rates for each activity in 2009. The figure of 26.28% is our best estimate for participation in 'any' of the 21 activities. We also show the best estimate of actual participation in any of the original 12 watersports as measured by the survey. This participation rate is 7.21% (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 0.14% and 0.27% of the UK adult population in 2009.

In the next column we convert the participation rate for 2009 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 coastal walking lies between 4,703,000 and 5,215,000 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 2 compares the participation rates as established in the 2009 survey with 2008 participation rates for comparison.

The 2009 data shows a significant increase in participation rates for 'any activity' and 'any boating activity' compared with 2008, by individual activity:

- 8 show statistically significant rises,
- 6 show insignificant rises,
- 2 activities have stayed stable, and
- 5 show a drop insignificant drops participation rates

Significant changes are highlighted in bold in the table below.

In interpreting the figures it is important to consider whether they reflect a real change in participation or a random fluctuation measurement<sup>5</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 changes 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 just a random fluctuation. In 2009 a third of all the changes are considered to be large enough to indicate reliable changes in participation.

Table 2 Difference in Participation Rates 2009-2008

|                                                   | Participation rate 2009 | Participation rate 2008 | Change (percentage points) | Significance  |
|---------------------------------------------------|-------------------------|-------------------------|----------------------------|---------------|
| Any Activity                                      | 26.28%                  | 23.03%                  | <b>3.26%</b>               | <b>100.0%</b> |
| Any boating activity                              | 7.21%                   | 6.20%                   | <b>1.01%</b>               | <b>99.9%</b>  |
| Small sailboat activities or yacht cruising       | 1.77%                   | 1.62%                   | 0.15%                      | 65.1%         |
| Small sailboat racing or yacht racing             | 0.44%                   | 0.38%                   | 0.06%                      | 57.2%         |
| Motor boating / cruising or canal boating         | 1.60%                   | 1.60%                   | 0.00%                      | 1.7%          |
| Canoeing                                          | 2.57%                   | 1.98%                   | <b>0.60%</b>               | <b>99.9%</b>  |
| Water skiing                                      | 0.64%                   | 0.60%                   | 0.04%                      | 34.4%         |
| Small sail boat activities                        | 1.13%                   | 0.87%                   | <b>0.26%</b>               | <b>96.2%</b>  |
| Rowing/Sculling                                   | 0.71%                   | 0.38%                   | <b>0.33%</b>               | <b>100.0%</b> |
| Windsurfing                                       | 0.54%                   | 0.35%                   | <b>0.19%</b>               | <b>97.7%</b>  |
| Using personal watercraft                         | 0.69%                   | 0.69%                   | 0.00%                      | 0.4%          |
| Motor boating/Cruising                            | 0.96%                   | 1.09%                   | -0.13%                     | 70.2%         |
| Yacht cruising                                    | 0.78%                   | 0.85%                   | -0.06%                     | 42.3%         |
| Power boating                                     | 1.16%                   | 0.58%                   | <b>0.58%</b>               | <b>100.0%</b> |
| Small sail boat racing                            | 0.30%                   | 0.25%                   | 0.05%                      | 54.3%         |
| Canal boating                                     | 0.65%                   | 0.54%                   | 0.11%                      | 76.2%         |
| Yacht racing                                      | 0.20%                   | 0.20%                   | 0.00%                      | 4.2%          |
| Surfboarding                                      | 1.32%                   | 1.02%                   | <b>0.29%</b>               | <b>97.0%</b>  |
| Kitesurfing                                       | 0.11%                   | 0.13%                   | -0.02%                     | 32.1%         |
| Angling (from a boat)                             | 0.97%                   | 0.82%                   | 0.14%                      | 77.3%         |
| Angling (from the shore)                          | 1.74%                   | 1.90%                   | -0.15%                     | 64.3%         |
| Cliff climbing                                    | 0.80%                   | 0.72%                   | 0.09%                      | 58.0%         |
| Coastal walking                                   | 10.03%                  | 10.42%                  | -0.40%                     | 70.5%         |
| Outdoor swimming                                  | 10.19%                  | 8.42%                   | <b>1.78%</b>               | <b>100.0%</b> |
| Leisure sub-aqua diving (from the shore and boat) | 0.91%                   | 0.73%                   | 0.17%                      | 87.3%         |
| Spending general leisure time at the beach        | 11.85%                  | 9.01%                   | <b>2.84%</b>               | <b>100.0%</b> |
| Base                                              | 12,683                  | 12,637                  |                            |               |

Source Watersports and Leisure Omnibus Surveys 2009 and 2008 (Base: all respondents – 12,683 and 12,637 adults aged 16+)

<sup>5</sup> For example in 2008 we estimated Water skiing participation at 0.60%, in 2009 we have estimated it at 0.64%. This is an increase of 0.04 percentage points. This increase is significant only at a confidence level of 34.4%. It is usual to only consider changes above the 90% confidence level as statistically significant therefore this increase is interpreted as likely to be a result of random data fluctuation rather than a real change in the participation rate.



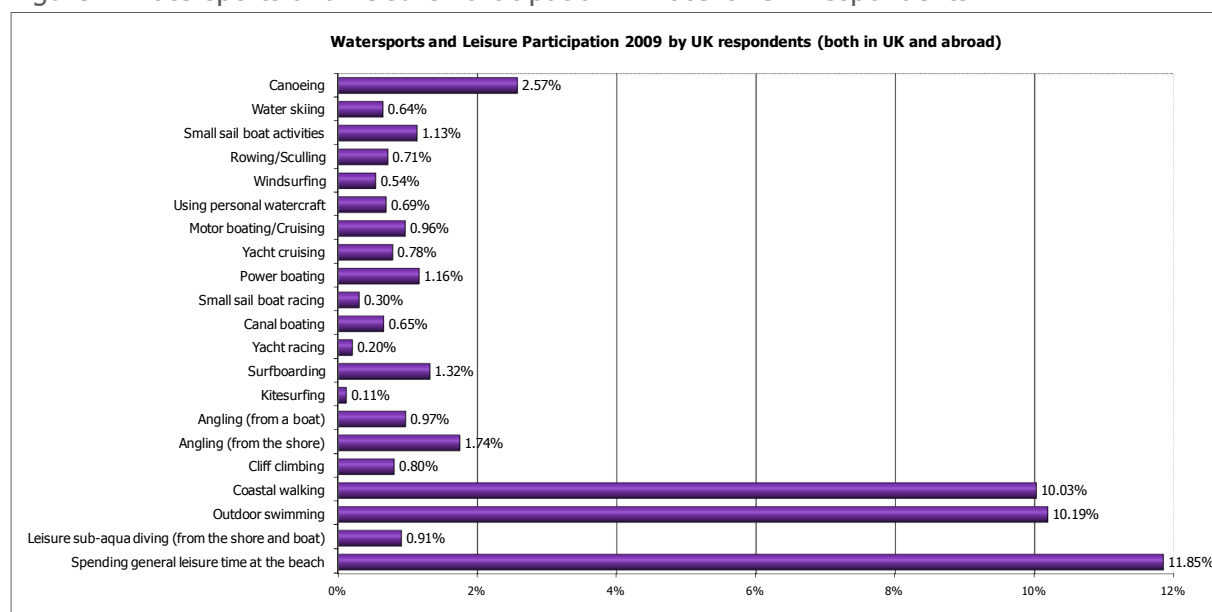
In Table 3 we show the participation rate in activities of particular interest to the RYA, which have been combined into one variable. These are the 12 'any boating activities' bar rowing, water skiing and canoeing. The increase in 2009 compared to 2008 is statistically significant. Figure 1 shows graphically the participation rate in each surveyed activity.

Table 3 Participation in RYA Interests 2009

|                                          | 2008                  | 2009                  |
|------------------------------------------|-----------------------|-----------------------|
| Participation Rate (min and max 90%)     | 4.15% (3.86% - 4.44%) | 4.82% (4.51% - 5.14%) |
| Number of participants (min and max 90%) | 1890970 - 2178730     | 2210720 - 2519880     |
| Base                                     | 12,637                | 12,683                |
| Total Population                         | 49,051,000            | 49,051,000            |

Source Watersports and Leisure Omnibus Surveys 2009 and 2008 (Base: all respondents – 12,683 and 12,637 adults aged 16+)

Figure 1 Watersports and Leisure Participation in 2009 of UK Respondents



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

Of the 12 any boating activities, participation has significantly increased in five of them in 2009. These are (in descending order):

- Canoeing (+0.60 percentage points)
- Power boating (+0.58 percentage points)
- Small sail boat activities (+0.26 percentage points)
- Rowing/Sculling (+0.33 percentage points)
- Windsurfing (+0.19 percentage points)

Of the remaining seven original activities three show statistically insignificant rises (water skiing; +0.04 percentage points, small sail boat racing; +0.05 percentage points and canal boating; +0.11 percentage points), two show statistically not significant drops (motor boating/cruising; -0.13 percentage points and yacht cruising; -0.06 percentage points), while using personal watercraft and yacht racing have not changed at all.

There are 3 significant increases for the other activities. These are (in descending order):

- Spending general leisure time at the beach (+2.84 percentage points)
- Outdoor swimming (+1.78 percentage points)
- Surfboarding (+0.29 percentage points)

## 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 2 shows a linear trend line for 'Any boating activity' from 2002 to 2009 (blue line) and the actual rises and falls in participation (purple dotted line). The regression line for 'Any boating activity' shows a slight declining trend, which over the 8 year period suggests a reduction in participation of approximately 12%.

Figure 2 Overall Trends in Participation for Any Boating Activity 2002 – 2009

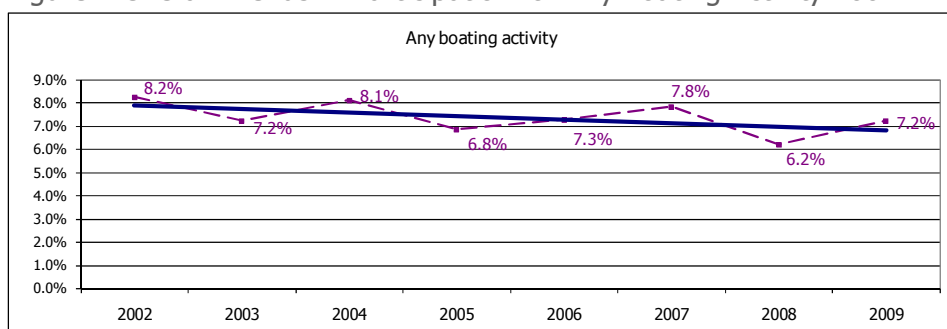
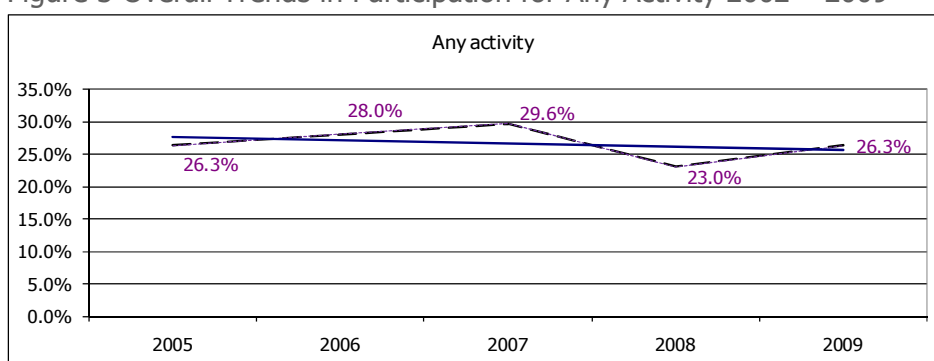


Figure 3 shows the trends for 'any activity' from 2005-2009. The participation rate is now at the same level as in 2005 however we interpret the trend as a long term decline despite the upturn in 2009. The trend is very much influenced by participation rates in popular activities such as 'outdoor swimming' and 'spending general leisure time at the beach'.

Figure 3 Overall Trends in Participation for Any Activity 2002 – 2009



## Trends in Activities

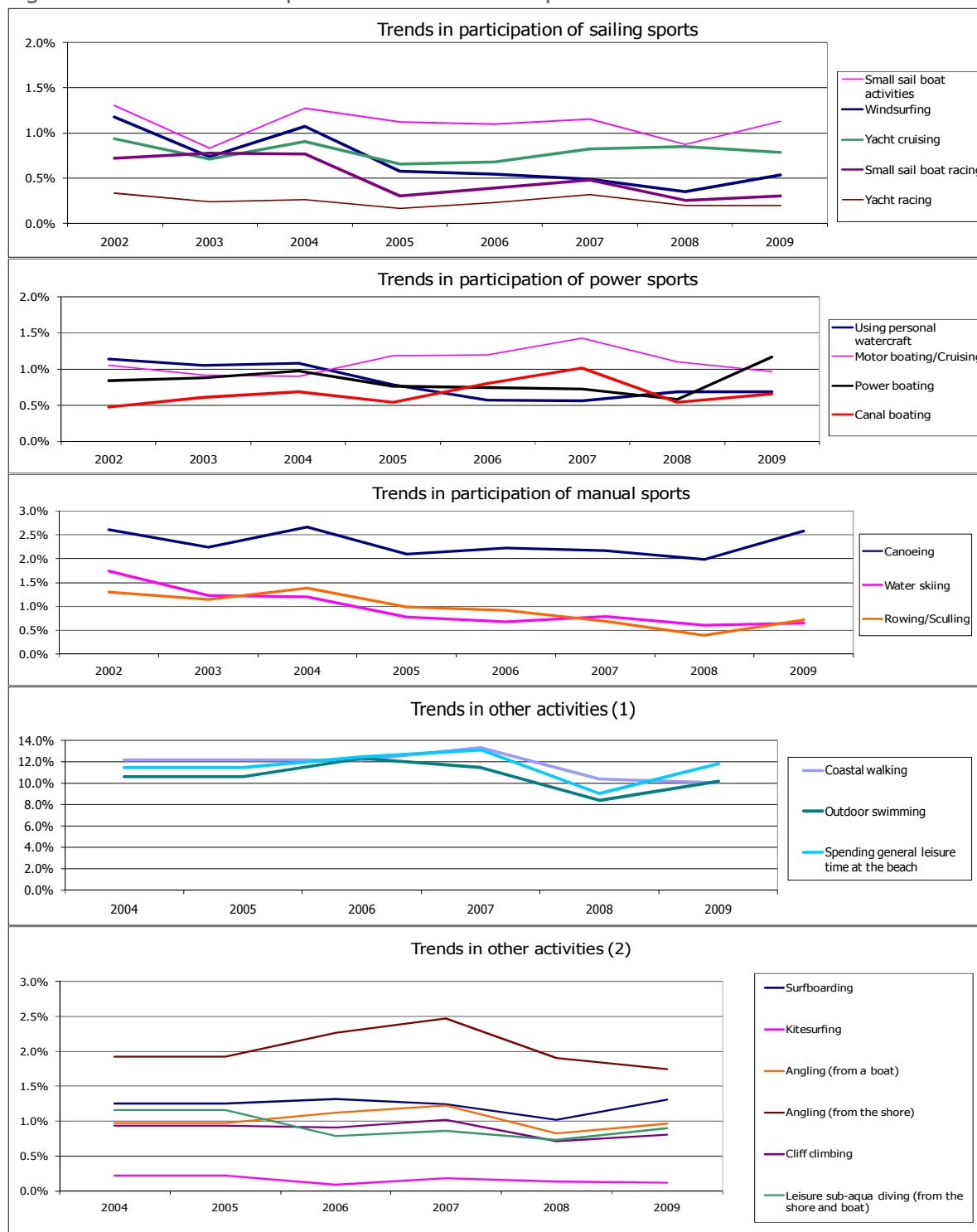
The following charts give insight into the participation trends for activities group into three categories: **sailing sports** - (small sail boat racing, other small sail boat activities, yacht racing, yacht cruising and windsurfing); **power sports** - (power boating, general motor boating, canal boating, and using personal watercraft); **manual sports** - (canoeing, rowing and water-skiing)

Yacht sailing, yacht cruising and small sail boat racing have stayed stable over the past years; the very small fluctuations that have taken place are not significant. Conversely the other sailing sports, windsurfing and other small sail boat activities, have experienced a significant increase in 2009 after a drop in 2008. In power sports, power boating shows considerable growth after reaching a low point in 2008. Canal boating has increased slightly and motor boating/cruising shows a slight decline. Using personal watercraft has remained stable to last year. Manual sports, after showing consistent downward trends in previous years, now show increases for two activities (canoeing and rowing), while participation in water skiing has remained stable.

After large declines in activity in 2008 from 2007 'spending general leisure time at the beach' and 'outdoor swimming' both record increases in 2009. 'Coastal walking', and 'angling from the shore' on the other hand continue to decline. Most of the other activities show slight increases or stable developments.

Since 2002, motor boating/cruising and canal boating remain the only activities which show an upwards trend line of the 12 any boating activities and power boating, yacht cruising and yacht racing show a stable trend.

Figure 4 Trends in Watersports and Leisure Participation 2002 to 2009



## Participation by Socio-Demographic Group

The following tables show participation by age, gender, socio-economic group (SEG) as well as life stage and ethnicity. 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

Overall activity rates for males and females are quite similar (28% for males and 24% for females). However, the gap between male and female participation over 'all activities' has widened slightly in 2009, following a narrowing of the gap in 2008. Males are still more likely to participate in nearly all activities. With respect to the 12 'any boating activities' the difference between male and female participation is much greater, for every 3 males participating there are only 2 active females. This has been the case since 2005. Only 'spending general leisure time at the beach' is more popular for females than for males, 'coastal walking' and 'canal boating' are equally popular for both genders.

The gap between male and female participation is largest in specialist sports. We have highlighted the male participation rate for an activity in blue and bold, if it is more than twice the female participation rate.

Table 4 Participation by Gender (percentage)

|                                                   | Male         | Female     | Total UK   |
|---------------------------------------------------|--------------|------------|------------|
| Any Activity                                      | 28.28%       | 24.41%     | 26.28%     |
| Any boating activity                              | 9.15%        | 5.37%      | 7.21%      |
| Any sailboat activities/yacht cruising            | <b>2.41%</b> | 1.17%      | 1.77%      |
| Any sailboat racing/yacht racing                  | <b>0.70%</b> | 0.20%      | 0.44%      |
| Motor boating / cruising or canal boating         | 1.74%        | 1.47%      | 1.60%      |
| Canoeing                                          | 3.25%        | 1.94%      | 2.57%      |
| Water skiing                                      | <b>0.88%</b> | 0.42%      | 0.6%       |
| Small sail boat activities                        | 1.50%        | 0.79%      | 1.1%       |
| Rowing/Sculling                                   | <b>0.99%</b> | 0.45%      | 0.7%       |
| Windsurfing                                       | <b>0.79%</b> | 0.30%      | 0.5%       |
| Using personal watercraft                         | <b>1.03%</b> | 0.36%      | 0.7%       |
| Motor boating/Cruising                            | 1.12%        | 0.81%      | 1.0%       |
| Yacht cruising                                    | <b>1.15%</b> | 0.43%      | 0.8%       |
| Power boating                                     | <b>1.62%</b> | 0.73%      | 1.2%       |
| Small sail boat racing                            | <b>0.44%</b> | 0.17%      | 0.3%       |
| Canal boating                                     | 0.64%        | 0.66%      | 0.7%       |
| Yacht racing                                      | <b>0.34%</b> | 0.08%      | 0.2%       |
| Surfboarding                                      | <b>1.78%</b> | 0.88%      | 1.3%       |
| Kitesurfing                                       | <b>0.17%</b> | 0.06%      | 0.1%       |
| Angling (from a boat)                             | <b>1.74%</b> | 0.23%      | 1.0%       |
| Angling (from the shore)                          | <b>3.30%</b> | 0.28%      | 1.7%       |
| Cliff climbing                                    | <b>1.12%</b> | 0.51%      | 0.8%       |
| Coastal walking                                   | 10.01%       | 10.04%     | 10.0%      |
| Outdoor swimming                                  | 11.08%       | 9.36%      | 10.2%      |
| Leisure sub-aqua diving (from the shore and boat) | <b>1.43%</b> | 0.41%      | 0.9%       |
| Spending general leisure time at the beach        | 11.30%       | 12.36%     | 11.8%      |
| None                                              | 71.72%       | 75.59%     | 73.7%      |
| UK adult population                               | 23,785,739   | 25,265,261 | 49,051,000 |
| Unweighted Base                                   | 5,859        | 6,824      | 12,683     |

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

Table 5 Participation by Gender (participants)

|                                                   | Male       | Female     | Total UK   |
|---------------------------------------------------|------------|------------|------------|
| Any Activity                                      | 6,725,455  | 6,167,143  | 12,892,598 |
| Any boating activity                              | 2,177,288  | 1,357,072  | 3,534,359  |
| Any sailboat activities/yacht cruising            | 573,002    | 296,752    | 869,754    |
| Any sailboat racing/yacht racing                  | 166,784    | 51,282     | 218,067    |
| Motor boating / cruising or canal boating         | 412,754    | 370,939    | 783,693    |
| Canoeing                                          | 772,293    | 490,185    | 1,262,478  |
| Water skiing                                      | 208,127    | 107,105    | 315,233    |
| Small sail boat activities                        | 355,855    | 199,578    | 555,432    |
| Rowing/Sculling                                   | 235,807    | 113,781    | 349,587    |
| Windsurfing                                       | 186,964    | 77,019     | 263,982    |
| Using personal watercraft                         | 245,692    | 90,780     | 336,472    |
| Motor boating/Cruising                            | 266,547    | 205,686    | 472,233    |
| Yacht cruising                                    | 274,523    | 109,092    | 383,615    |
| Power boating                                     | 385,326    | 184,555    | 569,881    |
| Small sail boat racing                            | 103,665    | 43,901     | 147,566    |
| Canal boating                                     | 152,926    | 167,287    | 320,213    |
| Yacht racing                                      | 79,928     | 19,121     | 99,049     |
| Surfboarding                                      | 422,955    | 222,873    | 645,827    |
| Kitesurfing                                       | 40,036     | 16,361     | 56,397     |
| Angling (from a boat)                             | 415,024    | 59,086     | 474,110    |
| Angling (from the shore)                          | 785,449    | 70,485     | 855,934    |
| Cliff climbing                                    | 265,709    | 128,188    | 393,897    |
| Coastal walking                                   | 2,381,248  | 2,536,282  | 4,917,530  |
| Outdoor swimming                                  | 2,634,867  | 2,363,907  | 4,998,774  |
| Leisure sub-aqua diving (from the shore and boat) | 341,219    | 103,649    | 444,868    |
| Spending general leisure time at the beach        | 2,688,560  | 3,123,719  | 5,812,279  |
| None                                              | 17,060,284 | 19,098,118 | 36,158,402 |
| UK adult population                               | 23,785,739 | 25,265,261 | 49,051,000 |
| Unweighted Base                                   | 5,859      | 6,824      | 12,683     |

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

We also looked male and female participation rates over the past 8 years by activity. Changes in male participation by activity tend to follow the overall trend for most activities. Overall the male trends is stable or downward for most activities. Female participation rates show less variation year on year, and the overall trend in female participation for many activities is very slightly positive.

Table 6 Participation Trends by Gender (percentage)

|                                                   | Male  |       |       |       |       |       |       |       |
|---------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|
|                                                   | 2002  | 2003  | 2004  | 2005  | 2006  | 2007  | 2008  | 2009  |
| Any activity                                      | n/a   | n/a   | n/a   | 28.3% | 29.6% | 31.6% | 24.4% | 28.3% |
| Any boating activity                              | 11.0% | 10.1% | 11.1% | 8.6%  | 8.9%  | 9.6%  | 7.4%  | 9.2%  |
| Small sailboat activities or yacht cruising       | 2.7%  | 1.9%  | 2.5%  | 2.2%  | 1.8%  | 2.4%  | 1.9%  | 2.4%  |
| Small sailboat racing or yacht racing             | 1.2%  | 1.5%  | 1.4%  | 0.6%  | 0.7%  | 1.1%  | 0.6%  | 0.7%  |
| Motor boating / cruising or canal boating         | 1.9%  | 1.8%  | 1.9%  | 1.9%  | 2.2%  | 2.5%  | 1.8%  | 1.7%  |
| Canoeing                                          | 3.6%  | 3.1%  | 3.6%  | 2.9%  | 3.0%  | 2.6%  | 2.4%  | 3.2%  |
| Water skiing                                      | 2.3%  | 1.8%  | 1.8%  | 1.0%  | 1.0%  | 1.2%  | 0.7%  | 0.9%  |
| Small sail boat activities                        | 1.7%  | 0.9%  | 1.5%  | 1.4%  | 1.2%  | 1.4%  | 1.0%  | 1.5%  |
| Rowing                                            | 1.8%  | 1.6%  | 2.0%  | 1.2%  | 1.2%  | 1.0%  | 0.5%  | 1.0%  |
| Windsurfing                                       | 1.6%  | 1.1%  | 1.7%  | 0.8%  | 0.7%  | 0.7%  | 0.6%  | 0.8%  |
| Using personal watercraft                         | 1.9%  | 1.8%  | 1.9%  | 1.1%  | 0.7%  | 0.7%  | 1.0%  | 1.0%  |
| Motor boating/Cruising                            | 1.3%  | 1.3%  | 1.3%  | 1.4%  | 1.6%  | 1.5%  | 1.2%  | 1.1%  |
| Yacht cruising                                    | 1.3%  | 1.0%  | 1.2%  | 0.9%  | 0.7%  | 1.1%  | 1.1%  | 1.2%  |
| Power boating                                     | 1.1%  | 1.2%  | 1.5%  | 1.0%  | 1.0%  | 1.0%  | 0.8%  | 1.6%  |
| Small sail boat racing                            | 0.9%  | 1.2%  | 1.2%  | 0.4%  | 0.5%  | 0.7%  | 0.4%  | 0.4%  |
| Canal boating                                     | 0.5%  | 0.7%  | 0.8%  | 0.5%  | 0.7%  | 1.1%  | 0.6%  | 0.6%  |
| Yacht racing                                      | 0.5%  | 0.4%  | 0.4%  | 0.2%  | 0.3%  | 0.5%  | 0.3%  | 0.3%  |
| Surfboarding                                      | n/a   | n/a   | 1.8%  | 1.7%  | 1.7%  | 1.8%  | 1.3%  | 1.8%  |
| Kitesurfing                                       | n/a   | n/a   | 0.3%  | 0.4%  | 0.1%  | 0.3%  | 0.3%  | 0.2%  |
| Angling (from a boat)                             | n/a   | n/a   | 2.4%  | 1.7%  | 2.0%  | 2.2%  | 1.4%  | 1.7%  |
| Angling (from the shore)                          | n/a   | n/a   | 4.5%  | 3.5%  | 4.0%  | 4.5%  | 3.4%  | 3.3%  |
| Cliff climbing                                    | n/a   | n/a   | 1.4%  | 1.3%  | 1.1%  | 1.4%  | 0.9%  | 1.1%  |
| Coastal walking                                   | n/a   | n/a   | 10.9% | 12.3% | 12.2% | 13.3% | 10.4% | 10.0% |
| Outdoor swimming                                  | n/a   | n/a   | 12.9% | 10.9% | 12.7% | 12.1% | 8.5%  | 11.1% |
| Leisure sub-aqua diving (from the shore and boat) | n/a   | n/a   | 2.3%  | 1.7%  | 0.9%  | 1.2%  | 0.8%  | 1.4%  |
| Spending general leisure time at the beach        | n/a   | n/a   | 10.5% | 10.6% | 11.4% | 11.9% | 8.2%  | 11.3% |

|                                                   | Female |      |       |       |       |       |       |       |
|---------------------------------------------------|--------|------|-------|-------|-------|-------|-------|-------|
|                                                   | 2002   | 2003 | 2004  | 2005  | 2006  | 2007  | 2008  | 2009  |
| Any activity                                      | n/a    | n/a  | n/a   | 24.4% | 26.6% | 27.7% | 21.7% | 24.4% |
| Any boating activity                              | 5.6%   | 4.5% | 5.3%  | 5.2%  | 5.7%  | 6.2%  | 5.1%  | 5.4%  |
| Small sailboat activities or yacht cruising       | 1.4%   | 1.1% | 1.6%  | 1.2%  | 1.6%  | 1.3%  | 1.3%  | 1.2%  |
| Small sailboat racing or yacht racing             | 0.6%   | 0.5% | 0.4%  | 0.3%  | 0.5%  | 0.4%  | 0.2%  | 0.2%  |
| Motor boating / cruising or canal boating         | 1.1%   | 1.0% | 1.1%  | 1.5%  | 1.8%  | 2.2%  | 1.5%  | 1.5%  |
| Canoeing                                          | 1.6%   | 1.4% | 1.7%  | 1.4%  | 1.5%  | 1.7%  | 1.6%  | 1.9%  |
| Water skiing                                      | 1.2%   | 0.7% | 0.6%  | 0.5%  | 0.4%  | 0.4%  | 0.5%  | 0.4%  |
| Small sail boat activities                        | 0.9%   | 0.7% | 1.1%  | 0.8%  | 1.0%  | 0.9%  | 0.8%  | 0.8%  |
| Rowing                                            | 0.8%   | 0.8% | 0.8%  | 0.8%  | 0.6%  | 0.4%  | 0.3%  | 0.5%  |
| Windsurfing                                       | 0.8%   | 0.4% | 0.5%  | 0.4%  | 0.4%  | 0.3%  | 0.1%  | 0.3%  |
| Using personal watercraft                         | 0.5%   | 0.3% | 0.3%  | 0.4%  | 0.4%  | 0.4%  | 0.4%  | 0.4%  |
| Motor boating/Cruising                            | 0.8%   | 0.6% | 0.5%  | 1.0%  | 0.8%  | 1.3%  | 1.0%  | 0.8%  |
| Yacht cruising                                    | 0.6%   | 0.5% | 0.6%  | 0.4%  | 0.7%  | 0.5%  | 0.6%  | 0.4%  |
| Power boating                                     | 0.6%   | 0.6% | 0.5%  | 0.5%  | 0.5%  | 0.4%  | 0.4%  | 0.7%  |
| Small sail boat racing                            | 0.6%   | 0.4% | 0.4%  | 0.2%  | 0.3%  | 0.3%  | 0.1%  | 0.2%  |
| Canal boating                                     | 0.4%   | 0.5% | 0.6%  | 0.6%  | 0.9%  | 0.9%  | 0.5%  | 0.7%  |
| Yacht racing                                      | 0.2%   | 0.1% | 0.2%  | 0.1%  | 0.2%  | 0.2%  | 0.1%  | 0.1%  |
| Surfboarding                                      | n/a    | n/a  | 0.7%  | 0.9%  | 0.9%  | 0.8%  | 0.7%  | 0.9%  |
| Kitesurfing                                       | n/a    | n/a  | 0.1%  | 0.1%  | 0.1%  | 0.1%  | 0.0%  | 0.1%  |
| Angling (from a boat)                             | n/a    | n/a  | 0.3%  | 0.3%  | 0.3%  | 0.3%  | 0.3%  | 0.2%  |
| Angling (from the shore)                          | n/a    | n/a  | 0.5%  | 0.5%  | 0.6%  | 0.5%  | 0.5%  | 0.3%  |
| Cliff climbing                                    | n/a    | n/a  | 0.8%  | 0.6%  | 0.7%  | 0.7%  | 0.5%  | 0.5%  |
| Coastal walking                                   | n/a    | n/a  | 10.1% | 12.0% | 12.3% | 13.4% | 10.5% | 10.0% |
| Outdoor swimming                                  | n/a    | n/a  | 11.6% | 10.3% | 12.0% | 10.8% | 8.4%  | 9.4%  |
| Leisure sub-aqua diving (from the shore and boat) | n/a    | n/a  | 0.8%  | 0.7%  | 0.7%  | 0.6%  | 0.6%  | 0.4%  |
| Spending general leisure time at the beach        | n/a    | n/a  | 9.9%  | 12.3% | 13.6% | 14.3% | 9.8%  | 12.4% |

Figure 5 shows the regression trend lines of participation for any boating activity for males and females over the 8 years. This shows that participation rates for females show a slight increase, whereas males show a steady decline.

Figure 5 Overall Trends in Participation for 'Any Boating Activity' by Gender

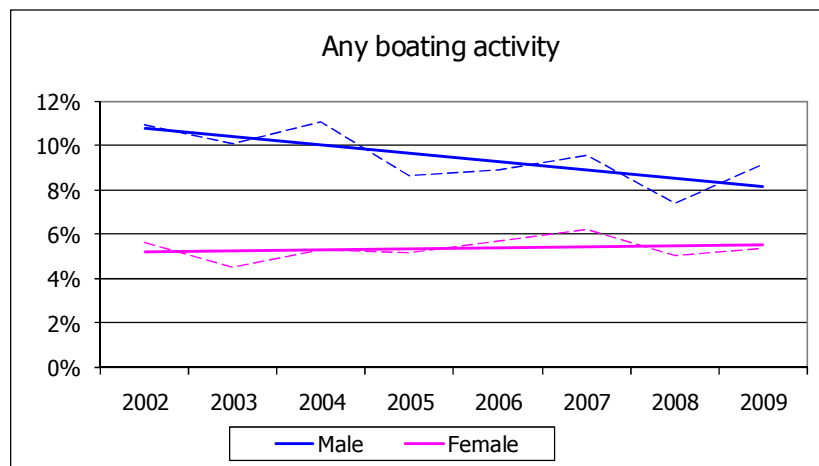
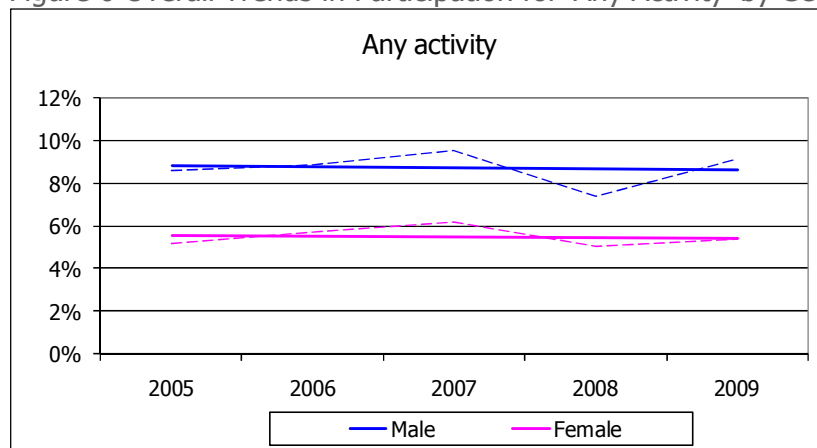


Figure 6 overleaf shows the regression lines for participation in any of the activities asked about from 2005 to 2009. The dotted lines displays the actual falls and rises over the years. Female participation shows a stable line, while male participation shows a much less steep decline than for 'any boating activity'.

Figure 6 Overall Trends in Participation for 'Any Activity' by Gender



### Participation by Age

After a drop in activity across all age groups in 2008 the 2009 participation rates in most activities show a recovery. As in previous years people in the 35-54 age group are the most active across 'any activity', and the under 35s remain the most active age group for the more strenuous 'any boating activities'. For each activity the age group with the highest proportion of participants has been highlighted in blue and bold.

35 to 54 year olds, had reduced their participation in 2008 in 20 out of the 21 activities, but in 2009 have increases in 15 activities. The under 35s have also seen an increase in 15 activities while for the 55+ it is 11 activities.

31% of the 35-54 age group participated in at least one activity over the last 12 months. They recorded a smaller decline in participation in 2008 than the younger age group and in 2009 they show a smaller increase, suggesting that they are more stable in their participation patterns.

Table 7 Participation by Age Group (percentage)

|                                                   | Age groups    |               |               | Total UK   |
|---------------------------------------------------|---------------|---------------|---------------|------------|
|                                                   | 16-34         | 35-54         | 55+           |            |
| Any Activity                                      | 29.69%        | <b>30.95%</b> | 18.51%        | 26.28%     |
| Any boating activity                              | <b>10.13%</b> | 8.64%         | 3.18%         | 7.21%      |
| Any sailboat activities/yacht cruising            | 1.80%         | <b>2.20%</b>  | 1.31%         | 1.77%      |
| Any sailboat racing/yacht racing                  | <b>0.55%</b>  | 0.55%         | 0.24%         | 0.44%      |
| Motor boating / cruising or canal boating         | 1.67%         | <b>1.87%</b>  | 1.26%         | 1.60%      |
| Canoeing                                          | <b>4.21%</b>  | 3.13%         | 0.58%         | 2.57%      |
| Water skiing                                      | <b>1.33%</b>  | 0.53%         | 0.16%         | 0.64%      |
| Small sail boat activities                        | 1.16%         | <b>1.48%</b>  | 0.75%         | 1.13%      |
| Rowing/Sculling                                   | <b>1.44%</b>  | 0.51%         | 0.29%         | 0.71%      |
| Windsurfing                                       | <b>0.92%</b>  | 0.64%         | 0.09%         | 0.54%      |
| Using personal watercraft                         | <b>1.64%</b>  | 0.51%         | 0.04%         | 0.69%      |
| Motor boating/Cruising                            | <b>1.07%</b>  | 1.06%         | 0.77%         | 0.96%      |
| Yacht cruising                                    | 0.78%         | <b>0.89%</b>  | 0.67%         | 0.78%      |
| Power boating                                     | 1.60%         | <b>1.73%</b>  | 0.19%         | 1.16%      |
| Small sail boat racing                            | <b>0.42%</b>  | 0.38%         | 0.12%         | 0.30%      |
| Canal boating                                     | 0.61%         | <b>0.81%</b>  | 0.53%         | 0.65%      |
| Yacht racing                                      | 0.21%         | <b>0.23%</b>  | 0.17%         | 0.20%      |
| Surfboarding                                      | <b>2.73%</b>  | 1.30%         | 0.10%         | 1.32%      |
| Kitesurfing                                       | <b>0.29%</b>  | 0.06%         | 0.02%         | 0.11%      |
| Angling (from a boat)                             | 1.05%         | <b>1.20%</b>  | 0.66%         | 0.97%      |
| Angling (from the shore)                          | 1.97%         | <b>2.17%</b>  | 1.11%         | 1.74%      |
| Cliff climbing                                    | <b>1.51%</b>  | 0.84%         | 0.15%         | 0.80%      |
| Coastal walking                                   | 7.58%         | <b>13.04%</b> | 9.04%         | 10.03%     |
| Outdoor swimming                                  | <b>13.58%</b> | 12.84%        | 4.51%         | 10.19%     |
| Leisure sub-aqua diving (from the shore and boat) | <b>1.33%</b>  | 1.18%         | 0.25%         | 0.91%      |
| Spending general leisure time at the beach        | 12.08%        | <b>14.71%</b> | 8.70%         | 11.85%     |
| None                                              | 70.31%        | 69.05%        | <b>81.49%</b> | 73.72%     |
| UK adult population                               | 14,695,003    | 17,447,606    | 16,908,391    | 49,051,000 |
| Unweighted Base                                   | 3,358         | 4,097         | 5,228         | 12,683     |

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

The larger number of people in the 35-54 age groups reduces the absolute differences, for example the number of people participating in 'any boating activity' is higher in the 35-54 age group despite the fact that 16-34 year olds have a higher participation rate. For each activity the age group with the highest absolute number of participants has been highlighted in blue and bold.

Table 8 Participation by Age Group (participants)

|                                                   | Age groups     |                  |                   | Total UK   |
|---------------------------------------------------|----------------|------------------|-------------------|------------|
|                                                   | 16-34          | 35-54            | 55+               |            |
| Any Activity                                      | 4,362,939      | <b>5,399,563</b> | 3,130,097         | 12,892,598 |
| Any boating activity                              | 1,488,265      | <b>1,507,684</b> | 538,410           | 3,534,359  |
| Any sailboat activities/yacht cruising            | 264,758        | <b>384,037</b>   | 220,959           | 869,754    |
| Any sailboat racing/yacht racing                  | 81,372         | <b>95,472</b>    | 41,223            | 218,067    |
| Motor boating / cruising or canal boating         | 245,435        | <b>325,745</b>   | 212,512           | 783,693    |
| Canoeing                                          | <b>618,123</b> | 545,846          | 98,508            | 1,262,478  |
| Water skiing                                      | <b>196,117</b> | 92,372           | 26,744            | 315,233    |
| Small sail boat activities                        | 170,666        | <b>257,394</b>   | 127,373           | 555,432    |
| Rowing/Sculling                                   | <b>211,648</b> | 89,431           | 48,508            | 349,587    |
| Windsurfing                                       | <b>135,787</b> | 112,390          | 15,805            | 263,982    |
| Using personal watercraft                         | <b>240,658</b> | 89,007           | 6,807             | 336,472    |
| Motor boating/Cruising                            | 157,307        | <b>185,246</b>   | 129,681           | 472,233    |
| Yacht cruising                                    | 114,575        | <b>156,028</b>   | 113,012           | 383,615    |
| Power boating                                     | 235,065        | <b>302,004</b>   | 32,812            | 569,881    |
| Small sail boat racing                            | 61,295         | <b>65,664</b>    | 20,608            | 147,566    |
| Canal boating                                     | 90,163         | <b>140,499</b>   | 89,552            | 320,213    |
| Yacht racing                                      | 30,407         | <b>40,331</b>    | 28,311            | 99,049     |
| Surfboarding                                      | <b>401,504</b> | 226,623          | 17,700            | 645,827    |
| Kitesurfing                                       | <b>42,323</b>  | 10,280           | 3,795             | 56,397     |
| Angling (from a boat)                             | 154,146        | <b>209,103</b>   | 110,862           | 474,110    |
| Angling (from the shore)                          | 289,611        | <b>378,205</b>   | 188,118           | 855,934    |
| Cliff climbing                                    | <b>221,599</b> | 146,113          | 26,185            | 393,897    |
| Coastal walking                                   | 1,114,154      | <b>2,275,679</b> | 1,527,697         | 4,917,530  |
| Outdoor swimming                                  | 1,995,585      | <b>2,239,818</b> | 763,372           | 4,998,774  |
| Leisure sub-aqua diving (from the shore and boat) | 195,766        | <b>206,736</b>   | 42,366            | 444,868    |
| Spending general leisure time at the beach        | 1,775,211      | <b>2,566,642</b> | 1,470,425         | 5,812,279  |
| None                                              | 10,332,064     | 12,048,044       | <b>13,778,294</b> | 36,158,402 |
| UK adult population                               | 14,695,003     | 17,447,606       | 16,908,391        | 49,051,000 |
| Unweighted Base                                   | 3,358          | 4,097            | 5,228             | 12,683     |

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



When looking at participation by age over the past 8 years, despite occasional annual increases the 16-34 age group has been in significant overall decline for all measured activities (except canal boating). The 35-54 age group has seen a slight increase in participation and the 55+ age group shows a stable picture for most activities.

Table 9 Participation Trends by Age 2002 -2009

|                                                   | 16-34 |       |       |       |       |       |       |       |  |
|---------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|--|
|                                                   | 2002  | 2003  | 2004  | 2005  | 2006  | 2007  | 2008  | 2009  |  |
| Any activity                                      | n/a   | n/a   | n/a   | 32.0% | 32.7% | 33.7% | 29.7% |       |  |
| Any boating activity                              | 15.0% | 12.8% | 12.9% | 11.4% | 10.6% | 10.9% | 10.1% |       |  |
| Any sailboat activities/yacht cruising            | 2.5%  | 2.1%  | 2.9%  | 2.1%  | 2.1%  | 2.0%  | 1.8%  |       |  |
| Any sailboat racing/yacht racing                  | 1.6%  | 1.7%  | 1.6%  | 0.7%  | 0.8%  | 0.9%  | 0.6%  |       |  |
| Motor boating / cruising or canal boating         | 2.0%  | 2.1%  | 1.8%  | 2.1%  | 2.4%  | 2.5%  | 1.7%  |       |  |
| Canoeing                                          | 5.5%  | 4.7%  | 5.3%  | 4.3%  | 3.8%  | 3.7%  | 4.2%  |       |  |
| Water skiing                                      | 3.6%  | 2.8%  | 2.3%  | 1.6%  | 1.3%  | 1.4%  | 1.3%  |       |  |
| Small sail boat activities                        | 1.6%  | 1.1%  | 2.3%  | 1.7%  | 1.5%  | 1.3%  | 1.2%  |       |  |
| Rowing/Sculling                                   | 2.5%  | 2.5%  | 2.8%  | 1.9%  | 1.6%  | 1.2%  | 1.4%  |       |  |
| Windsurfing                                       | 2.1%  | 1.3%  | 1.9%  | 1.2%  | 1.1%  | 0.8%  | 0.9%  |       |  |
| Using personal watercraft                         | 2.7%  | 2.5%  | 1.8%  | 1.5%  | 1.1%  | 1.1%  | 1.6%  |       |  |
| Motor boating/Cruising                            | 1.6%  | 1.4%  | 1.3%  | 1.5%  | 1.7%  | 1.6%  | 1.1%  |       |  |
| Yacht cruising                                    | 1.3%  | 1.0%  | 0.9%  | 0.6%  | 0.7%  | 0.7%  | 0.8%  |       |  |
| Power boating                                     | 1.5%  | 1.7%  | 1.4%  | 1.2%  | 0.9%  | 0.9%  | 1.6%  |       |  |
| Small sail boat racing                            | 1.3%  | 1.3%  | 1.4%  | 0.6%  | 0.5%  | 0.7%  | 0.4%  |       |  |
| Canal boating                                     | 0.3%  | 0.9%  | 0.5%  | 0.6%  | 0.8%  | 1.0%  | 0.6%  |       |  |
| Yacht racing                                      | 0.6%  | 0.5%  | 0.4%  | 0.1%  | 0.3%  | 0.3%  | 0.2%  |       |  |
| Surfboarding                                      | n/a   | n/a   | 2.4%  | 2.7%  | 3.0%  | 2.3%  | 2.7%  |       |  |
| Kitesurfing                                       | n/a   | n/a   | 0.4%  | 0.5%  | 0.2%  | 0.3%  | 0.3%  |       |  |
| Angling (from a boat)                             | n/a   | n/a   | 1.5%  | 1.1%  | 1.3%  | 1.1%  | 1.0%  |       |  |
| Angling (from the shore)                          | n/a   | n/a   | 2.9%  | 2.2%  | 2.2%  | 2.5%  | 2.0%  |       |  |
| Cliff climbing                                    | n/a   | n/a   | 2.0%  | 2.2%  | 1.8%  | 1.8%  | 1.5%  |       |  |
| Coastal walking                                   | n/a   | n/a   | 8.3%  | 10.9% | 11.0% | 11.1% | 7.6%  |       |  |
| Outdoor swimming                                  | n/a   | n/a   | 15.8% | 14.9% | 16.8% | 15.7% | 13.6% |       |  |
| Leisure sub-aqua diving (from the shore and boat) | n/a   | n/a   | 2.6%  | 2.0%  | 0.9%  | 1.3%  | 1.3%  |       |  |
| Spending general leisure time at the beach        | n/a   | n/a   | 10.6% | 12.8% | 14.6% | 14.2% | 12.1% |       |  |
|                                                   | 55+   |       |       |       |       |       |       |       |  |
|                                                   | 2002  | 2003  | 2004  | 2005  | 2006  | 2007  | 2008  | 2009  |  |
| Any activity                                      | n/a   | n/a   | n/a   | 17.4% | 18.8% | 20.4% | 17.0% | 18.5% |  |
| Any boating activity                              | 2.8%  | 2.2%  | 2.8%  | 2.7%  | 3.0%  | 3.3%  | 3.0%  | 3.2%  |  |
| Any sailboat activities/yacht cruising            | 1.2%  | 1.1%  | 1.2%  | 1.3%  | 0.8%  | 1.1%  | 1.2%  | 1.3%  |  |
| Any sailboat racing/yacht racing                  | 0.2%  | 0.6%  | 0.4%  | 0.3%  | 0.2%  | 0.3%  | 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%  |  |
| Canoeing                                          | 0.3%  | 0.4%  | 0.3%  | 0.4%  | 0.5%  | 0.2%  | 0.2%  | 0.6%  |  |
| Water skiing                                      | 0.2%  | 0.0%  | 0.2%  | 0.1%  | 0.1%  | 0.1%  | 0.0%  | 0.2%  |  |
| Small sail boat activities                        | 0.6%  | 0.6%  | 0.4%  | 0.8%  | 0.3%  | 0.5%  | 0.5%  | 0.8%  |  |
| Rowing/Sculling                                   | 0.2%  | 0.3%  | 0.4%  | 0.2%  | 0.3%  | 0.1%  | 0.2%  | 0.3%  |  |
| Windsurfing                                       | 0.1%  | 0.1%  | 0.1%  | 0.0%  | 0.0%  | 0.1%  | 0.0%  | 0.1%  |  |
| Using personal watercraft                         | 0.1%  | 0.0%  | 0.2%  | 0.1%  | 0.0%  | 0.1%  | 0.0%  | 0.0%  |  |
| Motor boating/Cruising                            | 0.6%  | 0.3%  | 0.2%  | 0.5%  | 0.9%  | 0.8%  | 0.9%  | 0.8%  |  |
| Yacht cruising                                    | 0.7%  | 0.5%  | 0.8%  | 0.5%  | 0.6%  | 0.7%  | 0.8%  | 0.7%  |  |
| Power boating                                     | 0.3%  | 0.3%  | 0.0%  | 0.3%  | 0.3%  | 0.4%  | 0.2%  | 0.2%  |  |
| Small sail boat racing                            | 0.2%  | 0.4%  | 0.3%  | 0.1%  | 0.2%  | 0.1%  | 0.1%  | 0.1%  |  |
| Canal boating                                     | 0.4%  | 0.4%  | 0.5%  | 0.6%  | 0.6%  | 0.7%  | 0.6%  | 0.5%  |  |
| Yacht racing                                      | 0.0%  | 0.2%  | 0.1%  | 0.1%  | 0.1%  | 0.2%  | 0.2%  | 0.2%  |  |
| Surfboarding                                      | n/a   | n/a   | 0.1%  | 0.1%  | 0.1%  | 0.1%  | 0.1%  | 0.1%  |  |
| Kitesurfing                                       | n/a   | n/a   | 0.0%  | 0.0%  | 0.0%  | 0.0%  | 0.0%  | 0.0%  |  |
| Angling (from a boat)                             | n/a   | n/a   | 0.7%  | 0.5%  | 0.5%  | 1.0%  | 0.7%  | 0.7%  |  |
| Angling (from the shore)                          | n/a   | n/a   | 1.2%  | 0.7%  | 1.4%  | 1.4%  | 1.6%  | 1.1%  |  |
| Cliff climbing                                    | n/a   | n/a   | 0.2%  | 0.1%  | 0.2%  | 0.2%  | 0.1%  | 0.2%  |  |
| Coastal walking                                   | n/a   | n/a   | 9.2%  | 9.8%  | 9.9%  | 11.2% | 9.9%  | 9.0%  |  |
| Outdoor swimming                                  | n/a   | n/a   | 5.2%  | 4.7%  | 5.9%  | 4.8%  | 4.1%  | 4.5%  |  |
| Leisure sub-aqua diving (from the shore and boat) | n/a   | n/a   | 0.4%  | 0.3%  | 0.2%  | 0.2%  | 0.2%  | 0.3%  |  |
| Spending general leisure time at the beach        | n/a   | n/a   | 5.8%  | 7.3%  | 7.8%  | 8.7%  | 6.0%  | 8.7%  |  |

Figure 7 shows the best fit trend lines of participation for 'any boating activity' for the 3 age groups over the 8 years. The very significant decline in participation among 16-34 year olds is a cause for concern as this age group will be essential to maintain future active participation.

Figure 7 Overall Trends in Participation for 'Any Boating Activity' by Age

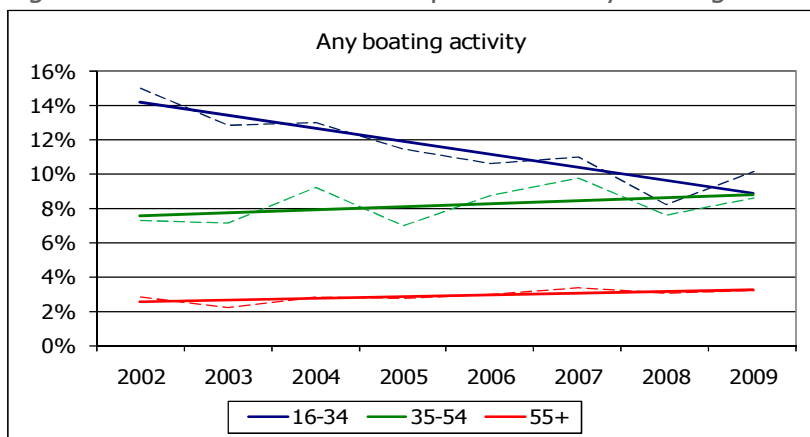
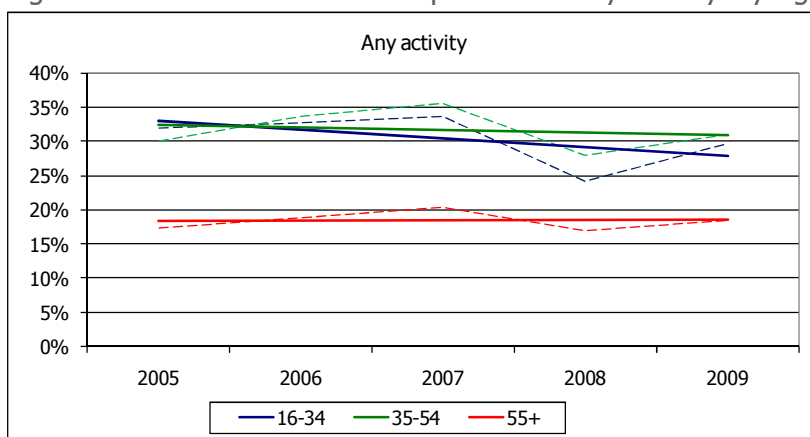


Figure 8 Overall Trends in Participation for 'Any activity' by Age



### Participation by SEG

The socio-economic group AB<sup>6</sup> has generally a substantially higher participation rate than the other groups. 39% of this group participated in at least one of the measured activities over the last 12 months (up from 35% in 2008). The gap for all activities between the AB and C1 groups has stayed very similar in 2009 compared to 2008, with a difference of 8.6% between these two groups in 2009 compared to 8.8% in 2008.

In 2009 only two activities - kitesurfing and angling from the shore - are more popular in the C1-E groups than in the AB group. This is similar to 2007, however in 2008 there were 6 activities with higher participation rates in the C1-E groups. For each activity the age group with the highest proportion of participants has been highlighted in blue and bold in Table 10.

<sup>6</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 10 Participation by SEG (percentages)

|                                                   | SEG           |              |               |            |
|---------------------------------------------------|---------------|--------------|---------------|------------|
|                                                   | AB            | C1           | C2DE          | Total UK   |
| Any Activity                                      | <b>38.79%</b> | 30.20%       | 19.04%        | 26.28%     |
| Any boating activity                              | <b>12.20%</b> | 8.46%        | 4.49%         | 7.21%      |
| Any sailboat activities/yacht cruising            | <b>4.07%</b>  | 1.87%        | 0.80%         | 1.77%      |
| Any sailboat racing/yacht racing                  | <b>0.65%</b>  | 0.54%        | 0.30%         | 0.44%      |
| Motor boating / cruising or canal boating         | <b>2.63%</b>  | 1.64%        | 1.16%         | 1.60%      |
| Canoeing                                          | <b>4.28%</b>  | 3.42%        | 1.41%         | 2.57%      |
| Water skiing                                      | <b>1.00%</b>  | 0.90%        | 0.35%         | 0.64%      |
| Small sail boat activities                        | <b>2.66%</b>  | 1.16%        | 0.51%         | 1.13%      |
| Rowing/Sculling                                   | <b>1.18%</b>  | 0.99%        | 0.36%         | 0.71%      |
| Windsurfing                                       | <b>1.17%</b>  | 0.54%        | 0.29%         | 0.54%      |
| Using personal watercraft                         | <b>1.25%</b>  | 0.65%        | 0.48%         | 0.69%      |
| Motor boating/Cruising                            | <b>1.61%</b>  | 1.01%        | 0.68%         | 0.96%      |
| Yacht cruising                                    | <b>1.78%</b>  | 0.86%        | 0.34%         | 0.78%      |
| Power boating                                     | <b>2.11%</b>  | 1.33%        | 0.69%         | 1.16%      |
| Small sail boat racing                            | <b>0.46%</b>  | 0.34%        | 0.21%         | 0.30%      |
| Canal boating                                     | <b>1.09%</b>  | 0.63%        | 0.49%         | 0.65%      |
| Yacht racing                                      | <b>0.31%</b>  | 0.25%        | 0.13%         | 0.20%      |
| Surfboarding                                      | <b>2.12%</b>  | 1.76%        | 0.74%         | 1.32%      |
| Kitesurfing                                       | 0.10%         | <b>0.20%</b> | 0.07%         | 0.11%      |
| Angling (from a boat)                             | <b>1.18%</b>  | 1.01%        | 0.85%         | 0.97%      |
| Angling (from the shore)                          | 1.54%         | <b>1.85%</b> | 1.77%         | 1.74%      |
| Cliff climbing                                    | <b>1.12%</b>  | 1.06%        | 0.53%         | 0.80%      |
| Coastal walking                                   | <b>18.07%</b> | 11.40%       | 6.02%         | 10.03%     |
| Outdoor swimming                                  | <b>15.70%</b> | 12.80%       | 6.49%         | 10.19%     |
| Leisure sub-aqua diving (from the shore and boat) | <b>1.31%</b>  | 1.27%        | 0.54%         | 0.91%      |
| Spending general leisure time at the beach        | <b>17.68%</b> | 13.03%       | 8.84%         | 11.85%     |
| None                                              | 61.21%        | 69.80%       | <b>80.96%</b> | 73.72%     |
| UK adult population                               | 9,902,680     | 14,316,459   | 24,831,861    | 49,051,000 |
| Unweighted Base                                   | 2,334         | 3,263        | 7,086         | 12683      |

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

The much greater number of people in the C1 and C2DE socio-economic group compared to those in the AB group means that despite lower participation rates for most of the activities, they are often the largest participation group in absolute numbers. For example, the participation rate for canoeing is 4.3% for AB and 3.4% for the C1 group, however this equates to 423,989 and 489,423 people respectively. For each activity the socio-economic group with the highest absolute number of participants has been highlighted in blue and bold.

Table 11 Participation by SEG (participants)

|                                                   | SEG              |                  |                   |            |
|---------------------------------------------------|------------------|------------------|-------------------|------------|
|                                                   | AB               | C1               | C2DE              | Total UK   |
| Any Activity                                      | 3,841,676        | 4,323,721        | <b>4,727,202</b>  | 12,892,598 |
| Any boating activity                              | 1,208,397        | <b>1,211,853</b> | 1,114,110         | 3,534,359  |
| Any sailboat activities/yacht cruising            | <b>403,320</b>   | 268,081          | 198,352           | 869,754    |
| Any sailboat racing/yacht racing                  | 64,613           | <b>78,000</b>    | 75,455            | 218,067    |
| Motor boating / cruising or canal boating         | 260,200          | 234,680          | <b>288,813</b>    | 783,693    |
| Canoeing                                          | 423,989          | <b>489,423</b>   | 349,066           | 1,262,478  |
| Water skiing                                      | 98,600           | <b>128,691</b>   | 87,942            | 315,233    |
| Small sail boat activities                        | <b>263,886</b>   | 165,964          | 125,582           | 555,432    |
| Rowing/Sculling                                   | 116,907          | <b>142,242</b>   | 90,438            | 349,587    |
| Windsurfing                                       | <b>115,387</b>   | 76,598           | 71,997            | 263,982    |
| Using personal watercraft                         | <b>123,632</b>   | 93,384           | 119,456           | 336,472    |
| Motor boating/Cruising                            | 159,362          | 144,286          | <b>168,586</b>    | 472,233    |
| Yacht cruising                                    | <b>175,912</b>   | 122,763          | 84,940            | 383,615    |
| Power boating                                     | <b>208,752</b>   | 190,884          | 170,244           | 569,881    |
| Small sail boat racing                            | 45,886           | <b>48,385</b>    | <b>53,295</b>     | 147,566    |
| Canal boating                                     | 107,558          | 90,395           | <b>122,261</b>    | 320,213    |
| Yacht racing                                      | 30,702           | <b>35,857</b>    | <b>32,490</b>     | 99,049     |
| Surfboarding                                      | 209,723          | <b>252,337</b>   | 183,768           | 645,827    |
| Kitesurfing                                       | 10,095           | <b>28,790</b>    | <b>17,512</b>     | 56,397     |
| Angling (from a boat)                             | 117,133          | <b>144,746</b>   | <b>212,231</b>    | 474,110    |
| Angling (from the shore)                          | 152,159          | <b>265,274</b>   | <b>438,502</b>    | 855,934    |
| Cliff climbing                                    | 110,512          | <b>151,152</b>   | <b>132,232</b>    | 393,897    |
| Coastal walking                                   | <b>1,789,805</b> | 1,631,816        | 1,495,909         | 4,917,530  |
| Outdoor swimming                                  | 1,554,981        | <b>1,833,170</b> | <b>1,610,624</b>  | 4,998,774  |
| Leisure sub-aqua diving (from the shore and boat) | 129,374          | <b>181,479</b>   | <b>134,016</b>    | 444,868    |
| Spending general leisure time at the beach        | 1,750,473        | <b>1,865,971</b> | <b>2,195,834</b>  | 5,812,279  |
| None                                              | 6,061,004        | 9,992,738        | <b>20,104,659</b> | 36,158,402 |
| UK adult population                               | 9,902,680        | 14,316,459       | 24,831,861        | 49,051,000 |
| Unweighted Base                                   | 2,334            | 3,263            | 7,086             | 12683      |

Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents - 12,683 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 201 to 737 respondents. This means the statistics within these are less reliable than the national estimates.

Those with a White Irish background are much more likely to have participated in the activities asked about given 31.2% of them having participated in at least one activity over the last 12 months (down from 37.7% in 2008). They show the highest participation rate in 9 of the 21 activities asked about. However, this is many fewer than in 2008 when it was 15 activities. White British are more likely to have participated in motor boating/cruising, canal boating, surfboarding and leisure sub aqua diving. Those from an Asian background are least likely to have participated in any of the activities. The highest participation rate for each activity is highlighted in blue.

Table 12 Participation by Ethnicity (percentages)

|                                                   | White British | White Irish   | Other White background | Asian     | Black         | Mixed/ Other | Total      |
|---------------------------------------------------|---------------|---------------|------------------------|-----------|---------------|--------------|------------|
| Any Activity                                      | 27.9%         | <b>31.16%</b> | 28.27%                 | 10.82%    | 6.66%         | 21.64%       | 26.28%     |
| Any boating activity                              | 7.8%          | <b>9.18%</b>  | 7.07%                  | 2.73%     | 1.34%         | 4.76%        | 7.21%      |
| Any sailboat activities/yacht cruising            | <b>1.9%</b>   | 1.84%         | 1.71%                  | 0.30%     | 1.08%         | 1.49%        | 1.77%      |
| Any sailboat racing/yacht racing                  | 0.5%          | <b>1.04%</b>  | 0.54%                  | 0.00%     | 0.00%         | 0.00%        | 0.44%      |
| Motor boating / cruising or canal boating         | <b>1.8%</b>   | 0.98%         | 0.91%                  | 0.85%     | 0.00%         | 0.33%        | 1.60%      |
| Canoeing                                          | 2.86%         | <b>3.83%</b>  | 1.96%                  | 0.28%     | 0.25%         | 1.31%        | 2.57%      |
| Water skiing                                      | 0.62%         | 0.94%         | 1.01%                  | 0.61%     | 0.25%         | <b>1.14%</b> | 0.64%      |
| Small sail boat activities                        | 1.24%         | <b>1.33%</b>  | 0.97%                  | 0.19%     | 0.25%         | 0.83%        | 1.13%      |
| Rowing/Sculling                                   | 0.72%         | 1.10%         | 0.98%                  | 0.35%     | 0.25%         | <b>1.30%</b> | 0.71%      |
| Windsurfing                                       | 0.58%         | <b>1.24%</b>  | 0.45%                  | 0.23%     | 0.00%         | 0.00%        | 0.54%      |
| Using personal watercraft                         | <b>0.76%</b>  | 0.00%         | 0.59%                  | 0.30%     | 0.00%         | 0.52%        | 0.69%      |
| Motor boating/Cruising                            | <b>1.07%</b>  | 0.57%         | 0.79%                  | 0.40%     | 0.00%         | 0.33%        | 0.96%      |
| Yacht cruising                                    | 0.82%         | 0.51%         | <b>0.89%</b>           | 0.11%     | 0.84%         | 0.66%        | 0.78%      |
| Power boating                                     | 1.21%         | <b>3.04%</b>  | 1.13%                  | 1.00%     | 0.00%         | 0.00%        | 1.16%      |
| Small sail boat racing                            | 0.33%         | <b>1.04%</b>  | 0.15%                  | 0.00%     | 0.00%         | 0.00%        | 0.30%      |
| Canal boating                                     | <b>0.75%</b>  | 0.41%         | 0.12%                  | 0.45%     | 0.00%         | 0.00%        | 0.65%      |
| Yacht racing                                      | 0.21%         | <b>0.51%</b>  | 0.38%                  | 0.00%     | 0.00%         | 0.00%        | 0.20%      |
| Surfboarding                                      | <b>1.50%</b>  | 1.27%         | 0.90%                  | 0.19%     | 0.00%         | 0.00%        | 1.32%      |
| Kitesurfing                                       | 0.12%         | 0.00%         | 0.00%                  | 0.00%     | 0.00%         | <b>1.05%</b> | 0.11%      |
| Angling (from a boat)                             | 1.08%         | <b>2.64%</b>  | 0.36%                  | 0.15%     | 0.00%         | 0.33%        | 0.97%      |
| Angling (from the shore)                          | 1.92%         | <b>2.02%</b>  | 1.90%                  | 0.13%     | 0.18%         | 0.50%        | 1.74%      |
| Cliff climbing                                    | <b>0.86%</b>  | 0.53%         | 0.79%                  | 0.62%     | 0.00%         | 0.54%        | 0.80%      |
| Coastal walking                                   | 11.04%        | <b>11.52%</b> | 8.42%                  | 2.43%     | 1.80%         | 5.21%        | 10.03%     |
| Outdoor swimming                                  | 10.56%        | 9.99%         | <b>12.33%</b>          | 5.41%     | 5.66%         | 9.31%        | 10.19%     |
| Leisure sub-aqua diving (from the shore and boat) | <b>1.01%</b>  | 0.94%         | 0.84%                  | 0.00%     | 0.18%         | 0.47%        | 0.91%      |
| Spending general leisure time at the beach        | 12.84%        | <b>17.18%</b> | 10.49%                 | 3.00%     | 2.06%         | 10.22%       | 11.85%     |
| None                                              | 72.06%        | 68.84%        | 71.73%                 | 89.18%    | <b>93.34%</b> | 78.36%       | 73.72%     |
| UK adult population                               | 40,217,166    | 839,871       | 2,876,011              | 2,652,718 | 1,606,507     | 858,727      | 49,051,000 |
| Unweighted Base                                   | 10,486        | 228           | 737                    | 629       | 402           | 201          | 12,683     |

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

The much greater numbers of White British residents mean that this group dominates all activities in terms of the profile participating in each activity.

Table 13 Participation by Ethnicity (participants)

|                                                   | White British     | White Irish | Other White background | Asian     | Black     | Mixed/ Other | Total      |
|---------------------------------------------------|-------------------|-------------|------------------------|-----------|-----------|--------------|------------|
| Any Activity                                      | <b>11,237,905</b> | 261,708     | 813,111                | 287,146   | 106,914   | 185,814      | 12,892,598 |
| Any boating activity                              | <b>3,119,290</b>  | 77,113      | 203,230                | 72,357    | 21,475    | 40,895       | 3,534,359  |
| Any sailboat activities/yacht cruising            | <b>767,075</b>    | 15,451      | 49,135                 | 7,899     | 17,398    | 12,795       | 869,754    |
| Any sailboat racing/yacht racing                  | <b>193,908</b>    | 8,748       | 15,411                 | -         | -         | -            | 218,067    |
| Motor boating / cruising or canal boating         | <b>723,824</b>    | 8,222       | 26,105                 | 22,674    | -         | 2,868        | 783,693    |
| Canoeing                                          | <b>134,361</b>    | 8,748       | 4,457                  | -         | -         | -            | 147,566    |
| Water skiing                                      | <b>500,328</b>    | 11,172      | 27,879                 | 5,030     | 3,938     | 7,087        | 555,432    |
| Small sail boat activities                        | <b>83,816</b>     | 4,279       | 10,954                 | -         | -         | -            | 99,049     |
| Rowing/Sculling                                   | <b>331,583</b>    | 4,279       | 25,714                 | 2,869     | 13,460    | 5,709        | 383,615    |
| Windsurfing                                       | <b>485,548</b>    | 25,503      | 32,415                 | 26,414    | -         | -            | 569,881    |
| Using personal watercraft                         | <b>431,074</b>    | 4,786       | 22,792                 | 10,714    | -         | 2,868        | 472,233    |
| Motor boating/Cruising                            | <b>301,504</b>    | 3,436       | 3,313                  | 11,960    | -         | -            | 320,213    |
| Yacht cruising                                    | <b>1,151,023</b>  | 32,178      | 56,466                 | 7,496     | 4,077     | 11,239       | 1,262,478  |
| Power boating                                     | <b>287,786</b>    | 9,201       | 28,047                 | 9,303     | 4,077     | 11,173       | 349,587    |
| Small sail boat racing                            | <b>234,616</b>    | 10,402      | 12,840                 | 6,124     | -         | -            | 263,982    |
| Canal boating                                     | <b>248,414</b>    | 7,871       | 29,160                 | 16,067    | 3,938     | 9,783        | 315,233    |
| Yacht racing                                      | <b>307,114</b>    | -           | 17,042                 | 7,861     | -         | 4,455        | 336,472    |
| Surfboarding                                      | <b>604,230</b>    | 10,707      | 25,860                 | 5,030     | -         | -            | 645,827    |
| Kitesurfing                                       | <b>47,347</b>     | -           | -                      | -         | -         | 9,050        | 56,397     |
| Angling (from a boat)                             | <b>434,790</b>    | 22,148      | 10,272                 | 4,032     | -         | 2,868        | 474,110    |
| Angling (from the shore)                          | <b>773,707</b>    | 16,968      | 54,687                 | 3,340     | 2,967     | 4,265        | 855,934    |
| Cliff climbing                                    | <b>345,816</b>    | 4,469       | 22,661                 | 16,328    | -         | 4,624        | 393,897    |
| Coastal walking                                   | <b>4,440,489</b>  | 96,752      | 242,170                | 64,492    | 28,894    | 44,734       | 4,917,530  |
| Outdoor swimming                                  | <b>5,165,763</b>  | 144,292     | 301,680                | 79,703    | 33,093    | 87,748       | 5,812,279  |
| Leisure sub-aqua diving (from the shore and boat) | <b>4,245,954</b>  | 83,943      | 354,510                | 143,383   | 90,998    | 79,986       | 4,998,774  |
| Spending general leisure time at the beach        | <b>405,898</b>    | 7,879       | 24,175                 | -         | 2,869     | 4,047        | 444,868    |
| None                                              | <b>28,979,261</b> | 578,163     | 2,062,900              | 2,365,571 | 1,499,593 | 672,913      | 36,158,402 |
| UK adult population                               | 40,217,166        | 839,871     | 2,876,011              | 2,652,718 | 1,606,507 | 858,727      | 49,051,000 |
| Unweighted Base                                   | 10,486            | 228         | 737                    | 629       | 402       | 201          | 12,683     |

Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents - 12,683 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 have been constructed from the information available and are defined as below.

### Figure 9 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 |

Overall couples under the age of 55 remain the most active group, 33.9% participating in at least one activity in 2009.

As in previous years, families record the highest participation for 'spending general leisure time at the beach', followed by couples under 55 and empty nesters. Single parents, who were the second most likely group to have spent some time on the beach in 2007, fell to fourth in 2008 and have now dropped to fifth place because of greater growth among other groups.

For the more active activities like canoeing, kitesurfing, windsurfing and cliff climbing, the highest participation rates remain among those living as 'students/workers in a house-share'. However, in

2009 a higher proportion of 'couples under the age of 55' take part in surfboarding. Canal boating is most popular among 'Empty Nesters'. We have highlighted the highest participation rate and the largest absolute participation number in blue in tables 14 and 15.

Table 14 Participation by Life Stage (percentages)

|                                                   | Life stage                     |              |                    |               |                   |                  |               | Total UK   |
|---------------------------------------------------|--------------------------------|--------------|--------------------|---------------|-------------------|------------------|---------------|------------|
|                                                   | Student/Workers<br>house share | Single       | Couple under<br>55 | Family        | Single<br>parents | Empty<br>nesters | Greys         |            |
| Any Activity                                      | 30.7%                          | 22.74%       | <b>33.92%</b>      | 32.03%        | 23.29%            | 26.57%           | 13.21%        | 26.28%     |
| Any boating activity                              | <b>12.4%</b>                   | 6.64%        | 10.68%             | 7.79%         | 7.65%             | 6.13%            | 1.73%         | 7.21%      |
| Any sailboat activities/yacht cruising            | 2.1%                           | 2.10%        | 2.41%              | 1.87%         | 1.53%             | <b>2.49%</b>     | 0.73%         | 1.77%      |
| Any sailboat racing/yacht racing                  | 0.5%                           | 0.58%        | <b>0.68%</b>       | 0.44%         | 0.68%             | 0.49%            | 0.09%         | 0.44%      |
| Motor boating / cruising or canal boating         | 1.3%                           | 1.54%        | <b>2.66%</b>       | 1.59%         | 1.75%             | 2.61%            | 0.78%         | 1.60%      |
| Canoeing                                          | <b>6.33%</b>                   | 1.84%        | 3.89%              | 2.72%         | 2.71%             | 1.45%            | 0.08%         | 2.57%      |
| Water skiing                                      | <b>1.75%</b>                   | 0.46%        | 0.59%              | 0.75%         | 0.89%             | 0.00%            | 0.06%         | 0.64%      |
| Small sail boat activities                        | 1.07%                          | 1.23%        | <b>1.76%</b>       | 1.34%         | 0.91%             | 1.53%            | 0.37%         | 1.13%      |
| Rowing/Sculling                                   | <b>2.09%</b>                   | 0.57%        | 0.75%              | 0.55%         | 1.05%             | 0.42%            | 0.14%         | 0.71%      |
| Windsurfing                                       | <b>1.71%</b>                   | 0.62%        | 0.76%              | 0.53%         | 0.18%             | 0.00%            | 0.06%         | 0.54%      |
| Using personal watercraft                         | <b>1.79%</b>                   | 0.63%        | 1.03%              | 0.58%         | 1.18%             | 0.09%            | 0.03%         | 0.69%      |
| Motor boating/Cruising                            | 0.76%                          | 1.12%        | <b>1.75%</b>       | 0.98%         | 0.67%             | 1.41%            | 0.51%         | 0.96%      |
| Yacht cruising                                    | 1.18%                          | <b>1.26%</b> | 1.05%              | 0.55%         | 0.62%             | 1.21%            | 0.41%         | 0.78%      |
| Power boating                                     | 1.58%                          | 1.38%        | <b>2.04%</b>       | 1.64%         | 0.71%             | 0.42%            | 0.07%         | 1.16%      |
| Small sail boat racing                            | 0.27%                          | 0.27%        | 0.58%              | 0.27%         | <b>0.68%</b>      | 0.29%            | 0.05%         | 0.30%      |
| Canal boating                                     | 0.49%                          | 0.42%        | 0.91%              | 0.62%         | 1.08%             | <b>1.37%</b>     | 0.27%         | 0.65%      |
| Yacht racing                                      | 0.35%                          | <b>0.58%</b> | 0.10%              | 0.17%         | 0.00%             | 0.32%            | 0.06%         | 0.20%      |
| Surfboarding                                      | 2.72%                          | 0.82%        | <b>3.20%</b>       | 1.49%         | 1.07%             | 0.10%            | 0.05%         | 1.32%      |
| Kitesurfing                                       | <b>0.36%</b>                   | 0.23%        | 0.11%              | 0.03%         | 0.30%             | 0.00%            | 0.00%         | 0.11%      |
| Angling (from a boat)                             | 1.31%                          | <b>1.52%</b> | 1.42%              | 1.02%         | 0.41%             | 1.24%            | 0.29%         | 0.97%      |
| Angling (from the shore)                          | 1.55%                          | 1.70%        | <b>2.60%</b>       | 2.22%         | 1.54%             | 1.95%            | 0.67%         | 1.74%      |
| Cliff climbing                                    | <b>1.79%</b>                   | 1.10%        | 1.44%              | 0.73%         | 1.00%             | 0.13%            | 0.00%         | 0.80%      |
| Coastal walking                                   | 8.11%                          | 10.39%       | <b>14.47%</b>      | 11.90%        | 5.60%             | 14.09%           | 5.95%         | 10.03%     |
| Outdoor swimming                                  | 14.00%                         | 7.73%        | <b>14.51%</b>      | 13.16%        | 11.60%            | 6.65%            | 2.80%         | 10.19%     |
| Leisure sub-aqua diving (from the shore and boat) | 1.23%                          | 1.34%        | <b>2.28%</b>       | 0.91%         | 0.54%             | 0.43%            | 0.11%         | 0.91%      |
| Spending general leisure time at the beach        | 11.28%                         | 9.45%        | 13.66%             | <b>16.09%</b> | 10.07%            | 11.38%           | 6.63%         | 11.85%     |
| None                                              | 69.29%                         | 77.26%       | 66.08%             | 67.97%        | 76.71%            | 73.43%           | <b>86.79%</b> | 73.72%     |
| UK adult population                               | 5,856,016                      | 4,891,581    | 5,052,755          | 15,322,476    | 4,488,123         | 4,033,627        | 9,406,422     | 49,051,000 |
| Unweighted Base                                   | 1,315                          | 1,196        | 1,139              | 3,561         | 1,133             | 1,007            | 3,332         | 12,683     |

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

When the size of each life stage group is taken into account the importance of families becomes very apparent, with 38% of participants in 'all activities' belonging to this group and 34% of participants for the 12 'any boating activities'.

Table 15 Participation by Life Stage (participants)

|                                                   | Life stage                     |               |                    |                   |                   |                  |           | Total UK   |
|---------------------------------------------------|--------------------------------|---------------|--------------------|-------------------|-------------------|------------------|-----------|------------|
|                                                   | Student/Workers<br>house share | Single        | Couple under<br>55 | Family            | Single<br>parents | Empty<br>nesters | Greys     |            |
| Any Activity                                      | 1,798,522                      | 1,112,492     | 1,713,812          | <b>4,907,836</b>  | 1,045,329         | 1,071,878        | 1,242,730 | 12,892,598 |
| Any boating activity                              | 724,221                        | 324,681       | 539,529            | <b>1,192,897</b>  | 343,255           | 247,411          | 162,365   | 3,534,359  |
| Any sailboat activities/yacht cruising            | 121,357                        | 102,513       | 121,808            | <b>285,858</b>    | 68,883            | 100,506          | 68,829    | 869,754    |
| Any sailboat racing/yacht racing                  | 28,799                         | 28,279        | 34,319             | <b>68,016</b>     | 30,376            | 19,872           | 8,405     | 218,067    |
| Motor boating / cruising or canal boating         | 73,549                         | 75,281        | 134,484            | <b>242,942</b>    | 78,607            | 105,432          | 73,396    | 783,693    |
| Canoeing                                          | 370,692                        | 90,134        | 196,394            | <b>417,435</b>    | 121,622           | 58,417           | 7,784     | 1,262,478  |
| Water skiing                                      | 102,234                        | 22,690        | 29,765             | <b>115,434</b>    | 39,924            | -                | 5,185     | 315,233    |
| Small sail boat activities                        | 62,599                         | 60,069        | 89,179             | <b>205,916</b>    | 41,034            | 61,804           | 34,831    | 555,432    |
| Rowing/Sculling                                   | <b>122,646</b>                 | 27,891        | 37,667             | 84,074            | 47,097            | 17,131           | 13,081    | 349,587    |
| Windsurfing                                       | <b>99,867</b>                  | 30,494        | 38,610             | 80,963            | 8,203             | -                | 5,845     | 263,982    |
| Using personal watercraft                         | <b>105,035</b>                 | 30,776        | 52,213             | 88,534            | 53,108            | 3,804            | 3,003     | 336,472    |
| Motor boating/Cruising                            | 44,704                         | 54,587        | 88,266             | <b>149,705</b>    | 29,990            | 56,839           | 48,142    | 472,233    |
| Yacht cruising                                    | 69,088                         | 61,861        | 52,890             | <b>84,399</b>     | 27,849            | 48,838           | 38,690    | 383,615    |
| Power boating                                     | 92,559                         | 67,493        | 103,023            | <b>250,817</b>    | 31,977            | 16,993           | 7,020     | 569,881    |
| Small sail boat racing                            | 15,551                         | 13,391        | 29,368             | <b>42,011</b>     | 30,376            | 11,702           | 5,167     | 147,566    |
| Canal boating                                     | 28,845                         | 20,695        | 46,218             | <b>95,271</b>     | 48,617            | 55,314           | 25,254    | 320,213    |
| Yacht racing                                      | 20,710                         | <b>28,279</b> | 4,951              | 26,005            | -                 | 13,012           | 6,091     | 99,049     |
| Surfboarding                                      | 159,207                        | 40,031        | 161,704            | <b>228,114</b>    | 48,015            | 3,969            | 4,788     | 645,827    |
| Kitesurfing                                       | <b>20,930</b>                  | 11,348        | 5,578              | 4,989             | 13,551            | -                | -         | 56,397     |
| Angling (from a boat)                             | 76,767                         | 74,485        | 71,710             | <b>155,569</b>    | 18,452            | 49,966           | 27,161    | 474,110    |
| Angling (from the shore)                          | 90,959                         | 82,916        | 131,615            | <b>339,763</b>    | 69,053            | 78,562           | 63,068    | 855,934    |
| Cliff climbing                                    | 105,082                        | 53,787        | 72,801             | <b>112,079</b>    | 44,855            | 5,293            | -         | 393,897    |
| Coastal walking                                   | 474,855                        | 508,263       | 731,303            | <b>1,823,396</b>  | 251,453           | 568,177          | 560,085   | 4,917,530  |
| Outdoor swimming                                  | 819,870                        | 378,105       | 733,237            | <b>2,015,802</b>  | 520,461           | 268,217          | 263,082   | 4,998,774  |
| Leisure sub-aqua diving (from the shore and boat) | 72,187                         | 65,467        | 115,174            | <b>140,065</b>    | 24,192            | 17,331           | 10,453    | 444,868    |
| Spending general leisure time at the beach        | 660,306                        | 462,031       | 690,382            | <b>2,464,629</b>  | 452,144           | 459,091          | 623,695   | 5,812,279  |
| None                                              | 4,057,495                      | 3,779,089     | 3,338,942          | <b>10,414,640</b> | 3,442,793         | 2,961,750        | 8,163,693 | 36,158,402 |
| UK adult population                               | 5,856,016                      | 4,891,581     | 5,052,755          | 15,322,476        | 4,488,123         | 4,033,627        | 9,406,422 | 49,051,000 |
| Unweighted Base                                   | 1,315                          | 1,196         | 1,139              | 3,561             | 1,133             | 1,007            | 3,332     | 12,683     |

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

## Regional Participation

### Participation by Residence - ITV Regions

Table 16 provides an indication of the variations in participation in 2009 depending on the residential area in which the country respondents live. 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 369 and 4,212. This means the statistics are less reliable than the national estimates.

We have highlighted participation rates where changes are statistically significant compared with 2008. 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 10 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                                                                               |

In 2009, not surprisingly, there are more significant increases in regional participation rates than there were in 2008. Participation rates for 'any activity' have increased significantly for those living across all regions bar Wales/West/South West and Northern Ireland.

'Any boating activity' has seen significant increases in London/East/South East, North West/North East/Yorkshire and Midlands, Northern Ireland shows a drop while the remaining regions show insignificant rises. London/East/South East shows the highest number of significant increases (7 activities), closely followed by North West/North East/Yorkshire (6 increases). The only 2 regions with significant drops are Northern Ireland and Wales/West/South West, both showing significant decreases in 3 activities.

Those living in Wales/West/South West continue to display the highest participation rate for 'any activity' of all mainland regions. Overall 32% of those living in Wales/West or South West participated in at least one activity during 2009. Participation in 'any boating activity' is highest in the London/East/South East region, as are both sailing categories.

Table 16 Participation Rates by Residence –ITV Regions 2009 (percentages)

|                                                   | ITV regions                 |                            |          |                                         |                     |                     |        | All regions |
|---------------------------------------------------|-----------------------------|----------------------------|----------|-----------------------------------------|---------------------|---------------------|--------|-------------|
|                                                   | London/ East/<br>South East | Wales/ West/<br>South West | Midlands | North West/<br>North East/<br>Yorkshire | Border/<br>Scotland | Northern<br>Ireland |        |             |
| Any Activity                                      | 29.30%                      | 32.06%                     | 20.95%   | 23.92%                                  | 19.94%              | 41.66%              | 26.28% |             |
| Any boating activity                              | 8.93%                       | 7.74%                      | 5.46%    | 6.20%                                   | 5.82%               | 8.37%               | 7.21%  |             |
| Any sailboat activities/yacht cruising            | 2.63%                       | 2.20%                      | 1.05%    | 1.18%                                   | 1.30%               | 1.34%               | 1.77%  |             |
| Any sailboat racing/yacht racing                  | 0.66%                       | 0.58%                      | 0.23%    | 0.29%                                   | 0.28%               | 0.53%               | 0.44%  |             |
| Motor boating / cruising or canal boating         | 1.79%                       | 2.02%                      | 1.37%    | 1.51%                                   | 1.12%               | 1.39%               | 1.60%  |             |
| Canoeing                                          | 3.02%                       | 2.77%                      | 1.82%    | 2.42%                                   | 2.43%               | 2.50%               | 2.57%  |             |
| Water skiing                                      | 1.07%                       | 0.39%                      | 0.67%    | 0.38%                                   | 0.17%               | 0.32%               | 0.64%  |             |
| Small sail boat activities                        | 1.44%                       | 1.70%                      | 0.75%    | 0.87%                                   | 0.99%               | 0.62%               | 1.13%  |             |
| Rowing/Sculling                                   | 1.02%                       | 0.63%                      | 0.59%    | 0.67%                                   | 0.11%               | 0.32%               | 0.71%  |             |
| Windsurfing                                       | 0.78%                       | 0.27%                      | 0.44%    | 0.40%                                   | 0.69%               | 0.00%               | 0.54%  |             |
| Using personal watercraft                         | 0.71%                       | 0.83%                      | 0.57%    | 0.59%                                   | 0.68%               | 1.51%               | 0.69%  |             |
| Motor boating/Cruising                            | 1.22%                       | 1.32%                      | 0.42%    | 0.76%                                   | 0.98%               | 1.39%               | 0.96%  |             |
| Yacht cruising                                    | 1.32%                       | 0.63%                      | 0.34%    | 0.50%                                   | 0.57%               | 0.72%               | 0.78%  |             |
| Power boating                                     | 1.38%                       | 1.32%                      | 0.55%    | 1.06%                                   | 1.01%               | 2.67%               | 1.16%  |             |
| Small sail boat racing                            | 0.39%                       | 0.35%                      | 0.16%    | 0.25%                                   | 0.28%               | 0.32%               | 0.30%  |             |
| Canal boating                                     | 0.57%                       | 0.70%                      | 0.95%    | 0.81%                                   | 0.13%               | 0.00%               | 0.65%  |             |
| Yacht racing                                      | 0.30%                       | 0.39%                      | 0.11%    | 0.09%                                   | 0.14%               | 0.21%               | 0.20%  |             |
| Surfboarding                                      | 1.32%                       | 2.88%                      | 1.02%    | 1.09%                                   | 1.20%               | 0.00%               | 1.32%  |             |
| Kitesurfing                                       | 0.13%                       | 0.05%                      | 0.11%    | 0.17%                                   | 0.00%               | 0.00%               | 0.11%  |             |
| Angling (from a boat)                             | 0.91%                       | 1.72%                      | 0.43%    | 0.73%                                   | 1.67%               | 2.07%               | 0.97%  |             |
| Angling (from the shore)                          | 1.58%                       | 1.60%                      | 1.81%    | 1.61%                                   | 2.21%               | 3.75%               | 1.74%  |             |
| Cliff climbing                                    | 0.53%                       | 0.62%                      | 1.01%    | 1.09%                                   | 0.76%               | 0.85%               | 0.80%  |             |
| Coastal walking                                   | 9.63%                       | 14.53%                     | 7.99%    | 10.26%                                  | 7.11%               | 16.37%              | 10.03% |             |
| Outdoor swimming                                  | 13.88%                      | 10.86%                     | 8.89%    | 7.61%                                   | 5.93%               | 9.97%               | 10.19% |             |
| Leisure sub-aqua diving (from the shore and boat) | 1.07%                       | 1.06%                      | 0.93%    | 0.84%                                   | 0.39%               | 0.66%               | 0.91%  |             |
| Spending general leisure time at the beach        | 12.56%                      | 17.06%                     | 8.64%    | 10.42%                                  | 8.66%               | 26.45%              | 11.85% |             |
| None                                              | 70.70%                      | 67.94%                     | 79.05%   | 76.08%                                  | 80.06%              | 58.34%              | 73.72% |             |
| Base                                              | 4,212                       | 1,320                      | 1,942    | 3,694                                   | 1,146               | 369                 | 12,683 |             |

Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents - 12,683 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 17. London/ East/ South East as a region shows the greatest number of participants for the majority of activities reflecting its larger regional population. The activities that are an exception to this canal boating, kitesurfing and cliff climbing, which have higher numbers of participants living in the North West/North East/Yorkshire region.

Table 17 Participation Rates by Residence –ITV Regions 2009 (participants)

|                                                   | ITV regions                 |                            |           |                                         |                     |                     |            | All regions |
|---------------------------------------------------|-----------------------------|----------------------------|-----------|-----------------------------------------|---------------------|---------------------|------------|-------------|
|                                                   | London/ East/<br>South East | Wales/ West/<br>South West | Midlands  | North West/<br>North East/<br>Yorkshire | Border/<br>Scotland | Northern<br>Ireland |            |             |
| Any Activity                                      | 4,924,282                   | 1,569,703                  | 1,531,253 | 3,407,780                               | 876,180             | 583,401             | 12,892,598 |             |
| Any boating activity                              | 1,500,274                   | 378,772                    | 399,365   | 882,997                                 | 255,728             | 117,223             | 3,534,359  |             |
| Any sailboat activities/yacht cruising            | 441,127                     | 107,597                    | 76,564    | 168,636                                 | 57,047              | 18,784              | 869,754    |             |
| Any sailboat racing/yacht racing                  | 111,604                     | 28,294                     | 16,727    | 41,557                                  | 12,486              | 7,399               | 218,067    |             |
| Motor boating / cruising or canal boating         | 301,368                     | 99,026                     | 99,831    | 214,918                                 | 49,015              | 19,535              | 783,693    |             |
| Canoeing                                          | 506,725                     | 135,658                    | 132,804   | 345,364                                 | 106,897             | 35,029              | 1,262,478  |             |
| Water skiing                                      | 180,170                     | 19,327                     | 49,293    | 54,468                                  | 7,539               | 4,435               | 315,233    |             |
| Small sail boat activities                        | 241,518                     | 83,414                     | 54,714    | 123,588                                 | 43,522              | 8,675               | 555,432    |             |
| Rowing/Sculling                                   | 170,614                     | 30,877                     | 43,457    | 95,247                                  | 4,917               | 4,475               | 349,587    |             |
| Windsurfing                                       | 130,590                     | 13,185                     | 32,303    | 57,586                                  | 30,319              | -                   | 263,982    |             |
| Using personal watercraft                         | 119,097                     | 40,447                     | 41,464    | 84,412                                  | 29,930              | 21,122              | 336,472    |             |
| Motor boating/Cruising                            | 205,468                     | 64,699                     | 30,519    | 108,759                                 | 43,254              | 19,535              | 472,233    |             |
| Yacht cruising                                    | 221,359                     | 30,865                     | 24,703    | 71,519                                  | 25,060              | 10,109              | 383,615    |             |
| Power boating                                     | 232,195                     | 64,611                     | 40,046    | 151,300                                 | 44,408              | 37,320              | 569,881    |             |
| Small sail boat racing                            | 66,162                      | 16,950                     | 11,776    | 35,718                                  | 12,486              | 4,475               | 147,566    |             |
| Canal boating                                     | 95,900                      | 34,327                     | 69,312    | 114,913                                 | 5,761               | -                   | 320,213    |             |
| Yacht racing                                      | 49,721                      | 19,055                     | 7,804     | 13,301                                  | 6,243               | 2,924               | 99,049     |             |
| Surfboarding                                      | 222,494                     | 141,100                    | 74,193    | 155,172                                 | 52,869              | -                   | 645,827    |             |
| Kitesurfing                                       | 21,167                      | 2,597                      | 8,389     | 24,244                                  | -                   | -                   | 56,397     |             |
| Angling (from a boat)                             | 152,953                     | 83,986                     | 31,448    | 103,482                                 | 73,324              | 28,918              | 474,110    |             |
| Angling (from the shore)                          | 265,877                     | 78,333                     | 132,495   | 229,685                                 | 97,020              | 52,524              | 855,934    |             |
| Cliff climbing                                    | 89,266                      | 30,493                     | 74,145    | 154,588                                 | 33,552              | 11,853              | 393,897    |             |
| Outdoor swimming                                  | 2,332,566                   | 531,549                    | 650,015   | 1,084,424                               | 260,583             | 139,636             | 4,998,774  |             |
| Leisure sub-aqua diving (from the shore and boat) | 179,228                     | 52,036                     | 67,844    | 119,283                                 | 17,282              | 9,196               | 444,868    |             |
| Spending general leisure time at the beach        | 2,110,632                   | 835,290                    | 631,242   | 1,484,082                               | 380,699             | 370,334             | 5,812,279  |             |
| None                                              | 11,880,274                  | 3,326,643                  | 5,777,639 | 10,838,913                              | 3,517,992           | 816,941             | 36,158,402 |             |
| Base                                              | 4,212                       | 1,320                      | 1,942     | 3,694                                   | 1,146               | 369                 | 12,683     |             |

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



In Table 18 we have combined the 2007 to 2009 samples to provide an aggregate estimate of participation rate over the last three years.

Table 18 Watersports Participation by Residence - ITV Regions– Average 2007-2009

| Average 2007-2009                                 | ITV region                  |                            |          |                                         |                     |                     |        | All regions |
|---------------------------------------------------|-----------------------------|----------------------------|----------|-----------------------------------------|---------------------|---------------------|--------|-------------|
|                                                   | London/ East/<br>South East | Wales/ West/<br>South West | Midlands | North West/<br>North East/<br>Yorkshire | Border/<br>Scotland | Northern<br>Ireland |        |             |
| Any Activity                                      | 28.45%                      | 35.93%                     | 22.03%   | 23.64%                                  | 16.69%              | 44.37%              | 26.31% |             |
| Any boating activity                              | 8.33%                       | 7.90%                      | 6.12%    | 6.25%                                   | 4.80%               | 9.60%               | 7.08%  |             |
| Any sailboat activities/yacht cruising            | 2.41%                       | 1.84%                      | 1.37%    | 1.29%                                   | 1.32%               | 1.87%               | 1.76%  |             |
| Any sailboat racing/yacht racing                  | 0.75%                       | 0.51%                      | 0.28%    | 0.40%                                   | 0.19%               | 0.82%               | 0.51%  |             |
| Motor boating / cruising or canal boating         | 2.16%                       | 2.00%                      | 1.94%    | 1.55%                                   | 1.04%               | 2.93%               | 1.84%  |             |
| Canoeing                                          | 2.28%                       | 2.77%                      | 1.90%    | 2.33%                                   | 1.59%               | 2.42%               | 2.24%  |             |
| Water skiing                                      | 0.94%                       | 0.46%                      | 0.79%    | 0.52%                                   | 0.16%               | 1.03%               | 0.68%  |             |
| Small sail boat activities                        | 1.30%                       | 1.21%                      | 1.00%    | 0.83%                                   | 0.90%               | 0.76%               | 1.05%  |             |
| Rowing/Sculling                                   | 0.85%                       | 0.55%                      | 0.51%    | 0.51%                                   | 0.14%               | 0.39%               | 0.59%  |             |
| Windsurfing                                       | 0.64%                       | 0.34%                      | 0.38%    | 0.35%                                   | 0.44%               | 0.23%               | 0.46%  |             |
| Using personal watercraft                         | 0.64%                       | 0.86%                      | 0.63%    | 0.53%                                   | 0.50%               | 1.64%               | 0.64%  |             |
| Motor boating/Cruising                            | 1.47%                       | 1.29%                      | 0.87%    | 0.86%                                   | 0.84%               | 2.55%               | 1.16%  |             |
| Yacht cruising                                    | 1.29%                       | 0.70%                      | 0.43%    | 0.54%                                   | 0.55%               | 1.11%               | 0.82%  |             |
| Power boating                                     | 0.95%                       | 1.01%                      | 0.46%    | 0.73%                                   | 0.70%               | 1.62%               | 0.82%  |             |
| Small sail boat racing                            | 0.50%                       | 0.24%                      | 0.24%    | 0.31%                                   | 0.19%               | 0.24%               | 0.34%  |             |
| Canal boating                                     | 0.72%                       | 0.74%                      | 1.19%    | 0.73%                                   | 0.20%               | 0.64%               | 0.73%  |             |
| Yacht racing                                      | 0.36%                       | 0.36%                      | 0.11%    | 0.14%                                   | 0.06%               | 0.58%               | 0.24%  |             |
| Surfboarding                                      | 1.21%                       | 3.05%                      | 1.19%    | 0.78%                                   | 0.64%               | 0.83%               | 1.20%  |             |
| Kitesurfing                                       | 0.20%                       | 0.13%                      | 0.07%    | 0.15%                                   | 0.04%               | 0.13%               | 0.14%  |             |
| Angling (from a boat)                             | 0.76%                       | 2.01%                      | 0.77%    | 0.81%                                   | 1.30%               | 2.63%               | 1.01%  |             |
| Angling (from the shore)                          | 1.75%                       | 2.97%                      | 1.89%    | 1.87%                                   | 2.00%               | 4.65%               | 2.04%  |             |
| Cliff climbing                                    | 0.68%                       | 1.12%                      | 0.99%    | 0.84%                                   | 0.75%               | 1.53%               | 0.85%  |             |
| Coastal walking                                   | 11.32%                      | 18.91%                     | 9.23%    | 9.98%                                   | 6.48%               | 21.15%              | 11.26% |             |
| Outdoor swimming                                  | 12.50%                      | 12.49%                     | 9.45%    | 8.09%                                   | 4.82%               | 10.90%              | 10.02% |             |
| Leisure sub-aqua diving (from the shore and boat) | 1.00%                       | 1.11%                      | 0.66%    | 0.75%                                   | 0.55%               | 0.53%               | 0.84%  |             |
| Spending general leisure time at the beach        | 11.54%                      | 17.16%                     | 9.37%    | 10.26%                                  | 6.21%               | 24.06%              | 11.32% |             |
| Base                                              | 16,541                      | 5,280                      | 6,663    | 15,419                                  | 4,580               | 1,470               | 49,953 |             |

Source: Watersports and Leisure Omnibus Surveys 2007 - 2009 (Base: all respondents – 49,953 adults aged 16+)

## Participation by Residence - Postal Area

The following tables show participation rates in the various activities for respondents living in different postal areas. The regions are made of the following postal areas:

Table 19 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                                                                          |

The sample sizes in some of the regions are still relatively small varying between 369 and 1,930. This means the statistics are less reliable than the national estimates. The region with the largest participation rate (Table 20) and the largest absolute participant number (Table 21) in each activity is highlighted in blue. The tables show that respondents living in the southern regions are more likely than those living elsewhere to take part in 'any boating activity', 'any sailing/yacht cruising activity' and 'any sailboat/yacht racing activity'. Participation rates for 'any motor boating/cruising or canal boating activity' are highest in the East. In 2008 the highest participation rate for this boating category was also recorded in the southern regions. Respondents from Northern Ireland are more likely to have participated in 'any activity', as was the case in 2008. Maybe not surprisingly, coastal walking is most popular in the South West, given the existence of many accessible coastal paths in this region.

Table 20 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 of England | Scotland     | Wales | Ireland      |        |          |
| Any Activity                               | 41.3%         | 32.4%       | 24.2%  | 36.6%        | 18.7%      | 24.1%       | 29.9%       | 20.2%         | 20.5%         | 26.1%           | 17.6%        | 18.7% | <b>41.7%</b> | 26.3%  |          |
| Any boating activity                       | <b>13.0%</b>  | 9.5%        | 7.6%   | 9.1%         | 6.1%       | 5.6%        | 7.8%        | 5.6%          | 5.5%          | 6.7%            | 5.1%         | 4.4%  | 8.4%         | 7.2%   |          |
| Any sailboat activities/yacht cruising     | <b>4.0%</b>   | 2.9%        | 2.2%   | 2.7%         | 1.0%       | 1.6%        | 1.1%        | 1.0%          | 0.7%          | 2.0%            | 1.0%         | 1.0%  | 1.3%         | 1.8%   |          |
| Any sailboat racing/yacht racing           | <b>1.7%</b>   | 0.7%        | 0.5%   | 0.4%         | 0.0%       | 0.5%        | 0.4%        | 0.4%          | 0.0%          | 0.2%            | 0.1%         | 0.5%  | 0.5%         | 0.4%   |          |
| Motor boating / cruising or canal boating  | 2.0%          | 1.8%        | 1.5%   | 2.3%         | 1.7%       | 1.2%        | 1.9%        | 1.5%          | 2.1%          | <b>2.4%</b>     | 0.9%         | 0.8%  | 1.4%         | 1.6%   |          |
| Canoeing                                   | <b>5.7%</b>   | 3.6%        | 1.9%   | 3.4%         | 2.7%       | 2.7%        | 2.7%        | 1.9%          | 1.8%          | 1.8%            | 1.7%         | 1.6%  | 2.5%         | 2.6%   |          |
| Water skiing                               | <b>1.8%</b>   | 0.8%        | 1.2%   | 0.4%         | 0.3%       | 0.5%        | 0.3%        | 0.7%          | 0.7%          | 0.3%            | 0.2%         | 0.3%  | 0.3%         | 0.6%   |          |
| Small sail boat activities                 | <b>2.3%</b>   | 1.5%        | 1.1%   | 2.2%         | 1.0%       | 1.0%        | 0.9%        | 0.6%          | 0.7%          | 1.9%            | 0.8%         | 0.6%  | 0.6%         | 1.1%   |          |
| Rowing/Sculling                            | 1.1%          | 1.1%        | 0.9%   | 0.8%         | 0.2%       | 0.3%        | <b>1.5%</b> | 0.8%          | 0.1%          | 1.5%            | 0.0%         | 0.2%  | 0.3%         | 0.7%   |          |
| Windsurfing                                | <b>1.3%</b>   | 0.9%        | 0.8%   | 0.3%         | 0.0%       | 0.6%        | 0.4%        | 0.7%          | 0.3%          | 0.0%            | 0.6%         | 0.0%  | 0.0%         | 0.5%   |          |
| Using personal watercraft                  | <b>1.5%</b>   | 0.7%        | 0.6%   | 0.8%         | 0.2%       | 0.6%        | 0.7%        | 0.5%          | 0.5%          | 0.2%            | 0.7%         | 0.9%  | 1.5%         | 0.7%   |          |
| Motor boating/Cruising                     | 1.5%          | 0.8%        | 1.0%   | 1.4%         | 1.0%       | 0.8%        | 1.0%        | 0.4%          | 0.8%          | <b>2.0%</b>     | 0.8%         | 0.8%  | 1.4%         | 1.0%   |          |
| Yacht cruising                             | <b>2.0%</b>   | 1.5%        | 1.3%   | 0.7%         | 0.0%       | 1.0%        | 0.4%        | 0.5%          | 0.2%          | 0.4%            | 0.2%         | 0.4%  | 0.7%         | 0.8%   |          |
| Power boating                              | 1.3%          | 1.5%        | 1.4%   | 1.3%         | 1.2%       | 0.8%        | 1.5%        | 0.7%          | 0.6%          | 1.2%            | 0.9%         | 0.8%  | <b>2.7%</b>  | 1.2%   |          |
| Small sail boat racing                     | <b>1.0%</b>   | 0.4%        | 0.3%   | 0.3%         | 0.0%       | 0.5%        | 0.2%        | 0.3%          | 0.0%          | 0.0%            | 0.1%         | 0.2%  | 0.3%         | 0.3%   |          |
| Canal boating                              | 0.5%          | 0.9%        | 0.5%   | 0.9%         | 1.0%       | 0.5%        | 0.9%        | 1.1%          | <b>1.2%</b>   | 0.4%            | 0.1%         | 0.0%  | 0.0%         | 0.7%   |          |
| Yacht racing                               | <b>0.6%</b>   | 0.5%        | 0.2%   | 0.3%         | 0.0%       | 0.2%        | 0.1%        | 0.1%          | 0.0%          | 0.2%            | 0.0%         | 0.3%  | 0.2%         | 0.2%   |          |
| Surfboarding                               | 2.4%          | 1.8%        | 1.1%   | <b>2.8%</b>  | 1.6%       | 1.1%        | 1.0%        | 1.1%          | 0.8%          | 0.3%            | 1.0%         | 1.7%  | 0.0%         | 1.3%   |          |
| Kitesurfing                                | 0.2%          | 0.0%        | 0.2%   | 0.1%         | 0.2%       | <b>0.3%</b> | 0.1%        | 0.1%          | 0.2%          | 0.1%            | 0.0%         | 0.0%  | 0.0%         | 0.1%   |          |
| Angling (from a boat)                      | 2.0%          | 0.8%        | 0.4%   | <b>2.3%</b>  | 0.7%       | 0.9%        | 0.9%        | 0.4%          | 0.5%          | 1.2%            | 1.4%         | 0.6%  | 2.1%         | 1.0%   |          |
| Angling (from the shore)                   | <b>3.9%</b>   | 1.4%        | 0.8%   | 1.8%         | 0.2%       | 1.8%        | 2.5%        | 1.9%          | 1.8%          | 1.9%            | 1.9%         | 1.3%  | 3.8%         | 1.7%   |          |
| Cliff climbing                             | 0.4%          | 0.6%        | 0.5%   | 0.4%         | 0.9%       | 0.9%        | <b>1.5%</b> | 1.4%          | 1.3%          | 0.4%            | 0.4%         | 0.5%  | 0.8%         | 0.8%   |          |
| Coastal walking                            | 16.6%         | 9.2%        | 8.0%   | <b>18.2%</b> | 5.5%       | 10.7%       | 14.0%       | 8.7%          | 7.5%          | 5.6%            | 5.5%         | 6.6%  | 16.4%        | 10.0%  |          |
| Outdoor swimming                           | <b>16.8%</b>  | 15.5%       | 13.4%  | 13.0%        | 6.2%       | 7.1%        | 9.5%        | 9.2%          | 8.2%          | 8.0%            | 5.3%         | 4.8%  | 10.0%        | 10.2%  |          |
| Leisure sub-aqua diving (from the shore an | 0.9%          | <b>1.6%</b> | 0.7%   | 1.4%         | 0.7%       | 0.5%        | 1.1%        | 1.2%          | 0.7%          | 1.2%            | 0.4%         | 0.3%  | 0.7%         | 0.9%   |          |
| Spending general leisure time at the beach | 15.8%         | 14.3%       | 10.5%  | 17.8%        | 7.8%       | 10.1%       | 14.5%       | 8.8%          | 7.9%          | 11.0%           | 7.4%         | 10.8% | <b>26.4%</b> | 11.8%  |          |
| None                                       | 58.7%         | 67.6%       | 75.8%  | 63.4%        | 81.3%      | 75.9%       | 70.1%       | 79.8%         | 79.5%         | 73.9%           | <b>82.4%</b> | 81.3% | 58.3%        | 73.7%  |          |
| Base                                       | 568           | 1,292       | 1,930  | 1,081        | 583        | 1,500       | 1,205       | 1,205         | 762           | 463             | 1,099        | 626   | 369          | 12,683 |          |

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

When taking the population of the various regions into account the importance of London becomes more apparent. London records the highest absolute number of participants for 9 of the 21 activities (compared with 10 out of 21 in 2008).

Table 21 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     | Northern Ireland |            |          |
| Any Activity                               | 923,514       | 1,661,036      | <b>1,884,661</b> | 1,470,261      | 429,513    | 1,395,125     | 1,398,617      | 914,535       | 590,507       | 466,157   | 740,733   | 434,538   | 583,401          | 12,892,598 |          |
| Any boating activity                       | 290,980       | 489,086        | <b>592,262</b>   | 366,911        | 139,922    | 325,867       | 363,613        | 253,989       | 158,077       | 120,320   | 213,745   | 102,363   | 117,223          | 3,534,359  |          |
| Any sailboat activities/yacht cruising     | 88,618        | 148,520        | <b>174,765</b>   | 108,931        | 22,016     | 89,782        | 49,532         | 47,233        | 20,351        | 35,866    | 42,283    | 23,074    | 18,784           | 869,754    |          |
| Any sailboat racing/yacht racing           | 36,993        | 35,219         | <b>39,008</b>    | 15,774         | 0          | 26,644        | 17,127         | 17,903        | 0             | 3,238     | 6,243     | 12,520    | 7,399            | 218,067    |          |
| Motor boating / cruising or canal boating  | 44,916        | 90,735         | <b>112,844</b>   | 90,580         | 38,782     | 71,598        | 90,481         | 67,345        | 59,393        | 42,202    | 37,716    | 17,567    | 19,535           | 783,693    |          |
| Canoeing                                   | 128,518       | <b>185,462</b> | 149,943          | 135,817        | 62,589     | 158,270       | 127,744        | 87,549        | 50,647        | 32,842    | 69,971    | 38,098    | 35,029           | 1,262,478  |          |
| Water skiing                               | 40,976        | 38,872         | <b>92,876</b>    | 16,959         | 6,455      | 30,042        | 12,716         | 32,239        | 19,010        | 5,163     | 7,539     | 7,950     | 4,435            | 315,233    |          |
| Small sail boat activities                 | 52,280        | 76,061         | <b>82,657</b>    | <b>89,166</b>  | 22,016     | 57,906        | 41,728         | 25,960        | 20,351        | 33,192    | 31,986    | 13,454    | 8,675            | 555,432    |          |
| Rowing/Sculling                            | 25,177        | 53,908         | 70,842           | 32,130         | 4,042      | 16,204        | <b>71,548</b>  | 35,895        | 3,679         | 27,240    | 0         | 4,448     | 4,475            | 349,587    |          |
| Windsurfing                                | 29,741        | 45,720         | <b>58,448</b>    | 13,185         | 0          | 35,970        | 19,115         | 29,914        | 7,813         | 0         | 24,076    | 0         | 0                | 263,982    |          |
| Using personal watercraft                  | 34,041        | 37,653         | <b>47,799</b>    | 30,358         | 3,918      | 37,277        | 33,544         | 22,732        | 13,013        | 4,418     | 29,930    | 20,669    | 21,122           | 336,472    |          |
| Motor boating/Cruising                     | 33,370        | 42,923         | <b>75,062</b>    | 56,253         | 22,489     | 46,515        | 48,326         | 18,617        | 24,409        | 35,213    | 31,955    | 17,567    | 19,535           | 472,233    |          |
| Yacht cruising                             | 45,033        | 75,312         | <b>100,566</b>   | 26,447         | 0          | 55,199        | 16,972         | 21,273        | 5,517         | 7,271     | 10,297    | 9,620     | 10,109           | 383,615    |          |
| Power boating                              | 28,442        | 77,762         | <b>106,101</b>   | 52,171         | 26,659     | 46,762        | 69,286         | 31,436        | 16,467        | 21,471    | 38,165    | 17,836    | 37,320           | 569,881    |          |
| Small sail boat racing                     | 23,413        | 18,812         | <b>26,790</b>    | 11,259         | 0          | 26,644        | 11,288         | 12,952        | 0             | 0         | 6,243     | 5,691     | 4,475            | 147,566    |          |
| Canal boating                              | 11,546        | 47,811         | 37,783           | 34,327         | 23,012     | 27,116        | 42,154         | <b>48,728</b> | 34,984        | 6,990     | 5,761     | 0         | 0                | 320,213    |          |
| Yacht racing                               | 13,580        | <b>23,539</b>  | 12,218           | 12,226         | 0          | 13,705        | 5,839          | 4,951         | 0             | 3,238     | 0         | 6,829     | 2,924            | 99,049     |          |
| Surfboarding                               | 52,921        | 93,534         | 85,119           | <b>113,668</b> | 37,071     | 61,423        | 45,778         | 48,745        | 22,516        | 4,614     | 41,569    | 38,870    | 0                | 645,827    |          |
| Kitesurfing                                | 4,455         | 0              | 14,319           | 2,597          | 4,840      | <b>16,176</b> | 3,228          | 3,795         | 4,595         | 2,393     | 0         | 0         | 0                | 56,397     |          |
| Angling (from a boat)                      | 44,267        | 39,752         | 34,080           | <b>91,104</b>  | 14,935     | 54,082        | 41,829         | 17,111        | 14,055        | 21,755    | 58,007    | 14,215    | 28,918           | 474,110    |          |
| Angling (from the shore)                   | 87,822        | 70,995         | 65,700           | 70,833         | 5,293      | 105,925       | <b>115,466</b> | 84,718        | 52,705        | 33,564    | 80,857    | 29,531    | 52,524           | 855,934    |          |
| Cliff climbing                             | 9,726         | 30,496         | 40,434           | 17,713         | 21,582     | 54,295        | <b>68,307</b>  | 63,652        | 37,176        | 8,042     | 17,840    | 12,780    | 11,853           | 393,897    |          |
| Coastal walking                            | 371,099       | 473,004        | 621,742          | <b>729,802</b> | 125,970    | 617,688       | 654,892        | 394,294       | 216,153       | 100,673   | 230,375   | 152,537   | 229,302          | 4,917,530  |          |
| Outdoor swimming                           | 375,842       | 795,649        | <b>1,038,427</b> | 520,855        | 143,184    | 408,551       | 444,696        | 418,507       | 235,152       | 142,721   | 224,341   | 111,214   | 139,636          | 4,998,774  |          |
| Leisure sub-aqua diving (from the shore an | 19,130        | <b>81,306</b>  | 56,632           | 57,425         | 15,788     | 30,738        | 52,019         | 56,297        | 20,786        | 21,441    | 17,282    | 6,829     | 9,196            | 444,868    |          |
| Spending general leisure time at the beach | 353,231       | 734,205        | <b>816,445</b>   | 713,986        | 179,556    | 585,522       | 677,080        | 397,210       | 226,584       | 197,200   | 309,264   | 251,661   | 370,334          | 5,812,279  |          |
| None                                       | 1,314,805     | 3,463,589      | <b>5,890,486</b> | 2,549,723      | 1,866,050  | 4,395,951     | 3,275,482      | 3,615,305     | 2,292,579     | 1,321,680 | 3,466,075 | 1,889,736 | 816,941          | 36,158,402 |          |
| Base                                       | 568           | 1,292          | 1,930            | 1,081          | 583        | 1,500         | 1,205          | 1,205         | 762           | 463       | 1,099     | 626       | 369              | 12,683     |          |

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

### 3. Participation History

In 2009 several new questions were added to the watersports and leisure participation survey designed to find out whether those who participated in a boating activity in the past 12 months have done so for the first time, as well as whether those that have not participated in the past 12 months had done so at an earlier time in their life. Respondents who had started to participate within the first 12 months were asked for their reason for starting, while those who had participated at some point in the past but not in the past 12 months were asked why they had stopped participating. A list of reasons was read out and the respondent was able to say which reasons applied in their case.

These questions were asked per category, rather than for individual activities. The categories used were as follows:

| Category                       | Contributing activities                                                                       |
|--------------------------------|-----------------------------------------------------------------------------------------------|
| Sailing activities             | Small sail boat racing, small sail boat activities, yacht racing, yacht cruising, windsurfing |
| Power/Motor boating activities | Power boating, motor boating/cruising, canal boating                                          |
| Other Watersports activities   | Canoeing, rowing, using personal watercraft and water skiing                                  |

#### Last Participation

The majority of those who have not participated in the various categories in the past 12 months have never participated (between 80% for other watersports and over 90% for power/motor boating). This number could include people who fail to include any casual participation (e.g. on holidays, or when invited by somebody else) because they do not count this as 'proper' participation in an activity. Table 22 shows that a significant number of participants ending their participation each year. It appears to be evenly distributed over time scales suggesting a consistent pattern of departures. (The category 'last participation longer than 5 years ago' records a higher proportion of past participants because it covers a lot longer time frame than the other two categories.)

Table 22 Last Time Participated (if not participated this year)

|                     | 13 months to<br>2 years ago | 3-5 years ago | Longer than<br>5 years ago | Never<br>participated | Number of<br>respondents -<br>Weighted | Number of<br>respondents -<br>Unweighted |
|---------------------|-----------------------------|---------------|----------------------------|-----------------------|----------------------------------------|------------------------------------------|
| Sailing             | 1.3%                        | 1.7%          | 8.6%                       | 88.1%                 | 47,880,829                             | 12,418                                   |
| Power/Motor boating | 1.5%                        | 1.9%          | 5.1%                       | 91.4%                 | 47,754,476                             | 12,386                                   |
| Other Watersports   | 3.5%                        | 3.2%          | 12.7%                      | 80.2%                 | 47,091,992                             | 12,261                                   |

Source: Watersports participation survey 2009 (Base: all respondents who have not participated in the respective activity categories in the last 12 months)

#### First Participation

Of those who have participated in the past 12 months, over 40% have participated for the first time during the past 12 months ie they started participating in 2009. It shows the sports are attracting significant numbers trying out their activity each year.

The proportion of respondents who record that the first participated in the past 12 months might appear inflated because casual participants who dip in and out of an activity may only count their latest phase of participation. However, the fact that so few seemed to have started participating 2-5 years ago suggests that most of this annual influx do not continue to participate consistently each year.

Table 23 First Time Participated

|                     | In the past 12 months to |      | 3-5 years ago | Longer than 5 years ago | Don't Know | Number of respondents - Weighted | Number of respondents - Unweighted |
|---------------------|--------------------------|------|---------------|-------------------------|------------|----------------------------------|------------------------------------|
|                     | 13 months to 2 years ago |      |               |                         |            |                                  |                                    |
| Sailing             | 43.1%                    | 5.1% | 6.0%          | 44.7%                   | 1.1%       | 1,170,171                        | 265                                |
| Power/Motor boating | 46.4%                    | 2.1% | 7.8%          | 41.4%                   | 2.2%       | 1,296,524                        | 297                                |
| Other Watersports   | 42.9%                    | 5.9% | 6.0%          | 44.2%                   | 1.0%       | 1,959,008                        | 422                                |

Source: Watersports participation survey 2009 (Base: all respondents who participate in the respective activity categories)

Combining our knowledge of the above with the participation rates of 2008 and 2009 we can estimate a churn rate for each of the boating categories. We estimate churn rates as:

- For sailing, just over 31% stopped in 2009 and 43% have first participated in 2009
- For power/motor boating, 33% stopped in 2009 and 46% have first participated in 2009
- For 'other watersports', we estimate an equal number of people starting in 2009 and stopped in 2009 (42% giving up and 43% starting)

The tracking data contradicts the other sports finding as it records an increase in participation rates for 'Other watersports' from 2008 to 2009. The most likely reason for this is, as mentioned before, that people are casually or intermittently participating are discounting their participation in earlier years.

## Churn Rate

Using the participation rate for 2008 and 2009 and the figure for new entrants into the market this year we can work out the annual churn rate.

Table 24 Annual Churn Rate

|                     | Participation rate |           | First participated in the last 12 months | Dropped out in last 12 months | Net difference in participation 09 vs 08 |
|---------------------|--------------------|-----------|------------------------------------------|-------------------------------|------------------------------------------|
|                     | 2008               | 2009      |                                          |                               |                                          |
| Sailing             | 1,024,833          | 1,170,171 | 504,090                                  | 358,753                       | 145,338                                  |
| Power/Motor boating | 1,003,929          | 1,296,524 | 602,220                                  | 309,625                       | 292,595                                  |
| Other Watersports   | 1,620,291          | 1,959,008 | 840,753                                  | 502,036                       | 338,717                                  |

All categories are showing a net increase in the number of new entrants compared to those dropping out in the past year. The dropout rate is roughly a third of those who participated in the last full year. The new entrants account for over half of the participants in the past year. Power/ motor boating has 60% new participants in the past 12 months. It could be attributed to experience days, which seem to offer more power options than sailing options.

## Reasons for Starting Participation

We have also recorded the reasons people gave for starting and ending their participation. A clue to why so many do not continue after their first year can in part be explained by the reasons they have given for starting to participate. The most often mentioned are circumstantial reasons like 'being on holiday in a hotel offering the activity' or 'family or friends influences'. It is likely that these reasons are more about circumstance than motivation and are therefore less likely to lead to long term participation than reasons like 'I always wanted to try it and finally did'.

Starting to participate because other family members/ friends did so is most commonly cited for sailing activities; twice as often as it is reported for power/ motor and other watersports. On the other hand, participation in sailing activities is less likely to begin because the respondent really

wanted to try it. This bias towards circumstantial rather than motivational reasons for starting suggests participation in sailing activities is likely to be more casual.

Power/motor boating and other watersports activities show similar reasons for starting.

Table 25 to Table 27 show all reasons for starting participating in the boating category in the past 12 months by gender. There are differences in the reasons mentioned by males and females that made them start participating in a sailing activity in the past 12 months. Male reasons are more self referential – ie it is something they want to do, for females they often relate to what family and friends are doing. Males on the other hand are more likely to have wanted to do something new that they haven't tried before, wanted to find a new hobby or were introduced through a club/training centre. Boating events/shows are also only mentioned by males. The results are highlighted in red if they are at least 20% higher than the results for all respondents, and highlighted in blue if they are at least 20% lower.

Table 25 Reasons for Starting to Participate in Sailing by Gender

|                                                                                                              | Male  | Female | All   |
|--------------------------------------------------------------------------------------------------------------|-------|--------|-------|
| Other family members\friends started participating so I started it as well                                   | 18.7% | 25.0%  | 20.8% |
| I participated on holiday as the hotel\resort offered it                                                     | 17.7% | 24.5%  | 20.0% |
| Family member\friend bought a boat\equipment and invited me on it\to use it                                  | 10.8% | 12.6%  | 11.4% |
| I wanted to do something new that I have never tried before                                                  | 12.9% | 2.4%   | 9.4%  |
| I always wanted to try it and finally did                                                                    | 9.9%  | 5.5%   | 8.4%  |
| I started participating as a child and continued when I turned 16                                            | 3.2%  | 12.8%  | 6.5%  |
| I wanted to find a new hobby so I thought I would give it a try                                              | 8.1%  | 1.6%   | 5.9%  |
| Club\training centre introduced me to it                                                                     | 6.5%  | 1.4%   | 4.8%  |
| I have participated in a different boating activity before and wanted to try this one                        | 3.7%  | 3.6%   | 3.7%  |
| I was given a boating experience\training as a gift                                                          | 3.8%  | 2.7%   | 3.4%  |
| My personal circumstances have changed (e.g. retired, children now older) and therefore am able to do it now | 2.7%  | 0.0%   | 1.8%  |
| I read about it in a book\magazine and decided to try it                                                     | 0.0%  | 3.3%   | 1.1%  |
| Went to a boating event\boat show which influenced me                                                        | 1.4%  | 0.0%   | 0.9%  |
| I moved and now have easy access to water                                                                    | 0.0%  | 0.0%   | 0.0%  |
| I have seen a TV programme (e.g. TV series\sports etc) where it was featured and decided to try it           | 0.0%  | 0.0%   | 0.0%  |
| I saw marketing\advertising (e.g. brochures, adverts on TV\radio\press) and decided to give it a try         | 0.0%  | 0.0%   | 0.0%  |
| Other                                                                                                        | 13.2% | 9.3%   | 11.9% |
| Don't Know                                                                                                   | 7.4%  | 4.4%   | 6.4%  |
| Unweighted Base                                                                                              | 74    | 41*    | 115   |

Source: Watersports participation survey 2009 (Base: all respondents who participate in the respective activity categories and have done so for the first time in the last 12 months)

\*Caution: small base size

For power/motor activities participation as part of a holiday is the most important reason, and more so for women than men. Men are more likely to have been started off by other family members or through a boating experience/training gift. There is a large proportion of respondents who apparently don't know why they participated and also 'other reason' not specified. In the next survey we should clarify which other reasons these are.

Table 26 Reasons for Starting to Participate in Power/Motor Boating by Gender

|                                                                                                                            | Male  | Female | All   |
|----------------------------------------------------------------------------------------------------------------------------|-------|--------|-------|
| I participated on holiday as the hotel/resort offered it                                                                   | 20.9% | 29.8%  | 24.7% |
| I always wanted to try it and finally did                                                                                  | 12.2% | 12.6%  | 12.4% |
| Family member/friend bought a boat/equipment and invited me on it\to use it                                                | 10.5% | 13.5%  | 11.8% |
| I wanted to do something new that I have never tried before                                                                | 13.0% | 8.3%   | 11.0% |
| Other family members/friends started participating so I started it as well                                                 | 12.3% | 5.9%   | 9.6%  |
| I was given a boating experience/training as a gift                                                                        | 4.8%  | 1.4%   | 3.4%  |
| I have participated in a different boating activity before and wanted to try this Club/training centre introduced me to it | 3.4%  | 1.7%   | 2.7%  |
| I started participating as a child and continued when I turned 16                                                          | 1.4%  | 3.6%   | 2.3%  |
| My personal circumstances have changed (e.g. retired, children now older) and therefore am able to do it now               | 3.5%  | 0.0%   | 2.0%  |
| I moved and now have easy access to water                                                                                  | 1.3%  | 1.4%   | 1.3%  |
| Went to a boating event\boat show which influenced me                                                                      | 1.8%  | 0.0%   | 1.0%  |
| I wanted to find a new hobby so I thought I would give it a try                                                            | 0.7%  | 1.0%   | 0.8%  |
| I have seen a TV programme (e.g. TV series\sports etc) where it was featured and decided to try it                         | 1.1%  | 0.0%   | 0.6%  |
| I read about it in a book\magazine and decided to try it                                                                   | 0.0%  | 0.0%   | 0.0%  |
| I saw marketing\advertising (e.g. brochures, adverts on TV\radio\press) and decided to give it a try                       | 0.0%  | 0.0%   | 0.0%  |
| Other                                                                                                                      | 7.8%  | 13.9%  | 10.4% |
| Don't Know                                                                                                                 | 9.3%  | 11.8%  | 10.4% |
| Unweighted Base                                                                                                            | 75    | 63     | 138   |

Source: Watersports participation survey 2009 (Base: all respondents who participate in the respective activity categories and have done so for the first time in the last 12 months)

For other watersports participation on holiday is by far the most important reason for having participated for the first time in the past 12 months, almost a third of respondents mentioning it. Males are more likely to have looked for a new hobby and giving it a try.

Table 27 Reasons for Starting to Participate in Other Watersports by Gender

|                                                                                                              | Male  | Female | All   |
|--------------------------------------------------------------------------------------------------------------|-------|--------|-------|
| I participated on holiday as the hotel/resort offered it                                                     | 26.1% | 36.4%  | 30.5% |
| I always wanted to try it and finally did                                                                    | 13.2% | 16.2%  | 14.5% |
| Other family members/friends started participating so I started it as well                                   | 9.7%  | 10.6%  | 10.1% |
| I wanted to find a new hobby so I thought I would give it a try                                              | 12.5% | 5.2%   | 9.3%  |
| I started participating as a child and continued when I turned 16                                            | 6.7%  | 9.2%   | 7.8%  |
| Family member/friend bought a boat/equipment and invited me on it\to use it                                  | 6.5%  | 6.7%   | 6.6%  |
| I wanted to do something new that I have never tried before                                                  | 3.8%  | 5.9%   | 4.7%  |
| Club/training centre introduced me to it                                                                     | 5.0%  | 2.1%   | 3.7%  |
| I have participated in a different boating activity before and wanted to try this one                        | 4.5%  | 0.0%   | 2.6%  |
| My personal circumstances have changed (e.g. retired, children now older) and therefore am able to do it now | 4.4%  | 0.0%   | 2.5%  |
| I was given a boating experience/training as a gift                                                          | 2.7%  | 1.1%   | 2.0%  |
| I moved and now have easy access to water                                                                    | 0.7%  | 1.3%   | 1.0%  |
| Went to a boating event\boat show which influenced me                                                        | 0.0%  | 1.3%   | 0.6%  |
| I have seen a TV programme (e.g. TV series\sports etc) where it was featured and decided to try it           | 0.8%  | 0.0%   | 0.5%  |
| I read about it in a book\magazine and decided to try it                                                     | 0.0%  | 0.0%   | 0.0%  |
| I saw marketing\advertising (e.g. brochures, adverts on TV\radio\press) and decided to give it a try         | 0.0%  | 0.0%   | 0.0%  |
| Other                                                                                                        | 7.9%  | 10.0%  | 8.8%  |
| Don't Know                                                                                                   | 1.7%  | 5.6%   | 3.4%  |
| Unweighted Base                                                                                              | 101   | 83     | 184   |

Source: Watersports participation survey 2009 (Base: all respondents who participate in the respective activity categories and have done so for the first time in the last 12 months)

## Reasons for Stopping Participation

We also asked respondents who said that they had participated at some point in the past but not in the past 12 months were asked why they had stopped participating. Losing interest is in the top three for all activity categories.

As mentioned earlier, it needs to be taken into account that some respondents will discount past activity if they do not consider it as proper participation. Therefore 'holiday' reasons achieve fewer mentions than we might anticipate.

Change of personal circumstances (e.g. having children), is a more important reason to stop participating in sailing for women than it is for men. Women are also more likely to stop when their family member stops probably as they were simply supporting them. This follows from what is seen earlier, that women are more likely to start because somebody else in the family does. Men are more likely to have swapped to a different hobby than women.

Table 28 Reasons Why Stopped Participating in Sailing by Gender

|                                                                                                        | Male  | Female | All   |
|--------------------------------------------------------------------------------------------------------|-------|--------|-------|
| I lost interest in the activity                                                                        | 17.3% | 15.9%  | 16.7% |
| I didn't have time to take part due to work commitments                                                | 13.3% | 9.1%   | 11.5% |
| My personal circumstances have changed (e.g got married\had a child\went to university etc)            | 8.7%  | 13.7%  | 10.7% |
| Only participated as a child at school\summer camp etc                                                 | 9.4%  | 11.9%  | 10.4% |
| I only participate on holiday and we did something different\didn't go last year                       | 6.6%  | 8.2%   | 7.2%  |
| I only participated because other family members\friends were involved and when they stopped, so did I | 5.2%  | 9.9%   | 7.1%  |
| I am trying to save money\cannot afford it                                                             | 7.4%  | 6.2%   | 6.9%  |
| Health reasons meant I couldn't take part                                                              | 6.6%  | 6.6%   | 6.6%  |
| I moved and no longer have easy access to suitable water                                               | 5.9%  | 5.6%   | 5.8%  |
| I have new hobbies\activities which I prefer spending time doing instead                               | 7.3%  | 3.5%   | 5.7%  |
| I am at the time of my life now where it is too physically\mentally challenging                        | 5.9%  | 5.4%   | 5.7%  |
| No interest                                                                                            | 1.9%  | 1.7%   | 1.8%  |
| I had to sell my boat\equipment                                                                        | 2.0%  | 1.5%   | 1.8%  |
| The weather was not good enough in the last 12 months                                                  | 1.2%  | 2.5%   | 1.7%  |
| No opportunity                                                                                         | 0.9%  | 2.0%   | 1.4%  |
| No time (unspecified)                                                                                  | 1.6%  | 0.7%   | 1.2%  |
| No access to a boat                                                                                    | 1.1%  | 1.2%   | 1.1%  |
| I only went once                                                                                       | 1.1%  | 0.9%   | 1.0%  |
| Fear of water / can't swim                                                                             | 0.2%  | 1.6%   | 0.8%  |
| I have swapped to do a different boating category\watersport and stopped                               | 0.7%  | 0.4%   | 0.5%  |
| Left job which involved activity                                                                       | 0.5%  | 0.0%   | 0.3%  |
| My boat\equipment needs replacing and I haven't got round to buying new                                | 0.1%  | 0.3%   | 0.2%  |
| Don't like boats                                                                                       | 0.0%  | 0.1%   | 0.0%  |
| Other                                                                                                  | 0.9%  | 0.9%   | 0.9%  |
| Don't Know                                                                                             | 6.2%  | 5.6%   | 6.0%  |
| Unweighted Base                                                                                        | 753   | 580    | 1,333 |

Source: Watersports participation survey 2009 (Base: all respondents who have not participated in the respective activity categories in the last 12 months but have done so at some point in the past)

Lack of opportunities on holiday are a major reason for Power/motor boating. Trying to save money is also mentioned more often as a reason not to have participated in power/motor boating than the other activity categories. As seen for sailing, women are more likely to stop when the another person in the household stops. They are also more likely to have participated at summer school when they were children. Males cite money reasons more often than females.



Table 29 Reasons Why Stopped Participating in Power/Motor Boating by Gender

|                                                                                                        | Male  | Female | All   |
|--------------------------------------------------------------------------------------------------------|-------|--------|-------|
| I only participate on holiday and we did something different\didn't go last year                       | 17.6% | 18.1%  | 17.8% |
| I lost interest in the activity                                                                        | 14.8% | 15.0%  | 14.9% |
| I am trying to save money\cannot afford it                                                             | 10.6% | 6.3%   | 8.8%  |
| I didn't have time to take part due to work commitments                                                | 10.1% | 6.9%   | 8.8%  |
| My personal circumstances have changed (e.g got married\had a child\went to university etc)            | 8.1%  | 8.8%   | 8.4%  |
| I only participated because other family members\friends were involved and when they stopped, so did I | 6.5%  | 10.8%  | 8.3%  |
| Health reasons meant I couldn't take part                                                              | 5.9%  | 6.0%   | 5.9%  |
| Only participated as a child at school\summer camp etc                                                 | 4.1%  | 6.0%   | 4.9%  |
| I moved and no longer have easy access to suitable water                                               | 5.2%  | 4.3%   | 4.8%  |
| I have new hobbies\activities which I prefer spending time doing instead                               | 4.9%  | 4.7%   | 4.8%  |
| I am at the time of my life now where it is too physically\mentally challenging                        | 3.4%  | 3.5%   | 3.4%  |
| I had to sell my boat\equipment                                                                        | 3.1%  | 1.4%   | 2.4%  |
| No interest                                                                                            | 1.3%  | 2.1%   | 1.7%  |
| The weather was not good enough in the last 12 months                                                  | 1.1%  | 2.2%   | 1.6%  |
| No time (unspecified)                                                                                  | 0.6%  | 2.1%   | 1.2%  |
| Fear of water / can't swim                                                                             | 0.9%  | 1.2%   | 1.0%  |
| I only went once                                                                                       | 1.3%  | 0.5%   | 1.0%  |
| No opportunity                                                                                         | 0.9%  | 0.9%   | 0.9%  |
| No access to a boat                                                                                    | 1.0%  | 0.6%   | 0.8%  |
| My boat\equipment needs replacing and I haven't got round to buying new                                | 0.4%  | 0.3%   | 0.4%  |
| I have swapped to do a different boating category\watersport and stopped                               | 0.1%  | 0.5%   | 0.3%  |
| Left job which involved activity                                                                       | 0.4%  | 0.0%   | 0.2%  |
| Don't like boats                                                                                       | 0.0%  | 0.5%   | 0.2%  |
| Other                                                                                                  | 1.0%  | 1.4%   | 1.1%  |
| Don't Know                                                                                             | 6.1%  | 6.1%   | 6.1%  |
| Unweighted Base                                                                                        | 535   | 431    | 966   |

Source: Watersports participation survey 2009 (Base: all respondents who have not participated in the respective activity categories in the last 12 months but have done so at some point in the past)

More males than females name work commitments as a reason that they no longer participate in watersports. Dropping it for another hobby that now takes up their time is also more prevalent amongst males.

Table 30 Reasons Why Stopped Participating in Other Watersports by Gender

|                                                                                                        | Male  | Female | All   |
|--------------------------------------------------------------------------------------------------------|-------|--------|-------|
| I lost interest in the activity                                                                        | 16.1% | 16.6%  | 16.3% |
| I didn't have time to take part due to work commitments                                                | 15.6% | 9.8%   | 13.2% |
| My personal circumstances have changed (e.g got married\had a child\went to university etc)            | 10.2% | 11.3%  | 10.7% |
| Only participated as a child at school\summer camp etc                                                 | 9.2%  | 11.2%  | 10.0% |
| I only participate on holiday and we did something different\didn't go last year                       | 8.5%  | 11.3%  | 9.7%  |
| Health reasons meant I couldn't take part                                                              | 6.0%  | 9.0%   | 7.2%  |
| I have new hobbies\activities which I prefer spending time doing instead                               | 8.4%  | 4.1%   | 6.6%  |
| I am trying to save money\cannot afford it                                                             | 6.0%  | 5.3%   | 5.7%  |
| I am at the time of my life now where it is too physically\mentally challenging                        | 5.4%  | 5.8%   | 5.6%  |
| I moved and no longer have easy access to suitable water                                               | 5.0%  | 5.6%   | 5.2%  |
| I only participated because other family members\friends were involved and when they stopped, so did I | 3.3%  | 3.8%   | 3.5%  |
| The weather was not good enough in the last 12 months                                                  | 2.2%  | 2.9%   | 2.5%  |
| No interest                                                                                            | 1.6%  | 2.7%   | 2.0%  |
| No time (unspecified)                                                                                  | 1.8%  | 1.0%   | 1.4%  |
| I only went once                                                                                       | 0.7%  | 1.2%   | 0.9%  |
| No opportunity                                                                                         | 0.5%  | 1.3%   | 0.8%  |
| Fear of water / can't swim                                                                             | 0.2%  | 1.2%   | 0.6%  |
| I have swapped to do a different boating category\watersport and stopped                               | 0.6%  | 0.5%   | 0.5%  |
| I had to sell my boat\equipment                                                                        | 0.6%  | 0.2%   | 0.4%  |
| Left job which involved activity                                                                       | 0.4%  | 0.2%   | 0.3%  |
| No access to a boat                                                                                    | 0.4%  | 0.2%   | 0.3%  |
| My boat\equipment needs replacing and I haven't got round to buying new                                | 0.4%  | 0.1%   | 0.3%  |
| Don't like boats                                                                                       | 0.0%  | 0.0%   | 0.0%  |
| Other                                                                                                  | 1.7%  | 1.7%   | 1.7%  |
| Don't Know                                                                                             | 6.5%  | 5.4%   | 6.0%  |
| Unweighted Base                                                                                        | 1,230 | 916    | 2,146 |

Source: Watersports participation survey 2009 (Base: all respondents who have not participated in the respective activity categories in the last 12 months but have done so at some point in the past)

## 4. Frequency of Participation

Each participant in an activity was asked how often they had participated over the last 12 months. This is compared to the number of actual events a respondent reports later in the survey to improve the accuracy of the estimates. If there is a discrepancy between the two estimates, the respondent is asked which one they think is a better reflection of their participation. For those participating more than 25 times in an activity their actual participation rate was taken into account when calculating the average participation.

The average participation is estimated from this data, taking into account the checks described above. 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, actual reported figure for 25+).

Table 33 and Table 34 show how that for most activities many more events take place in the UK than abroad. For example, the average participation for canoeing is 6.9 times a year in the UK, compared to 1.3 times while abroad. Canal boating, as in previous years, is the activity people are least likely to do abroad. 2,797,000 people have participated in at least one boating activity in the UK during the last 12 months and 1,515,000 have participated abroad in at least one boating activity abroad. These categories are however not mutually exclusive; people who have participated in the UK may or may not have also participated abroad, and vice versa. 2,020,000 people have only participated in the UK, 737,000 have only participated abroad. 777,000 people have participated both in the UK and abroad.

Leisure sub-aqua diving continues to be the activity most likely to be undertaken exclusively abroad. In 2009, as was the case in 2008, more than half those participating in leisure sub-aqua diving only did so abroad. In 2009, two activities record a greater number of people participating abroad than in the UK; windsurfing and waterskiing. Using personal watercraft, which in 2008 had more people participating abroad than in the UK, is in 2009 more common in the UK. However, the difference between participant numbers in the UK and abroad is very small. One in four of those who participated in personal watercraft activities did so exclusively abroad.

Between 2006 and 2007 we recorded an increase in the participation taking place abroad. In 2008 average participation abroad had either stayed stable or dropped slightly for most activities. In 2009 the trends vary with around a third of activities staying relatively stable (canoeing, small sail boat activities, windsurfing, canal boating), three have seen an increase (water skiing, yacht cruising and yacht racing) and the remainder recording a drop in average participation abroad.

Table 34 shows that windsurfing and using a personal watercraft are the most popular activities that take place abroad. Overall, this results in a reduction of participation abroad and we suspect this is a reflection of the decline in the number of holidays taken abroad in 2009, and a reduction in spend while abroad.

Table 33 also shows variations in the average number of times people are participating in an activity in the UK. Angling from the shore has the largest proportion of people participating very frequently in the UK; a fifth of those angling from the shore do so in the UK more than 25 times a year. Indeed Figure 11 shows that this behaviour has remained stable from 2008. The biggest drop in UK participation is for kitesurfing (Figure 11). Some activities have low base numbers, which needs to be taken into account when interpreting these figures.

- Of the 12 original activities only four show increases in the average number of times people are participating in the UK, for example average participation in canoeing in 2009 was 6.9 compared to 4.9 in 2008.
- Average participation for rowing in the UK has for example dropped from 13 times in 2007 to 6.1 times in 2008 and has remained at this level in 2009. Canal boating records a stable participation level compared with 2008.
- A number of activities show extensive drops, yacht racing has dropped from an average participation of 22.5 in 2008 to 6 and small sail boat racing from 15.2 in 2008 to 4.7 in 2009. So while more people are taking part in the activities, those that do take part do so less often than in 2008. In our view this reflects a recovery in casual participation.

For the additional water related activities, 6 activities have increased their average frequency and a further two have remained stable. Largest increases are among 'kitesurfing' and 'spending general leisure time at the beach'. The two activities which had seen big drops in average participation in 2008, 'surfboarding' and 'angling from a boat', have both seen further, smaller drops in 2009 to 6.8 times and 6.1 times respectively.

The volume of casual participation becomes is very significant in all activities. Table 31 shows that about three quarters of participation is casual, regardless of activity type. Sailing activities are more likely to attract 'occasional' participants whilst other watersports activities have a larger group of 'enthusiasts'.

Table 31 Level of Participation (percentages)

|                     | Casual (1-5 times a year) | Occasional (6-12 times a year) | Enthusiast (13+ times a year) | Unweighted Base |
|---------------------|---------------------------|--------------------------------|-------------------------------|-----------------|
| Sailing             | 76.3%                     | 13.2%                          | 10.5%                         | 263             |
| Motor/Power boating | 79.1%                     | 9.0%                           | 11.8%                         | 297             |
| Other Watersports   | 77.4%                     | 9.5%                           | 13.1%                         | 420             |
| Average             | 77.6%                     | 10.6%                          | 11.8%                         |                 |

Table 32 Level of Participation (participants)

|                     | Casual (1-5 times a year) | Occasional (6-12 times a year) | Enthusiast (13+ times a year) | Unweighted Base |
|---------------------|---------------------------|--------------------------------|-------------------------------|-----------------|
| Sailing             | 883656                    | 153410                         | 121736                        | 263             |
| Motor/Power boating | 1025621                   | 117296                         | 153607                        | 297             |
| Other Watersports   | 1510632                   | 185412                         | 254864                        | 420             |

Table 33 Frequency of Participation in the UK

|                                            | Frequency of participation |       |           |            |             |                    |      | Average participation |      |      |      |      |      |      |
|--------------------------------------------|----------------------------|-------|-----------|------------|-------------|--------------------|------|-----------------------|------|------|------|------|------|------|
|                                            | Never                      | Once  | 2-5 times | 6-12 times | 13-25 times | More than 25 times | Base | 2009                  | 2008 | 2007 | 2006 | 2005 | 2004 | 2003 |
| Canoeing                                   | 20.1%                      | 27.2% | 33.1%     | 9.3%       | 4.4%        | 6.0%               | 270  | 6.9                   | 4.9  | 3.9  | 4.3  | 5.7  | 3.6  | 3.6  |
| Water skiing                               | 39.5%                      | 19.9% | 19.8%     | 6.3%       | 8.8%        | 5.6%               | 69   | 6.3                   | 8.7  | 4.7  | 4.5  | 5.7  | 1.6  | 3.4  |
| Small sail boat activities                 | 20.1%                      | 24.6% | 32.7%     | 14.9%      | 2.5%        | 5.3%               | 123  | 5.0                   | 7.7  | 4.8  | 4.9  | 5.1  | 4.4  | 5.2  |
| Rowing/Sculling                            | 9.9%                       | 41.1% | 31.3%     | 8.1%       | 2.9%        | 6.6%               | 75   | 6.1                   | 6.1  | 13.0 | 9.2  | 9.6  | 5.0  | 5.7  |
| Windsurfing                                | 39.7%                      | 18.4% | 30.4%     | 3.5%       | 4.5%        | 3.5%               | 58   | 4.1                   | 3.5  | 1.6  | 4.0  | 5.3  | 3.7  | 3.4  |
| Using personal watercraft                  | 40.0%                      | 21.1% | 25.4%     | 2.1%       | 3.5%        | 7.8%               | 71   | 4.4                   | 3.4  | 2.2  | 4.9  | 4.1  | 4.1  | 3.8  |
| Motor boating/Cruising                     | 24.6%                      | 34.3% | 25.7%     | 9.3%       | 1.6%        | 4.4%               | 110  | 4.5                   | 4.8  | 4.8  | 4.7  | 4.5  | 4.7  | 4.1  |
| Yacht cruising                             | 27.7%                      | 26.1% | 20.4%     | 14.7%      | 4.6%        | 6.5%               | 90   | 5.4                   | 4.5  | 6.1  | 4.0  | 3.9  | 4.7  | 2.6  |
| Power boating                              | 32.8%                      | 20.2% | 20.4%     | 10.5%      | 7.5%        | 8.6%               | 123  | 6.8                   | 8.7  | 5.2  | 6.0  | 5.1  | 4.5  | 5.7  |
| Small sail boat racing*                    | 10.4%                      | 30.5% | 46.2%     | 4.1%       | 3.9%        | 4.9%               | 33*  | 4.7                   | 15.2 | 9.1  | 4.3  | 8.7  | 4.6  | 4.1  |
| Canal boating                              | 2.0%                       | 59.1% | 27.8%     | 4.0%       | 3.3%        | 3.8%               | 77   | 3.8                   | 3.7  | 2.7  | 2.3  | 2.3  | 3.7  | 2.3  |
| Yacht racing*                              | 3.0%                       | 31.5% | 42.7%     | 13.3%      | 0.0%        | 9.6%               | 21*  | 6.0                   | 22.5 | 13.3 | 4.6  | 8.8  | 8.9  | 7.6  |
| Surfboarding                               | 18.4%                      | 29.0% | 34.2%     | 8.7%       | 4.1%        | 5.5%               | 135  | 6.8                   | 7.9  | 14.1 | 5.3  | 7.4  | 9.0  | n/a  |
| Kitesurfing*                               | 45.2%                      | 29.8% | 10.7%     | 0.0%       | 5.7%        | 8.6%               | 13*  | 5.0                   | 2.1  | 2.9  | 1.8  | 4.0  | 4.4  | n/a  |
| Angling (from a boat)                      | 21.2%                      | 26.3% | 37.2%     | 6.6%       | 4.2%        | 4.5%               | 107  | 6.1                   | 6.4  | 11.4 | 7.0  | 4.9  | 7.5  | n/a  |
| Angling (from the shore)                   | 8.5%                       | 13.1% | 31.8%     | 18.3%      | 8.0%        | 20.3%              | 195  | 13.4                  | 12.5 | 12.7 | 13.1 | 9.5  | 10.4 | n/a  |
| Cliff climbing                             | 18.8%                      | 30.3% | 30.1%     | 13.2%      | 3.7%        | 3.9%               | 83   | 5.9                   | 5.8  | 5.8  | 4.0  | 4.2  | 4.2  | n/a  |
| Coastal walking                            | 5.7%                       | 16.0% | 40.9%     | 20.0%      | 6.6%        | 10.8%              | 1173 | 13.2                  | 12.1 | 12.7 | 11.2 | 10.9 | 9.9  | n/a  |
| Outdoor swimming                           | 34.5%                      | 18.3% | 29.6%     | 10.1%      | 3.9%        | 3.6%               | 1140 | 5.1                   | 3.8  | 4.8  | 9.3  | 4.1  | 4.1  | n/a  |
| Leisure sub-aqua diving                    | 52.4%                      | 9.4%  | 17.2%     | 9.6%       | 8.6%        | 2.7%               | 97   | 4.5                   | 3.1  | 4.2  | 4.8  | 3.2  | 8.4  | n/a  |
| Spending general leisure time at the beach | 12.2%                      | 15.6% | 35.9%     | 19.9%      | 7.6%        | 8.8%               | 1402 | 9.9                   | 7.4  | 7.6  | 6.0  | 8.0  | 5.0  | n/a  |

Source: Watersports participation survey 2009 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Table 34 Frequency of Participation Abroad

|                            | Frequency of participation |       |           |            |             |                    | Base | Average participation |      |      |      |      |      |      |
|----------------------------|----------------------------|-------|-----------|------------|-------------|--------------------|------|-----------------------|------|------|------|------|------|------|
|                            | Never                      | Once  | 2-5 times | 6-12 times | 13-25 times | More than 25 times |      | 2009                  | 2008 | 2007 | 2006 | 2005 | 2004 | 2003 |
| Canoeing                   | 66.4%                      | 18.5% | 10.8%     | 2.4%       | 0.5%        | 1.5%               | 270  | 1.3                   | 1.4  | 1.7  | 0.8  | 1.4  | 0.8  | 1.6  |
| Water skiing               | 35.1%                      | 18.9% | 26.9%     | 11.6%      | 2.1%        | 5.5%               | 69   | 4.2                   | 1.5  | 3.3  | 2.3  | 2.2  | 3.1  | 1.7  |
| Small sail boat activities | 57.7%                      | 20.0% | 17.9%     | 3.0%       | 0.0%        | 1.3%               | 123  | 1.5                   | 1.6  | 1.7  | 1.3  | 1.4  | 2.2  | 1.5  |
| Rowing/Sculling            | 70.0%                      | 10.8% | 17.2%     | 2.0%       | 0.0%        | 0.0%               | 75   | 0.9                   | 1.4  | 1.5  | 0.3  | 0.4  | 1.0  | 1.7  |
| Windsurfing                | 37.7%                      | 24.6% | 33.5%     | 1.8%       | 0.0%        | 2.5%               | 58   | 2.3                   | 2.2  | 2.6  | 1.7  | 1.9  | 2.1  | 1.8  |
| Using personal watercraft  | 41.4%                      | 31.8% | 21.0%     | 4.3%       | 0.0%        | 1.5%               | 71   | 1.9                   | 2.4  | 2.8  | 2.3  | 3.4  | 2.3  | 2.1  |
| Motor boating/Cruising     | 57.3%                      | 24.5% | 13.5%     | 3.2%       | 0.9%        | 0.6%               | 110  | 1.4                   | 1.1  | 1.8  | 2.0  | 1.4  | 1.8  | 0.5  |
| Yacht cruising             | 51.8%                      | 22.7% | 17.8%     | 3.0%       | 2.3%        | 2.4%               | 90   | 2.3                   | 0.7  | 1.6  | 1.1  | 1.6  | 0.9  | 0.9  |
| Power boating              | 53.9%                      | 24.2% | 18.3%     | 1.1%       | 0.7%        | 1.7%               | 123  | 1.6                   | 1.9  | 2.2  | 2.0  | 1.6  | 2.5  | 1.9  |
| Small sail boat racing*    | 62.0%                      | 21.0% | 14.1%     | 0.0%       | 0.0%        | 3.0%               | 33*  | 1.6                   | 3.4  | 1.3  | 1.3  | 1.8  | 2.1  | 1.4  |
| Canal boating              | 88.6%                      | 9.6%  | 0.9%      | 0.9%       | 0.0%        | 0.0%               | 77   | 0.2                   | 0.3  | 0.3  | 0.1  | 0.0  | 0.7  | 0.2  |
| Yacht racing*              | 55.7%                      | 4.6%  | 22.9%     | 12.2%      | 0.0%        | 4.7%               | 21*  | 3.4                   | 2.2  | 1.8  | 1.0  | 1.1  | 1.8  | 2.0  |

Source: Watersports participation survey 2009 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Table 35 and Table 36 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 35 Frequency of Participation in the UK (participants) 2009

|                                            | Frequency of participation |                |                  |            |             |                    | Total number of people participating in the UK | Base  |
|--------------------------------------------|----------------------------|----------------|------------------|------------|-------------|--------------------|------------------------------------------------|-------|
|                                            | Never                      | Once           | 2-5 times        | 6-12 times | 13-25 times | More than 25 times |                                                |       |
| Canoeing                                   | 253,739                    | 343,524        | <b>417,558</b>   | 117,267    | 55,051      | 75,337             | 1,008,738                                      | 270   |
| Water skiing                               | <b>124,559</b>             | 62,701         | 62,480           | 19,894     | 27,792      | 17,807             | 190,674                                        | 69    |
| Small sail boat activities                 | 111,479                    | 136,372        | <b>181,419</b>   | 82,731     | 13,928      | 29,504             | 443,953                                        | 123   |
| Rowing/Sculling*                           | 34,527                     | <b>143,779</b> | 109,571          | 28,307     | 10,171      | 23,233             | 315,060                                        | 75    |
| Windsurfing*                               | <b>104,755</b>             | 48,507         | 80,311           | 9,358      | 11,880      | 9,171              | 159,227                                        | 58    |
| Using personal watercraft                  | <b>134,678</b>             | 71,152         | 85,488           | 6,909      | 11,886      | 26,360             | 201,795                                        | 71    |
| Motor boating/Cruising                     | 116,216                    | <b>162,120</b> | 121,429          | 44,066     | 7,556       | 20,845             | 356,017                                        | 110   |
| Yacht cruising                             | <b>106,098</b>             | 100,176        | 78,285           | 56,506     | 17,612      | 24,937             | 277,517                                        | 90    |
| Power boating                              | <b>186,754</b>             | 115,340        | 116,243          | 59,567     | 42,778      | 49,199             | 383,127                                        | 123   |
| Small sail boat racing*                    | 15,297                     | 45,052         | <b>68,141</b>    | 6,124      | 5,722       | 7,231              | 132,269                                        | 33*   |
| Canal boating                              | 6,484                      | <b>189,377</b> | 88,945           | 12,910     | 10,420      | 12,077             | 313,729                                        | 77    |
| Yacht racing*                              | 2,924                      | 31,195         | <b>42,249</b>    | 13,147     | -           | 9,535              | 96,125                                         | 21*   |
| Surfboarding                               | 119,063                    | 187,247        | <b>221,065</b>   | 56,361     | 26,384      | 35,707             | 526,764                                        | 135   |
| Kitesurfing*                               | <b>25,505</b>              | 16,813         | 6,011            | -          | 3,228       | 4,840              | 30,892                                         | 13*   |
| Angling (from a boat)                      | 100,732                    | 124,544        | <b>176,165</b>   | 31,211     | 19,969      | 21,489             | 373,378                                        | 107   |
| Angling (from the shore)                   | 72,776                     | 112,313        | <b>272,483</b>   | 156,480    | 68,358      | 173,524            | 783,158                                        | 195   |
| Cliff climbing                             | 73,996                     | <b>119,200</b> | 118,464          | 52,118     | 14,578      | 15,541             | 319,901                                        | 83    |
| Coastal walking                            | 280,993                    | 784,644        | <b>2,011,435</b> | 982,828    | 326,705     | 530,926            | 4,636,538                                      | 1,173 |
| Outdoor swimming                           | 611,656                    | 778,705        | <b>1,794,626</b> | 993,790    | 378,376     | 441,622            | 4,387,119                                      | 1,140 |
| Leisure sub-aqua diving                    | <b>153,521</b>             | 81,588         | 131,600          | 44,822     | 17,445      | 15,892             | 291,348                                        | 97    |
| Spending general leisure time at the beach | <b>3,042,812</b>           | 548,013        | 1,002,006        | 560,114    | 499,773     | 159,560            | 2,769,466                                      | 1,402 |

Source: Watersports participation survey 2009 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Table 36 Frequency of Participation Abroad (participants) 2009

|                            | Frequency of participation |         |           |            |             |                    |         | Total Number of people participating abroad | Base |
|----------------------------|----------------------------|---------|-----------|------------|-------------|--------------------|---------|---------------------------------------------|------|
|                            | Never                      | Once    | 2-5 times | 6-12 times | 13-25 times | More than 25 times |         |                                             |      |
| Canoeing                   | <b>838,087</b>             | 232,930 | 136,437   | 30,411     | 5,748       | 18,866             | 424,391 | 270                                         |      |
| Water skiing               | <b>110,569</b>             | 59,469  | 84,662    | 36,644     | 6,628       | 17,261             | 204,663 | 69                                          |      |
| Small sail boat activities | <b>320,602</b>             | 111,198 | 99,678    | 16,907     | -           | 7,047              | 234,831 | 123                                         |      |
| Rowing/Sculling            | <b>244,782</b>             | 37,822  | 60,023    | 6,961      | -           | -                  | 104,806 | 75                                          |      |
| Windsurfing                | <b>99,463</b>              | 64,840  | 88,302    | 4,753      | -           | 6,624              | 164,519 | 58                                          |      |
| Using personal watercraft  | <b>139,192</b>             | 107,119 | 70,573    | 14,425     | -           | 5,163              | 197,281 | 71                                          |      |
| Motor boating/Cruising     | <b>270,797</b>             | 115,679 | 63,561    | 15,102     | 4,485       | 2,610              | 201,437 | 110                                         |      |
| Yacht cruising             | <b>198,765</b>             | 86,978  | 68,334    | 11,611     | 8,652       | 9,275              | 184,849 | 90                                          |      |
| Power boating              | <b>307,403</b>             | 137,888 | 104,543   | 6,243      | 3,853       | 9,949              | 262,477 | 123                                         |      |
| Small sail boat racing*    | <b>91,456</b>              | 30,917  | 20,737    | -          | -           | 4,457              | 56,110  | 33*                                         |      |
| Canal boating              | <b>283,729</b>             | 30,648  | 2,869     | 2,967      | -           | -                  | 36,485  | 77                                          |      |
| Yacht racing*              | <b>55,146</b>              | 4,515   | 22,651    | 12,046     | -           | 4,692              | 43,903  | 21*                                         |      |

Source: Watersports participation survey 2009 (Base: all respondents who participate in the respective activities)

\*Caution: small base size

Table 37 shows the changes in the proportion of people carrying out any participation in the UK and abroad from 2008 to 2009. Significant rises are highlighted in red and bold, significant drops in blue and bold. Ten activities have seen an increase in the proportion of people who carry out some of their in the UK in 2009. Two of these increases are statistically significant; small sail boat racing and outdoor swimming. Ten activities have seen a drop decrease in the proportion of people participating at least sometimes in the UK. However, only the drop for angling from a boat is statistically significant.

Table 37 Changes in the Location of Participation 2008 to 2009

|                                                   | Proportion of participants participating in |       |       |        |       |       |           |           |
|---------------------------------------------------|---------------------------------------------|-------|-------|--------|-------|-------|-----------|-----------|
|                                                   | UK                                          |       |       | Abroad |       |       | Base 2009 | Base 2008 |
|                                                   | Change                                      | 2009  | 2008  | Change | 2009  | 2008  |           |           |
| Canoeing                                          | -4.6%                                       | 79.9% | 84.5% | -4.3%  | 33.6% | 37.9% | 270       | 211       |
| Water skiing                                      | -11.3%                                      | 60.5% | 71.7% | 11.8%  | 64.9% | 53.1% | 69        | 62        |
| Other small sail boat activities                  | -4.9%                                       | 79.9% | 84.8% | 4.8%   | 42.3% | 37.5% | 123       | 94        |
| Rowing/Sculling                                   | -0.5%                                       | 90.1% | 90.6% | 4.2%   | 30.0% | 25.8% | 75        | 43*       |
| Windsurfing                                       | 2.2%                                        | 60.3% | 58.1% | -5.4%  | 62.3% | 67.8% | 58        | 36*       |
| Using personal watercraft                         | 8.9%                                        | 60.0% | 51.1% | -10.6% | 58.6% | 69.2% | 71        | 72        |
| General Motor boating                             | 0.8%                                        | 75.4% | 74.6% | -2.3%  | 42.7% | 44.9% | 110       | 125       |
| Yacht cruising                                    | -2.9%                                       | 72.3% | 75.3% | 3.6%   | 48.2% | 44.6% | 90        | 91        |
| Power boating                                     | -9.9%                                       | 67.2% | 77.2% | 5.5%   | 46.1% | 40.6% | 123       | 65        |
| Small sail boat racing*                           | <b>16.4%</b>                                | 89.6% | 73.3% | -13.2% | 38.0% | 51.2% | 33*       | 28*       |
| Canal boating                                     | 5.9%                                        | 98.0% | 92.1% | -2.7%  | 11.4% | 14.1% | 77        | 64        |
| Yacht racing*                                     | 1.5%                                        | 97.0% | 95.5% | 15.2%  | 44.3% | 29.1% | 21*       | 22*       |
| Surfboarding                                      | -3.8%                                       | 81.6% | 85.3% | n/a    | n/a   | n/a   | 135       | 114       |
| Kitesurfing*                                      | -22.6%                                      | 54.8% | 77.4% | n/a    | n/a   | n/a   | 13*       | 14*       |
| Angling (from a boat)                             | <b>-9.0%</b>                                | 78.8% | 87.8% | n/a    | n/a   | n/a   | 107       | 95        |
| Angling (from the shore)                          | -0.2%                                       | 91.5% | 91.7% | n/a    | n/a   | n/a   | 195       | 218       |
| Cliff climbing                                    | -3.8%                                       | 81.2% | 85.0% | n/a    | n/a   | n/a   | 83        | 76        |
| Coastal walking                                   | 0.0%                                        | 94.3% | 94.3% | n/a    | n/a   | n/a   | 1,173     | 1,208     |
| Outdoor swimming                                  | <b>5.8%</b>                                 | 65.5% | 59.7% | n/a    | n/a   | n/a   | 1,140     | 926       |
| Leisure sub-aqua diving (from the shore and boat) | 0.5%                                        | 47.6% | 47.2% | n/a    | n/a   | n/a   | 97        | 77        |
| Spending general leisure time at the beach        | 4.8%                                        | 87.8% | 83.0% | n/a    | n/a   | n/a   | 1,402     | 1,041     |

Table 38 shows the proportion of respondents from 2003 to 2009 in each of the 12 'any boating activities' who said that at least some of their participation is taking place in the UK.

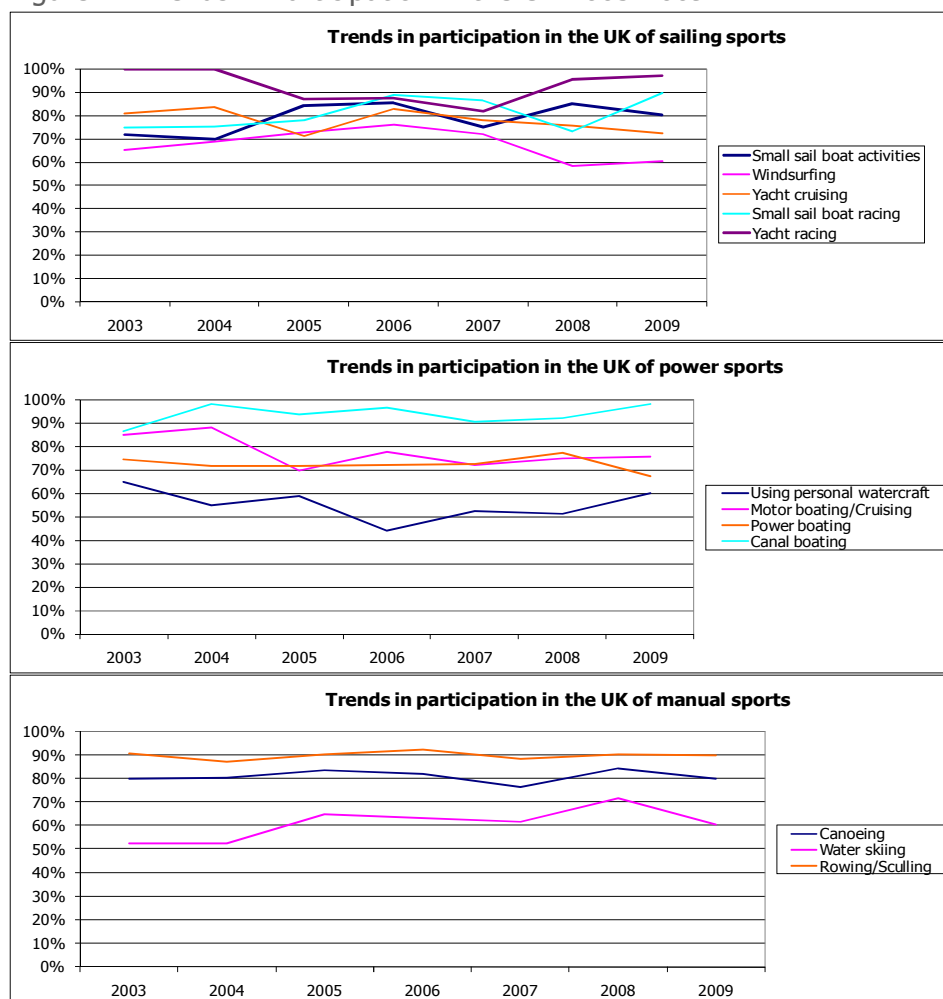
Figure 11 shows these trends in graphical format for the different groups of activities: sail, manual and power sports. From 2005 the overall sample includes Northern Ireland, which needs to be taken into account when comparing figures across the years.

There have been ups and downs in the proportion of respondents taking part in the UK over the years. Yacht racing in the UK showed a continuous decline to 2007, then increased in 2008 and has seen a further increase in 2009. In 2009 small sail boat racing has seen an increase in and is now even slightly above the prior peak of 2006. Small sail boat activities show the opposite behaviour, having seen a rise in 2008 and a decline in 2009. Power activities show little consistency with participation rates changing year on year probably affected by holiday behaviour. Using personal watercraft is consistently the activity most likely to take place abroad. The manual sports canoeing and water skiing show similar trends to each other, both of which show a drop in 2009 after an increase in 2008 and a drop in 2007.

Table 38 Trends in Participation in the UK 2003-2009

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

Figure 11 Trends in Participation in the UK 2003-2009



## 5. Where the Balance of Participation is Taking Place

For the 12 original watersports 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.

Table 39 Where Participation is Taking Place - 2009

|                            | High in UK<br>UK<br>only | Low in UK<br>low<br>abroad | High in UK<br>and<br>Abroad | Low in UK<br>and high<br>Abroad | Abroad<br>only | Base |
|----------------------------|--------------------------|----------------------------|-----------------------------|---------------------------------|----------------|------|
| Canoeing                   | 66.4%                    | 3.0%                       | 9.2%                        | 1.3%                            | 0.0%           | 270  |
| Water skiing               | 35.1%                    | 4.3%                       | 9.4%                        | 8.7%                            | 3.7%           | 69   |
| Small sail boat activities | 57.7%                    | 3.2%                       | 15.6%                       | 3.1%                            | 0.0%           | 123  |
| Rowing/Sculling            | 70.0%                    | 2.9%                       | 15.2%                       | 2.0%                            | 0.0%           | 75   |
| Windsurfing                | 37.7%                    | 3.7%                       | 14.7%                       | 4.3%                            | 0.0%           | 58   |
| Using personal watercraft  | 41.4%                    | 0.0%                       | 17.1%                       | 1.5%                            | 0.0%           | 71   |
| Motor boating/Cruising     | 57.3%                    | 4.3%                       | 12.8%                       | 1.0%                            | 0.0%           | 110  |
| Yacht cruising             | 51.8%                    | 7.4%                       | 8.1%                        | 4.7%                            | 0.0%           | 90   |
| Power boating              | 53.9%                    | 4.9%                       | 4.9%                        | 1.5%                            | 2.0%           | 123  |
| Small sail boat racing*    | 62.0%                    | 1.9%                       | 25.7%                       | 0.0%                            | 0.0%           | 33*  |
| Canal boating              | 88.6%                    | 0.6%                       | 7.8%                        | 0.0%                            | 0.9%           | 77   |
| Yacht racing*              | 55.7%                    | 9.5%                       | 17.9%                       | 9.6%                            | 4.3%           | 21*  |

## 6. Combinations of Activities

Below we compare cross participation between the 3 aggregated watersports groups described earlier. These 3 groups contain the 12 original 'any boating activities'. Table 40 presents numbers and percentages of the proportion of people who do each type of sport who also participate in other types of watersports. For example, 24% of those participating in a power activity also take part in a sailing activity.

Table 40 Grouped Watersports Combination 2009

| People who do | Also do   |      |           |      |           |      |
|---------------|-----------|------|-----------|------|-----------|------|
|               | Sail      |      | Power     |      | Manual    |      |
|               | No.       | %    | No.       | %    | No.       | %    |
| Sail          | 1,170,171 | 100% | 282,474   | 18%  | 400,248   | 23%  |
| Power         | 282,474   | 24%  | 1,537,620 | 100% | 344,981   | 20%  |
| Manual        | 400,248   | 34%  | 344,981   | 22%  | 1,713,508 | 100% |

In Table 41 we have combined data from 2007 to 2009. 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 43% of people participating in yacht racing also participate in yacht cruising.

Table 41 Watersports Combinations – Average 2007-2009

| People who do...           | Also do...   |              |                            |        |                           |                        |                |               |                        |              |               |              | Base 2007<br>2009 |
|----------------------------|--------------|--------------|----------------------------|--------|---------------------------|------------------------|----------------|---------------|------------------------|--------------|---------------|--------------|-------------------|
|                            | Canoeing     | Water skiing | Small sail boat activities | Rowing | Using personal watercraft | Motor boating/Cruising | Yacht cruising | Power boating | Small sail boat racing | Windsurfing  | Canal boating | Yacht racing |                   |
|                            | %            | %            | %                          | %      | %                         | %                      | %              | %             | %                      | %            | %             | %            |                   |
| Any boating activity       | <b>31.7%</b> | 9.5%         | 14.9%                      | 8.3%   | 9.2%                      | 16.4%                  | 11.7%          | 11.5%         | 4.8%                   | 6.4%         | 10.2%         | 3.4%         | 2,450             |
| Canoeing                   | 100.0%       | 5.1%         | 11.4%                      | 7.5%   | 4.6%                      | 6.3%                   | 5.6%           | 6.4%          | 2.6%                   | 5.6%         | 3.4%          | 2.1%         | 742               |
| Water skiing               | 17.4%        | 100.0%       | 11.4%                      | 7.7%   | 9.4%                      | 11.0%                  | 5.0%           | 15.0%         | 2.7%                   | 12.4%        | 4.2%          | 3.9%         | 218               |
| Small sail boat activities | <b>24.3%</b> | 7.3%         | 100.0%                     | 9.2%   | 4.3%                      | 9.8%                   | 10.9%          | 9.9%          | 7.2%                   | 8.8%         | 4.2%          | 5.8%         | 369               |
| Rowing/Sculling            | <b>27.8%</b> | 8.7%         | 16.7%                      | 100.0% | 4.3%                      | 13.1%                  | 5.7%           | 8.1%          | 3.9%                   | 6.4%         | 5.5%          | 2.3%         | 245               |
| Using personal watercraft  | 16.7%        | 8.7%         | 6.9%                       | 4.6%   | 100.0%                    | 14.0%                  | 3.4%           | 15.0%         | 5.1%                   | 8.1%         | 2.3%          | 3.9%         | 193               |
| Motor boating/Cruising     | 12.5%        | 6.3%         | 9.2%                       | 7.0%   | 8.2%                      | 100.0%                 | 5.7%           | 9.2%          | 3.7%                   | 3.4%         | 3.8%          | 3.3%         | 403               |
| Yacht cruising             | 15.1%        | 4.3%         | 14.1%                      | 4.6%   | 2.7%                      | 8.3%                   | 100.0%         | 8.8%          | 9.8%                   | 6.0%         | 3.3%          | 13.1%        | 260               |
| Power boating              | 17.8%        | 12.6%        | 11.9%                      | 5.8%   | 12.1%                     | 14.7%                  | 8.5%           | 100.0%        | 8.0%                   | 6.6%         | 4.3%          | 6.2%         | 282               |
| Small sail boat racing     | 15.6%        | 5.9%         | <b>24.5%</b>               | 6.5%   | 10.5%                     | 12.8%                  | <b>24.3%</b>   | <b>20.3%</b>  | 100.0%                 | <b>22.8%</b> | 6.8%          | <b>22.8%</b> | 125               |
| Windsurfing                | <b>27.4%</b> | 18.8%        | <b>20.3%</b>               | 8.1%   | 12.9%                     | 8.7%                   | 10.2%          | 12.1%         | 16.4%                  | 100.0%       | 4.8%          | 8.9%         | 164               |
| Canal boating              | 11.2%        | 3.9%         | 6.4%                       | 4.5%   | 2.0%                      | 6.1%                   | 4.0%           | 4.7%          | 3.2%                   | 2.8%         | 100.0%        | 2.4%         | 285               |
| Yacht racing               | 19.4%        | 11.0%        | <b>26.3%</b>               | 4.5%   | 10.9%                     | 16.5%                  | <b>43.4%</b>   | <b>22.9%</b>  | <b>32.1%</b>           | 17.0%        | 7.2%          | 100.0%       | 79                |

## 7. Seasonal Participation

Respondents who participated in each activity in the UK were asked in which seasons they did their activities. The seasons were defined as follows:

|                  |                       |
|------------------|-----------------------|
| Summer 2009      | June to August        |
| Spring 2009      | March to May          |
| Winter 2008/2009 | December to February  |
| Autumn 2009      | September to November |

In order to collect accurate event numbers the question allows the respondent to give a number of times they participated in each season and cross checks this result with a parallel question. This shows the proportion of events happening in each activity by season. Unsurprisingly, the majority of events take place in the summer (almost 50% of all events). Outdoor swimming, motor boating/cruising and small sail boating are the activities most concentrated in the summer. Coastal walking and angling are more year round activities.

Table 42 Proportion of Events per Season

|                                                    | Proportion of events in seasons |        |        |        |        | Respondent number |
|----------------------------------------------------|---------------------------------|--------|--------|--------|--------|-------------------|
|                                                    | Summer                          | Spring | Winter | Autumn | Total  |                   |
| Total all activities                               | 47.1%                           | 22.0%  | 14.1%  | 16.9%  | 100.0% | 2685              |
| Total boating activities                           | 50.8%                           | 22.2%  | 11.7%  | 15.3%  | 100.0% | 626               |
| Any small sail boat racing or yacht racing         | 60.6%                           | 21.1%  | 7.5%   | 10.9%  | 100.0% | 154               |
| Any small sail boat activities or yacht cruising   | 57.1%                           | 21.3%  | 8.8%   | 12.8%  | 100.0% | 43                |
| Any motor boating/cruising or canal boating        | 58.3%                           | 21.8%  | 8.6%   | 11.3%  | 100.0% | 154               |
| Canoeing                                           | 44.4%                           | 22.0%  | 15.6%  | 18.0%  | 100.0% | 216               |
| Water skiing*                                      | 47.7%                           | 23.6%  | 7.7%   | 21.0%  | 100.0% | 42*               |
| Small sail boat activities                         | 64.3%                           | 21.0%  | 3.6%   | 11.2%  | 100.0% | 101               |
| Rowing/Sculling                                    | 44.2%                           | 24.9%  | 14.7%  | 16.1%  | 100.0% | 68                |
| Windsurfing*                                       | 48.8%                           | 24.5%  | 13.8%  | 13.0%  | 100.0% | 33*               |
| Using personal watercraft*                         | 57.8%                           | 26.1%  | 3.3%   | 12.8%  | 100.0% | 43*               |
| Motor boating/Cruising                             | 66.4%                           | 16.2%  | 8.1%   | 9.4%   | 100.0% | 81                |
| Yacht cruising                                     | 55.5%                           | 21.3%  | 12.7%  | 10.4%  | 100.0% | 65                |
| Power boating                                      | 48.2%                           | 20.7%  | 14.6%  | 16.5%  | 100.0% | 83                |
| Small sail boat racing*                            | 60.4%                           | 22.8%  | 8.0%   | 8.7%   | 100.0% | 29*               |
| Canal boating                                      | 42.7%                           | 32.6%  | 9.7%   | 15.1%  | 100.0% | 75                |
| Yacht racing*                                      | 53.2%                           | 19.6%  | 9.6%   | 17.6%  | 100.0% | 20*               |
| Surfboarding                                       | 41.5%                           | 22.7%  | 17.3%  | 18.4%  | 100.0% | 110               |
| Kitesurfing*                                       | 46.1%                           | 32.1%  | 9.0%   | 12.8%  | 100.0% | 7*                |
| Angling (from a boat)                              | 40.2%                           | 21.9%  | 18.4%  | 19.6%  | 100.0% | 86                |
| Angling (from the shore)                           | 38.4%                           | 24.1%  | 18.5%  | 19.0%  | 100.0% | 177               |
| Cliff climbing                                     | 37.6%                           | 26.7%  | 19.0%  | 16.7%  | 100.0% | 68                |
| Coastal walking                                    | 37.6%                           | 24.4%  | 17.6%  | 20.4%  | 100.0% | 1,108             |
| Outdoor swimming                                   | 68.6%                           | 16.5%  | 5.7%   | 9.1%   | 100.0% | 735               |
| Leisure sub-aqua diving (from the shore and boat)* | 53.3%                           | 20.7%  | 10.1%  | 15.9%  | 100.0% | 44*               |
| Spending general leisure time at the beach         | 49.0%                           | 20.8%  | 13.6%  | 16.6%  | 100.0% | 1,229             |

Base: all respondents who participate in an activity in the UK

Source: Watersports participation survey 2009

\*Caution: small base size

Table 43 shows the actual number of events taking place in each season. To put the numbers in context there were a total of 27,693,048 'boating activity' events in the UK last year (up from 25,006,821 in 2008 and also higher than the 26,627,034 in 2007). Of these, a total of 14,094,300 events took place in the summer (which is 51% of all boating events).

Table 43 Number of Events per Season

|                                                    | Number of events in seasons |            |            |            |             | Respondent number |
|----------------------------------------------------|-----------------------------|------------|------------|------------|-------------|-------------------|
|                                                    | Summer                      | Spring     | Winter     | Autumn     | Total       |                   |
| Total any activity                                 | 92,092,369                  | 43,020,542 | 27,514,341 | 33,076,522 | 195,703,775 | 2685              |
| Total boating activity                             | 14,094,300                  | 6,161,802  | 3,235,674  | 4,230,423  | 27,722,199  | 626               |
| Any small sail boat racing or yacht racing         | 2,839,333                   | 989,474    | 349,180    | 508,520    | 4,686,507   | 154               |
| Any small sail boat activities or yacht cruising   | 698,076                     | 260,636    | 107,301    | 157,160    | 1,223,174   | 43                |
| Any motor boating/cruising or canal boating        | 1,837,214                   | 687,391    | 271,280    | 357,364    | 3,153,249   | 154               |
| Canoeing                                           | 3,724,415                   | 1,843,257  | 1,313,176  | 1,514,821  | 8,395,669   | 216               |
| Water skiing*                                      | 989,504                     | 489,419    | 160,077    | 436,321    | 2,075,320   | 42*               |
| Small sail boat activities                         | 1,743,042                   | 568,423    | 97,891     | 302,457    | 2,711,813   | 101               |
| Rowing/Sculling                                    | 899,168                     | 505,466    | 299,539    | 327,994    | 2,032,168   | 68                |
| Windsurfing*                                       | 503,950                     | 252,964    | 142,100    | 134,296    | 1,033,310   | 33*               |
| Using personal watercraft*                         | 796,228                     | 359,103    | 45,850     | 175,833    | 1,377,014   | 43*               |
| Motor boating/Cruising                             | 1,374,655                   | 334,161    | 166,654    | 193,617    | 2,069,086   | 81                |
| Yacht cruising                                     | 1,096,291                   | 421,051    | 251,289    | 206,063    | 1,974,693   | 65                |
| Power boating                                      | 1,806,411                   | 774,091    | 547,171    | 618,115    | 3,745,788   | 83                |
| Small sail boat racing*                            | 394,864                     | 149,186    | 52,387     | 56,899     | 653,336     | 29*               |
| Canal boating                                      | 462,559                     | 353,231    | 104,626    | 163,747    | 1,084,163   | 75                |
| Yacht racing*                                      | 303,212                     | 111,451    | 54,915     | 100,261    | 569,838     | 20*               |
| Surfboarding                                       | 1,794,638                   | 982,512    | 748,321    | 794,390    | 4,319,860   | 110               |
| Kitesurfing*                                       | 123,815                     | 86,240     | 24,198     | 34,535     | 268,789     | 7*                |
| Angling (from a boat)                              | 1,108,417                   | 604,110    | 506,803    | 539,570    | 2,758,900   | 86                |
| Angling (from the shore)                           | 4,309,516                   | 2,699,989  | 2,078,131  | 2,131,699  | 11,219,335  | 177               |
| Cliff climbing                                     | 851,498                     | 603,592    | 430,692    | 378,059    | 2,263,842   | 68                |
| Coastal walking                                    | 24,095,190                  | 15,626,386 | 11,233,290 | 13,048,977 | 64,003,844  | 1,108             |
| Outdoor swimming                                   | 17,005,232                  | 4,099,024  | 1,404,251  | 2,265,487  | 24,773,994  | 735               |
| Leisure sub-aqua diving (from the shore and boat)* | 1,037,445                   | 404,032    | 196,497    | 309,266    | 1,947,240   | 44*               |
| Spending general leisure time at the beach         | 27,672,319                  | 11,752,855 | 7,656,484  | 9,344,114  | 56,425,772  | 1,229             |

Base: all respondents who participate in an activity in the UK

Source: Watersports participation survey 2009

\*Caution: small base size

## 8. Distribution between Inland and Coastal Areas

Respondents participating in the UK were asked how many of the events took place at the coast or inland. Respondents participating in surfboarding, coastal walking and spending general leisure time at the beach were not asked this question, as these activities are by definition coastal activities.

Table 44 Proportion of Coastal and Inland Events in the UK

|                                                    | Proportion of events that take place at the coast | Proportion of events that take place inland | Number of respondents |
|----------------------------------------------------|---------------------------------------------------|---------------------------------------------|-----------------------|
| Total any activity                                 | 81%                                               | 19%                                         | 2685                  |
| Total boating activity                             | 49%                                               | 51%                                         | 626                   |
| Total small sail boat racing or yacht racing       | 47%                                               | 53%                                         | 154                   |
| Total small sail boat activities or yacht cruising | 68%                                               | 32%                                         | 43                    |
| Total motor boating/cruising or canal boating      | 41%                                               | 59%                                         | 154                   |
| Canoeing                                           | 35%                                               | 65%                                         | 216                   |
| Water skiing*                                      | 34%                                               | 66%                                         | 42*                   |
| Small sail boat activities                         | 55%                                               | 45%                                         | 101                   |
| Rowing/Sculling                                    | 34%                                               | 66%                                         | 68                    |
| Windsurfing*                                       | 79%                                               | 21%                                         | 33*                   |
| Using personal watercraft*                         | 66%                                               | 34%                                         | 43*                   |
| Motor boating/Cruising                             | 61%                                               | 39%                                         | 81                    |
| Yacht cruising                                     | 86%                                               | 14%                                         | 65                    |
| Power boating                                      | 66%                                               | 34%                                         | 83                    |
| Small sail boat racing*                            | 25%                                               | 75%                                         | 29*                   |
| Canal boating                                      | 3%                                                | 97%                                         | 75                    |
| Yacht racing*                                      | 72%                                               | 28%                                         | 20*                   |
| Surfboarding                                       | 100%                                              | 0%                                          | 110                   |
| Kitesurfing*                                       | 63%                                               | 37%                                         | 7*                    |
| Angling (from a boat)                              | 52%                                               | 48%                                         | 86                    |
| Angling (from the shore)                           | 33%                                               | 67%                                         | 177                   |
| Cliff climbing                                     | 21%                                               | 79%                                         | 68                    |
| Coastal walking                                    | 100%                                              | 0%                                          | 1,108                 |
| Outdoor swimming                                   | 55%                                               | 45%                                         | 735                   |
| Leisure sub-aqua diving (from the shore and boat)* | 72%                                               | 28%                                         | 44*                   |
| Spending general leisure time at the beach         | 100%                                              | 0%                                          | 1,229                 |

Base: all respondents who participate in an activity in the UK

Source: Watersports participation survey 2009

\*Caution: small base size

Table 44 shows the proportion of coastal and inland events in 2009. Over 80% of yacht cruising and over 70% of windsurfing, yacht racing and leisure sub-aqua diving take place at the coast whereas the coast is the location for a quarter or less for small sail boat racing, cliff climbing and canal boating events. Table 45 shows the actual number of events taking place in the UK and abroad.

Table 45 Number of Coastal and Inland Events in the UK

|                                                    | Number of coastal events | Number of inland events | Number of total events | Number of respondents |
|----------------------------------------------------|--------------------------|-------------------------|------------------------|-----------------------|
| Total any activity                                 | 159,045,994              | 36,657,781              | 195,703,775            | 2685                  |
| Total boating activity                             | 13,620,933               | 14,101,265              | 27,722,199             | 626                   |
| Total small sail boat racing or yacht racing       | 575,012                  | 648,162                 | 1,223,174              | 154                   |
| Total small sail boat activities or yacht cruising | 3,197,517                | 1,488,990               | 4,686,507              | 43                    |
| Total motor boating/cruising or canal boating      | 1,288,989                | 1,864,260               | 3,153,249              | 154                   |
| Canoeing                                           | 2,977,215                | 5,418,454               | 8,395,669              | 216                   |
| Water skiing*                                      | 702,018                  | 1,373,303               | 2,075,320              | 42*                   |
| Small sail boat activities                         | 1,501,948                | 1,209,866               | 2,711,813              | 101                   |
| Rowing/Sculling                                    | 684,685                  | 1,347,483               | 2,032,168              | 68                    |
| Windsurfing*                                       | 820,993                  | 212,316                 | 1,033,310              | 33*                   |
| Using personal watercraft*                         | 903,276                  | 473,739                 | 1,377,014              | 43*                   |
| Motor boating/Cruising                             | 1,252,351                | 816,736                 | 2,069,086              | 81                    |
| Yacht cruising                                     | 1,695,569                | 279,124                 | 1,974,693              | 65                    |
| Power boating                                      | 2,471,227                | 1,274,560               | 3,745,788              | 83                    |
| Small sail boat racing*                            | 164,125                  | 489,211                 | 653,336                | 29*                   |
| Canal boating                                      | 36,639                   | 1,047,524               | 1,084,163              | 75                    |
| Yacht racing*                                      | 410,888                  | 158,951                 | 569,838                | 20*                   |
| Surfboarding                                       | 4,319,860                | -                       | 4,319,860              | 110                   |
| Kitesurfing*                                       | 170,082                  | 98,707                  | 268,789                | 7*                    |
| Angling (from a boat)                              | 1,442,411                | 1,316,488               | 2,758,900              | 86                    |
| Angling (from the shore)                           | 3,667,082                | 7,552,254               | 11,219,335             | 177                   |
| Cliff climbing                                     | 478,435                  | 1,785,407               | 2,263,842              | 68                    |
| Coastal walking                                    | 64,003,844               | -                       | 64,003,844             | 1,108                 |
| Outdoor swimming                                   | 13,520,184               | 11,253,810              | 24,773,994             | 735                   |
| Leisure sub-aqua diving (from the shore and boat)* | 1,397,391                | 549,850                 | 1,947,240              | 44*                   |
| Spending general leisure time at the beach         | 56,425,772               | -                       | 56,425,772             | 1,229                 |

Base: all respondents who participate in an activity in the UK

Source: Watersports participation survey 2009. \*Caution: small base size

Table 48 below shows which proportion of the events shown in Table 45 are happening at the coast in 2009 and over the last 3 year period in order to provide an idea of trends. Significant changes are highlighted in red and bold. There are three significant drops in the proportion of events taking place on the coast:

- Small sail boat racing (down to 25.1% from a 3 year average of 49.1%)
- Cliff climbing (down to 21.1% from a 3 year average of 37.4%)
- Outdoor swimming (down to 54.6% from a 3 year average of 59.2%)

However, it needs to be borne in mind that the base size for two of these activities (small sail boat racing and cliff climbing) are small. As Table 46 shows, these decreases in the proportion of events that take place at the coast is due to an increase in absolute numbers of respondents participating in inland events rather than a decrease in the number of respondents participating in coastal events.

Only one activity shows a significant increase in the proportion of events that take place at the coast; rowing/sculling (increased to 33.7% from a 3 year average of 18%).

Table 46 Number of Coastal and Inland Events for 2009 and 2008

|                                                    | Number of<br>coastal events<br>2009 | Number of<br>inland events<br>2009 | Number of<br>coastal<br>events 2008 | Number of<br>inland events<br>2008 |
|----------------------------------------------------|-------------------------------------|------------------------------------|-------------------------------------|------------------------------------|
| Total any activity                                 | 159,045,994                         | 36,657,781                         | 129,488,563                         | 24,716,754                         |
| Total boating activity                             | 13,620,933                          | 14,101,265                         | 13,713,862                          | 11,292,958                         |
| Total small sail boat racing or yacht racing       | 575,012                             | 648,162                            | 2,419,398                           | 1,611,513                          |
| Total small sail boat activities or yacht cruising | 3,197,517                           | 1,488,990                          | 3,363,113                           | 1,686,757                          |
| Total motor boating/cruising or canal boating      | 1,288,989                           | 1,864,260                          | 1,795,693                           | 1,681,468                          |
| Canoeing                                           | 2,977,215                           | 5,418,454                          | 1,895,214                           | 2,704,828                          |
| Water skiing*                                      | 702,018                             | 1,373,303                          | 831,236                             | 1,678,942                          |
| Small sail boat activities                         | 1,501,948                           | 1,209,866                          | 1,758,708                           | 1,470,226                          |
| Rowing/Sculling                                    | 684,685                             | 1,347,483                          | 298,336                             | 823,094                            |
| Windsurfing*                                       | 820,993                             | 212,316                            | 441,941                             | 159,091                            |
| Using personal watercraft*                         | 903,276                             | 473,739                            | 883,190                             | 244,873                            |
| Motor boating/Cruising                             | 1,252,351                           | 816,736                            | 1,768,161                           | 717,754                            |
| Yacht cruising                                     | 1,695,569                           | 279,124                            | 1,604,404                           | 216,531                            |
| Power boating                                      | 2,471,227                           | 1,274,560                          | 1,785,743                           | 702,392                            |
| Small sail boat racing*                            | 164,125                             | 489,211                            | 1,258,398                           | 611,158                            |
| Canal boating                                      | 36,639                              | 1,047,524                          | 27,532                              | 963,714                            |
| Yacht racing*                                      | 410,888                             | 158,951                            | 1,161,000                           | 1,000,355                          |
| Surfboarding                                       | 4,319,860                           | -                                  | 3,931,593                           | -                                  |
| Kitesurfing*                                       | 170,082                             | 98,707                             | 135,512                             | 9,933                              |
| Angling (from a boat)                              | 1,442,411                           | 1,316,488                          | 1,946,380                           | 510,114                            |
| Angling (from the shore)                           | 3,667,082                           | 7,552,254                          | 4,427,974                           | 7,018,214                          |
| Cliff climbing                                     | 478,435                             | 1,785,407                          | 1,014,294                           | 999,250                            |
| Coastal walking                                    | 64,003,844                          | -                                  | 61,314,061                          | -                                  |
| Outdoor swimming                                   | 13,520,184                          | 11,253,810                         | 10,524,775                          | 4,729,220                          |
| Leisure sub-aqua diving (from the shore and boat)* | 1,397,391                           | 549,850                            | 938,938                             | 157,065                            |
| Spending general leisure time at the beach         | 56,425,772                          | -                                  | 31,541,175                          | -                                  |

Base: all respondents who participate in an activity in the UK

Source: Watersports participation survey 2009 and 2008

\*Caution: small base size

1,455,000 people have participated in at least one boating activity at the coast and 1,762,000 have participated in at least one boating activity inland. These numbers are rounded to the nearest 1000. Table 47 shows the exact numbers participating in at least one activity at the coast and inland. It must be borne in mind that these categories are not mutually exclusive; people who have participated at the coast may or may not have also participated inland, and vice versa. To the nearest thousand, 1,035,000 people have only participated at the coast, 1,342,000 have only participated inland. 420,000 people have participated both at the coast and inland.

Table 47 Number of People Participating in at Least One Coastal or Inland Event

|                                                   | Number of people who have participated at least once at the coast | Number of people who have participated at least once inland |
|---------------------------------------------------|-------------------------------------------------------------------|-------------------------------------------------------------|
| Any activity                                      | 9,752,541                                                         | 1,654,950                                                   |
| Any boating activity                              | 1,455,134                                                         | 1,276,861                                                   |
| Small sailboat activities or yacht cruising       | 869,754                                                           | 327,153                                                     |
| Small sailboat racing or yacht racing             | 218,067                                                           | 488,314                                                     |
| Motor boating / cruising or canal boating         | 783,693                                                           | 276,692                                                     |
| Small sail boat racing                            | 65,871                                                            | 81,078                                                      |
| Small sail boat activities                        | 261,599                                                           | 75,239                                                      |
| Yacht racing                                      | 85,443                                                            | 230,147                                                     |
| Yacht cruising                                    | 249,464                                                           | 10,682                                                      |
| Power boating                                     | 270,613                                                           | 46,545                                                      |
| Motor boating/Cruising                            | 174,243                                                           | 147,248                                                     |
| Canal boating                                     | 24,642                                                            | 205,014                                                     |
| Canoeing                                          | 398,460                                                           | 292,053                                                     |
| Rowing/Sculling                                   | 82,402                                                            | 742,555                                                     |
| Windsurfing                                       | 109,353                                                           | 236,914                                                     |
| Water skiing                                      | 88,599                                                            | 64,922                                                      |
| Using personal watercraft                         | 135,547                                                           | 125,998                                                     |
| Surfboarding                                      | 526,764                                                           | 72,490                                                      |
| Kitesurfing                                       | 24,881                                                            | -                                                           |
| Angling (from a boat)                             | 283,512                                                           | 14,078                                                      |
| Angling (from the shore)                          | 413,558                                                           | 123,223                                                     |
| Cliff climbing                                    | 186,080                                                           | 444,385                                                     |
| Coastal walking                                   | 4,636,538                                                         | 185,632                                                     |
| Spending general leisure time at the beach        | 5,101,082                                                         | -                                                           |
| Outdoor swimming                                  | 2,408,635                                                         | -                                                           |
| Leisure sub-aqua diving (from the shore and boat) | 163,735                                                           | 1,195,120                                                   |

In 2009 a total of 81% of all events were recorded as taking place on the coast, the average across 3 years is 82%. For the 12 'any boating activities' 49% of events took place at the coast compared to 50% when taking an average across the past 3 years. This is illustrated in Table 48.

Table 48 Proportion of Coastal events 2009-2008 Comparison

Base: all respondents who participate in an activity in the

|                                                    | Proportion of Coastal Events 2009 | Proportion of Coastal Events Average 2007-2009 | Change in 2009 (percentage points) | Number of respondents 2009 | Number of respondents 2007-2009 |
|----------------------------------------------------|-----------------------------------|------------------------------------------------|------------------------------------|----------------------------|---------------------------------|
| Total any activity                                 | 81.3%                             | 82.2%                                          | -1.0%                              | 2685                       | 7956                            |
| Total boating activity                             | 49.1%                             | 50.4%                                          | -1.3%                              | 626                        | 1836                            |
| Total sail boat racing or yacht racing             | 47.0%                             | 59.7%                                          | -12.7%                             | 154                        | 458                             |
| Total sail boat activities or yacht cruising       | 68.2%                             | 67.3%                                          | 0.9%                               | 43                         | 138                             |
| Total motor boating/cruising or canal boating      | 40.9%                             | 41.9%                                          | -1.1%                              | 154                        | 514                             |
| Canoeing                                           | 35.5%                             | 38.6%                                          | -3.2%                              | 216                        | 570                             |
| Water skiing*                                      | 33.8%                             | 34.8%                                          | -1.0%                              | 42*                        | 134                             |
| Small sail boat activities                         | 55.4%                             | 58.2%                                          | -2.9%                              | 101                        | 277                             |
| Rowing/Sculling                                    | 33.7%                             | 18.0%                                          | <b>15.7%</b>                       | 68                         | 173                             |
| Windsurfing*                                       | 79.5%                             | 71.1%                                          | 8.3%                               | 33*                        | 90                              |
| Using personal watercraft*                         | 65.6%                             | 69.2%                                          | -3.6%                              | 43*                        | 111                             |
| Motor boating/Cruising                             | 60.5%                             | 57.3%                                          | 3.2%                               | 81                         | 291                             |
| Yacht cruising                                     | 85.9%                             | 79.9%                                          | 5.9%                               | 65                         | 209                             |
| Power boating                                      | 66.0%                             | 71.0%                                          | -5.1%                              | 83                         | 189                             |
| Small sail boat racing*                            | 25.1%                             | 49.1%                                          | <b>-24.0%</b>                      | 29*                        | 90                              |
| Canal boating                                      | 3.4%                              | 4.8%                                           | -1.4%                              | 75                         | 236                             |
| Yacht racing*                                      | 72.1%                             | 70.1%                                          | 2.0%                               | 20*                        | 69                              |
| Surfboarding*                                      | 100.0%                            | 100.0%                                         | 0.0%                               | 110                        | 320                             |
| Kitesurfing*                                       | 63.3%                             | 80.5%                                          | -17.3%                             | 7*                         | 30                              |
| Angling (from a boat)*                             | 52.3%                             | 57.5%                                          | -5.2%                              | 86                         | 288                             |
| Angling (from the shore)                           | 32.7%                             | 36.8%                                          | -4.1%                              | 177                        | 624                             |
| Cliff climbing*                                    | 21.1%                             | 37.4%                                          | <b>-16.3%</b>                      | 68                         | 220                             |
| Coastal walking                                    | 100.0%                            | 100.0%                                         | 0.0%                               | 1108                       | 3717                            |
| Outdoor swimming                                   | 54.6%                             | 59.2%                                          | <b>-4.6%</b>                       | 735                        | 2118                            |
| Leisure sub-aqua diving (from the shore and boat)* | 71.8%                             | 74.1%                                          | -2.4%                              | 44*                        | 123                             |
| UK Spending general leisure time at the beach      | 100.0%                            | 100.0%                                         | 0.0%                               | 1229                       | 3413                            |

Source: Watersports participation survey 2007-2009

\*Caution: small base size

## 9. Club Membership

Respondents are asked if they are a member of a club for the activity or activities they participate in. For obvious reasons, this question was not asked of people participating in 'spending general leisure time at the beach'.

Table 49 shows club membership rates of over 60% for yacht racing and over 45% for leisure sub-aqua diving. Many other activities show extremely low club membership rates.

There have been no significant changes in the proportion of participants who are club members between 2009 and 2008.

Table 49 Club Membership

|                                                    | 2009  | 2008  | Change<br>(percentage<br>points) | Significance<br>Measure | Number of<br>respondents<br>2009 | Number of<br>respondents<br>2008 |
|----------------------------------------------------|-------|-------|----------------------------------|-------------------------|----------------------------------|----------------------------------|
| Canoeing                                           | 7.1%  | 5.1%  | 2.0%                             | 59%                     | 216                              | 179                              |
| Water skiing*                                      | 9.7%  | 13.1% | -3.4%                            | 38%                     | 42*                              | 44*                              |
| Small sail boat activities                         | 20.6% | 17.0% | 3.6%                             | 46%                     | 101                              | 80                               |
| Rowing/Sculling                                    | 14.2% | 8.7%  | 5.6%                             | 60%                     | 68                               | 39*                              |
| Windsurfing*                                       | 14.6% | 29.2% | -14.5%                           | 81%                     | 33*                              | 21*                              |
| Using personal watercraft*                         | 3.0%  | 6.2%  | -3.2%                            | 50%                     | 43*                              | 37*                              |
| Motor boating/Cruising                             | 9.2%  | 12.7% | -3.5%                            | 54%                     | 81                               | 94                               |
| Yacht cruising                                     | 30.2% | 25.9% | 4.3%                             | 43%                     | 65                               | 71                               |
| Power boating                                      | 14.6% | 6.7%  | 7.9%                             | 83%                     | 83                               | 51                               |
| Small sail boat racing*                            | 42.4% | 33.3% | 9.1%                             | 48%                     | 29*                              | 20*                              |
| Canal boating                                      | 6.7%  | 5.3%  | 1.4%                             | 27%                     | 75                               | 60                               |
| Yacht racing*                                      | 60.5% | 60.5% | 0.0%                             | 0%                      | 20*                              | 21*                              |
| Surfboarding                                       | 5.3%  | 2.8%  | 2.5%                             | 63%                     | 110                              | 98                               |
| Kitesurfing*                                       | 10.4% | 0.0%  | 10.4%                            | 73%                     | 7*                               | 11*                              |
| Angling (from a boat)                              | 13.4% | 15.8% | -2.4%                            | 34%                     | 86                               | 83                               |
| Angling (from the shore)                           | 15.1% | 20.2% | -5.0%                            | 80%                     | 177                              | 200                              |
| Cliff climbing                                     | 17.9% | 13.2% | 4.7%                             | 55%                     | 68                               | 64                               |
| Coastal walking                                    | 1.1%  | 1.1%  | 0.0%                             | 6%                      | 1108                             | 1142                             |
| Outdoor swimming                                   | 2.6%  | 2.5%  | 0.1%                             | 9%                      | 735                              | 553                              |
| Leisure sub-aqua diving (from the shore and boat)* | 46.9% | 41.6% | 5.4%                             | 37%                     | 44*                              | 37*                              |
| Spending general leisure time at the beach         | n/a   | n/a   | n/a                              | n/a                     | n/a                              | n/a                              |

Base: all respondents who participate in an activity in the UK

Source: Watersports participation survey 2007 and 2008

\*Caution: small base size

Table 50 shows the number of times club members and non-club members who participated in 2009. It shows, as was the case in previous years, that for some activities there is a clear relationship between the number of events and club membership. For example, only 21% of respondents who participate in small sail boat activities in the UK said they are a club member, but these people contribute 44% of the total events in that activity in 2009. Club members for leisure sub-aqua diving generate 77% of the total events and club members for yacht racing account for almost 90% of total events in the UK. As with the other tables in this report, the small base size for several of these activities needs to be taken into account when interpreting the results.

Table 50 Number of Events by Club Membership Status

|                                                    | Club member              |                         |                        |                       |                       | Non-club member          |                         |                        |                       |                       | Total number of respondents |
|----------------------------------------------------|--------------------------|-------------------------|------------------------|-----------------------|-----------------------|--------------------------|-------------------------|------------------------|-----------------------|-----------------------|-----------------------------|
|                                                    | Number of coastal events | Number of inland events | Total Number of events | UK participant number | Number of respondents | Number of coastal events | Number of inland events | Total number of events | UK participant number | Number of respondents |                             |
| Canoeing                                           | 968,751                  | 2,113,077               | 3,081,828              | 71,875                | 13                    | 2,008,465                | 3,305,376               | 5,313,841              | 936,863               | 203                   | 216                         |
| Water skiing*                                      | 19,265                   | 497,083                 | 516,348                | 18,455                | 4                     | 682,753                  | 876,219                 | 1,558,972              | 172,219               | 38                    | 42*                         |
| Small sail boat activities                         | 516,272                  | 682,594                 | 1,198,867              | 91,349                | 22                    | 985,675                  | 527,271                 | 1,512,947              | 352,605               | 79                    | 101                         |
| Rowing/Sculling                                    | 530,730                  | 862,425                 | 1,393,155              | 44,862                | 10                    | 153,955                  | 485,057                 | 639,012                | 270,198               | 58                    | 68                          |
| Windsurfing*                                       | 267,020                  | 104,153                 | 371,173                | 23,290                | 4                     | 553,973                  | 108,164                 | 662,137                | 135,937               | 29                    | 33*                         |
| Using personal watercraft*                         | 18,371                   | -                       | 18,371                 | 6,124                 | 1                     | 872,419                  | 467,496                 | 1,339,915              | 195,671               | 42                    | 43*                         |
| Motor boating/Cruising                             | 355,572                  | 205,252                 | 560,824                | 32,601                | 7                     | 896,779                  | 611,484                 | 1,508,263              | 323,416               | 74                    | 81                          |
| Yacht cruising                                     | 885,789                  | 35,184                  | 920,973                | 83,909                | 20                    | 805,323                  | 243,940                 | 1,049,263              | 193,608               | 45                    | 65                          |
| Power boating                                      | 693,393                  | 518,504                 | 1,211,897              | 56,085                | 12                    | 1,777,835                | 756,056                 | 2,533,891              | 327,042               | 71                    | 83                          |
| Small sail boat racing*                            | 28,504                   | 388,307                 | 416,811                | 56,018                | 12                    | 135,621                  | 100,904                 | 236,525                | 76,252                | 17                    | 29*                         |
| Canal boating                                      | -                        | 112,581                 | 112,581                | 20,979                | 5                     | 36,639                   | 934,943                 | 971,582                | 292,750               | 70                    | 75                          |
| Yacht racing*                                      | 351,018                  | 158,951                 | 509,969                | 58,167                | 13                    | 59,870                   | -                       | 59,870                 | 37,958                | 7                     | 20*                         |
| Surfboarding                                       | 1,386,451                | -                       | 1,386,451              | 27,803                | 5                     | 2,933,409                | -                       | 2,933,409              | 498,962               | 105                   | 110                         |
| Kitesurfing*                                       | 32,276                   | 32,276                  | 64,553                 | 3,228                 | 1                     | 137,806                  | 66,430                  | 204,236                | 27,664                | 6                     | 7*                          |
| Angling (from a boat)                              | 188,899                  | 159,155                 | 348,053                | 50,102                | 11                    | 1,253,513                | 1,157,334               | 2,410,846              | 323,276               | 75                    | 86                          |
| Angling (from the shore)                           | 899,236                  | 1,628,153               | 2,527,389              | 118,282               | 30                    | 2,767,846                | 5,924,100               | 8,691,946              | 664,876               | 147                   | 177                         |
| Cliff climbing                                     | 85,408                   | 1,010,936               | 1,096,344              | 57,388                | 11                    | 393,027                  | 774,471                 | 1,167,498              | 262,513               | 57                    | 68                          |
| Coastal walking                                    | 908,758                  | -                       | 908,758                | 49,329                | 14                    | 63,095,086               | -                       | 63,095,086             | 4,587,209             | 1,094                 | 1,108                       |
| Outdoor swimming                                   | 814,359                  | 1,821,047               | 2,635,406              | 85,158                | 18                    | 12,705,826               | 9,432,763               | 22,138,589             | 3,188,577             | 717                   | 735                         |
| Leisure sub-aqua diving (from the shore and boat)* | 996,785                  | 510,863                 | 1,507,648              | 99,463                | 19                    | 400,606                  | 38,986                  | 439,592                | 112,511               | 25                    | 44*                         |
| Spending general leisure time at the beach         | -                        | -                       | -                      | -                     | -                     | 56,425,772               | -                       | 56,425,772             | 5,101,082             | 1,229                 | 1,229                       |

Base: all respondents who participate in an activity in the UK  
Source: Watersports participation survey 2009  
\*Caution: small base size



## 10. Boat Ownership

The boat ownership questions were asked for the first time in 2007. 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.

In the 2009 questionnaire Motor boats were split out into Day Motor boats and Other Motor boats<sup>7</sup>. In all tables we are showing 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

In 2008 the small sailing boat numbers showed an unusually large drop compared to the numbers reported in the 2007 survey. Our investigations at the time suggested that the scale of decline did not reflect what was actually happening in the market. Therefore an adjusted estimate was reported in 2008. Analysing the data collected in 2009 reveals that the boat ownership rate for small sailing boats in 2009 is exactly the same as the pre-adjusted rate of 2008. Therefore it seems that the ownership rate reported in 2007 was too high rather than the 2008 figure too low. In the following tables we are therefore using the pre-adjusted 2008 figures for 2008 and 'any boat'.

2.73% of all those surveyed said their household owns at least one craft from the list of boat types presented. We also show the lower and upper 90% confidence intervals around this estimate in the table below. For example, we can be 90% certain that the true figure of households owning any type of boat from the list below lies between 2.50% and 2.97% in 2009 (compared to 2.24% and 2.69% in 2008 and 2.58% and 3.07% in 2007).

We can use a UK household estimate of 24.9 million households to convert these proportions into an estimate of the number of households owning any type of boat. Using this method, c. 681,000 of UK households own any kind of boat. The boat 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.

Table 51 Penetration of Boat Ownership in UK Households

|                                 | % of households owning a boat |         |         | Number of households owning a boat | Min 90% number | Max 90% number |
|---------------------------------|-------------------------------|---------|---------|------------------------------------|----------------|----------------|
|                                 |                               | Min 90% | Max 90% |                                    |                |                |
| Any boat                        | 2.73%                         | 2.50%   | 2.97%   | 680,835                            | 621,701        | 739,968        |
| Small sailing boat              | 0.54%                         | 0.43%   | 0.64%   | 134,056                            | 107,522        | 160,590        |
| Sailing yacht                   | 0.24%                         | 0.16%   | 0.31%   | 58,648                             | 41,071         | 76,225         |
| Power Boat                      | 0.22%                         | 0.15%   | 0.28%   | 53,797                             | 36,961         | 70,633         |
| Motor boat (Day or Other)       | 0.36%                         | 0.27%   | 0.45%   | 89,386                             | 67,700         | 111,072        |
| Day Motor boat                  | 0.22%                         | 0.15%   | 0.29%   | 54,441                             | 37,505         | 71,378         |
| Other Motor boat                | 0.14%                         | 0.09%   | 0.19%   | 34,945                             | 21,371         | 48,519         |
| Canal boat                      | 0.05%                         | 0.02%   | 0.09%   | 13,128                             | 4,805          | 21,452         |
| Canoe\Kayak                     | 1.10%                         | 0.95%   | 1.25%   | 273,344                            | 235,561        | 311,126        |
| Rowing boat                     | 0.07%                         | 0.03%   | 0.10%   | 16,357                             | 7,067          | 25,648         |
| RIBs\Inflatables or sportsboats | 0.12%                         | 0.07%   | 0.17%   | 29,926                             | 17,363         | 42,489         |
| Windsurfer                      | 0.28%                         | 0.20%   | 0.35%   | 68,540                             | 49,542         | 87,538         |
| Personal watercraft             | 0.13%                         | 0.08%   | 0.18%   | 32,889                             | 19,719         | 46,058         |
| Base                            | 12,683                        |         |         | 24,900,000                         |                |                |

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

<sup>7</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.

The following table shows boat ownership penetration in UK households for 2009 and compares these with the results from 2008. The proportion of UK households owning any kind of boat from the list has increased in 2009 to 2.73% from 2.47% in 2008 but is still slightly lower than the 2.83% recorded in 2007. The increase in ownership of any type of boat is driven by an increase in canoes/kayaks ownership. However, this increase in overall ownership is not statistically significant.

Ownership of canoes/kayaks is the only significant increase in boat ownership by boat type between 2008 and 2009.

There are two significant drops:

- Rowing boats
- RIBs (Rigid Inflatable Boats)/inflatables or sportsboats

Boat ownership for four other boat types has decreased slightly but not significantly. These are (in order from biggest to smallest decrease):

- Power boats
- Sailing yachts
- Canal boats
- Windsurfers

The remaining boats types have stayed stable.

Table 52 Penetration of Boat Ownership in UK Households 2009 vs 2008

| % of households owning a boat    |        |        |                                      |                         |
|----------------------------------|--------|--------|--------------------------------------|-------------------------|
|                                  | 2009   | 2008   | Difference<br>(percentage<br>points) | Significance<br>Measure |
| Any boat                         | 2.73%  | 2.47%  | 0.27%                                | 82%                     |
| Small sailing boat               | 0.54%  | 0.54%  | 0.00%                                | 2%                      |
| Sailing yacht                    | 0.24%  | 0.28%  | -0.04%                               | 52%                     |
| Power Boat                       | 0.22%  | 0.28%  | -0.06%                               | 69%                     |
| Motor boat (Day or Other)        | 0.36%  | 0.36%  | 0.00%                                | 0%                      |
| Day Motor boat                   | 0.22%  | n/a    | n/a                                  | n/a                     |
| Other Motor boat                 | 0.14%  | n/a    | n/a                                  | n/a                     |
| Canal boat                       | 0.05%  | 0.09%  | -0.04%                               | 76%                     |
| Canoe\Kayak                      | 1.10%  | 0.73%  | 0.36%                                | <b>100%</b>             |
| Rowing boat                      | 0.07%  | 0.14%  | -0.07%                               | <b>93%</b>              |
| RIBS \Inflatables or sportsboats | 0.12%  | 0.21%  | -0.09%                               | <b>91%</b>              |
| Windsurfer                       | 0.28%  | 0.29%  | -0.02%                               | 19%                     |
| Personal watercraft              | 0.13%  | 0.13%  | 0.00%                                | 1%                      |
| Base                             | 12,683 | 12,637 |                                      |                         |

Source: Watersports and Leisure Omnibus Survey 2009 and 2008 (Base: all respondents - 12,683 and 12,637 adults aged 16+ respectively)

Table 53 shows that there is a relationship between a household owning a boat and whether or not a respondent has participated in the activity. Those who own boats are consistently more likely to participate in any boating activity than those who do not.

Table 53 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                        | 60.18%                                                                                  | 5.72%                                                                                                |
| Small sailing boat              | 59.68%                                                                                  | 6.92%                                                                                                |
| Sailing yacht                   | 81.04%                                                                                  | 7.03%                                                                                                |
| Power Boat                      | 61.28%                                                                                  | 7.08%                                                                                                |
| Motor boat (Day or Other)       | 49.67%                                                                                  | 7.05%                                                                                                |
| Day Motor boat                  | 45.40%                                                                                  | 7.12%                                                                                                |
| Other Motor boat                | 56.33%                                                                                  | 7.13%                                                                                                |
| Canal boat                      | 56.22%                                                                                  | 7.17%                                                                                                |
| Canoe\Kayak                     | 68.85%                                                                                  | 6.52%                                                                                                |
| Rowing boat                     | 15.51%                                                                                  | 7.19%                                                                                                |
| RIBS\Inflatables or sportsboats | 68.04%                                                                                  | 7.13%                                                                                                |
| Windsurfer                      | 56.41%                                                                                  | 7.06%                                                                                                |
| Personal watercraft             | 65.97%                                                                                  | 7.12%                                                                                                |
| Base                            | 787                                                                                     | 606                                                                                                  |

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

Table 54 looks at the proportion of households owning boats 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 types, a result which has been consistent since 2007. In 2009 C1 households show higher ownership rates for power boat and personal watercraft. This was also the case in 2007 but not 2008. These households also have the highest ownership for Day Motor boats (which was asked for the first time in 2009). When taking the overall Motor boat figure however, households from the socio-economic group AB have the higher ownership rate.

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>4.51%</b>                  | 3.49%        | 1.59% | 2.73%             |
| Small sailing boat              | <b>1.27%</b>                  | 0.49%        | 0.27% | 0.54%             |
| Sailing yacht                   | <b>0.45%</b>                  | 0.32%        | 0.10% | 0.24%             |
| Power Boat                      | 0.24%                         | <b>0.28%</b> | 0.17% | 0.22%             |
| Motor boat (Day or Other)       | <b>0.46%</b>                  | 0.36%        | 0.32% | 0.36%             |
| Day Motor boat                  | 0.25%                         | <b>0.27%</b> | 0.18% | 0.22%             |
| Other Motor boat                | <b>0.21%</b>                  | 0.09%        | 0.14% | 0.14%             |
| Canal boat                      | <b>0.08%</b>                  | 0.03%        | 0.06% | 0.05%             |
| Canoe\Kayak                     | <b>1.82%</b>                  | 1.75%        | 0.43% | 1.10%             |
| Rowing boat                     | <b>0.13%</b>                  | 0.06%        | 0.05% | 0.07%             |
| RIBS\Inflatables or sportsboats | <b>0.29%</b>                  | 0.10%        | 0.06% | 0.12%             |
| Windsurfer                      | <b>0.48%</b>                  | 0.41%        | 0.12% | 0.28%             |
| Personal watercraft             | 0.07%                         | <b>0.20%</b> | 0.12% | 0.13%             |
| Base                            | 2,334                         | 3,263        | 7,086 | 12,683            |

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

Table 55 shows the differences between 2008 and 2009 for the different socio-economic groups. Significant changes are highlighted in red. The C1 socio-economic group is the only group showing a significant increase in ownership for 'any type of boat', rising from 2.52% in 2008 to 3.49% in 2009. The increase in ownership of any type of boat observed in the C1 group is largely driven by an increase in canoes/kayaks. (Even so this is a very large increase so needs to be treated with caution.) Boat ownership in the AB socio-economic group has dropped by 0.31%, while in the C2DE group it has increased very slightly. Neither of the changes seen in the AB and C2DE groups for 'any type of boat' are statistically significant. Canal boats, rowing boats and sailing yachts show drops across all three socio-economic groups.

Table 55 Percentage Change in Penetration of Boat Ownership in UK Households by SEG 2009 vs. 2008

| % of households owning a boat   |        |        |        |        |
|---------------------------------|--------|--------|--------|--------|
|                                 | AB     | C1     | C2DE   | All UK |
| Any boat                        | -0.31% | 0.97%  | 0.08%  | 0.27%  |
| Small sailing boat              | -0.08% | -0.10% | 0.09%  | 0.00%  |
| Sailing yacht                   | -0.12% | -0.04% | -0.02% | -0.04% |
| Power Boat                      | -0.19% | 0.05%  | -0.08% | -0.06% |
| Motor boat (Day or Other)       | -0.15% | 0.06%  | 0.02%  | 0.00%  |
| Day Motor boat                  | n/a    | n/a    | n/a    | n/a    |
| Other Motor boat                | n/a    | n/a    | n/a    | n/a    |
| Canal boat                      | -0.05% | -0.07% | -0.02% | -0.04% |
| Canoe\Kayak                     | 0.42%  | 0.92%  | 0.01%  | 0.36%  |
| Rowing boat                     | -0.29% | -0.04% | -0.01% | -0.07% |
| RIBS\Inflatables or sportsboats | -0.10% | -0.24% | 0.01%  | -0.09% |
| Windsurfer                      | -0.30% | 0.12%  | 0.02%  | -0.02% |
| Personal watercraft             | -0.24% | 0.13%  | 0.02%  | 0.00%  |

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 56 Number of UK Households Owning a Boat by SEG

| Number of households owning a boat |           |           |            |                   |
|------------------------------------|-----------|-----------|------------|-------------------|
|                                    | AB        | C1        | C2DE       | All UK households |
| Any boat                           | 290,975   | 252,334   | 177,838    | 680,835           |
| Small sailing boat                 | 81,879    | 35,648    | 30,538     | 134,056           |
| Sailing yacht                      | 29,000    | 23,114    | 11,360     | 58,648            |
| Power Boat                         | 15,618    | 20,234    | 18,897     | 53,797            |
| Motor boat (Day or Other)          | 29,707    | 26,172    | 35,457     | 89,386            |
| Day Motor boat                     | 16,183    | 19,622    | 19,625     | 54,441            |
| Other Motor boat                   | 13,523    | 6,551     | 15,832     | 34,945            |
| Canal boat                         | 5,326     | 1,921     | 6,260      | 13,128            |
| Canoe\Kayak                        | 117,295   | 126,406   | 48,617     | 273,344           |
| Rowing boat                        | 8,071     | 4,054     | 5,321      | 16,357            |
| RIBS\Inflatables or sportsboats    | 18,784    | 7,247     | 7,103      | 29,926            |
| Windsurfer                         | 31,100    | 29,587    | 12,907     | 68,540            |
| Personal watercraft                | 4,735     | 14,326    | 13,137     | 32,889            |
| All households                     | 6,449,100 | 7,221,000 | 11,205,000 | 24,900,000        |
| Base                               | 2,334     | 3,263     | 7,086      | 12,683            |

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

Table 57 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 57 Penetration of Boat Ownership in UK Households by Residence in ITV Region

| % of households owning a boat   |                                |                               |          |                                         |                     |                     |
|---------------------------------|--------------------------------|-------------------------------|----------|-----------------------------------------|---------------------|---------------------|
|                                 | London/<br>East/ South<br>East | Wales/<br>West/ South<br>West | Midlands | North West/<br>North East/<br>Yorkshire | Border/<br>Scotland | Northern<br>Ireland |
| Any boat                        | 3.2%                           | 3.4%                          | 2.1%     | 2.3%                                    | 3.0%                | 2.2%                |
| Small sailing boat              | 0.7%                           | 0.7%                          | 0.4%     | 0.5%                                    | 0.4%                | 0.4%                |
| Sailing yacht                   | 0.4%                           | 0.2%                          | 0.2%     | 0.1%                                    | 0.2%                | 0.0%                |
| Power Boat                      | 0.3%                           | 0.3%                          | 0.5%     | 0.1%                                    | 0.0%                | 0.0%                |
| Motor boat (Day or Other)       | 0.5%                           | 0.5%                          | 0.1%     | 0.3%                                    | 0.4%                | 0.0%                |
| Day Motor boat                  | 0.3%                           | 0.3%                          | 0.0%     | 0.2%                                    | 0.3%                | 0.0%                |
| Other Motor boat                | 0.2%                           | 0.2%                          | 0.1%     | 0.1%                                    | 0.1%                | 0.0%                |
| Canal boat                      | 0.0%                           | 0.1%                          | 0.1%     | 0.1%                                    | 0.0%                | 0.0%                |
| Canoe\Kayak                     | 1.0%                           | 1.4%                          | 0.8%     | 1.0%                                    | 1.7%                | 1.0%                |
| Rowing boat                     | 0.1%                           | 0.1%                          | 0.0%     | 0.0%                                    | 0.1%                | 0.3%                |
| RIBS\Inflatables or sportsboats | 0.1%                           | 0.2%                          | 0.0%     | 0.1%                                    | 0.1%                | 0.3%                |
| Windsurfer                      | 0.3%                           | 0.2%                          | 0.4%     | 0.2%                                    | 0.2%                | 0.0%                |
| Personal watercraft             | 0.2%                           | 0.3%                          | 0.0%     | 0.1%                                    | 0.1%                | 0.3%                |
| Base                            | 4,212                          | 1,320                         | 1,942    | 3,694                                   | 1,146               | 369                 |

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

Table 58 shows an estimate of boat owning households in the different regions. It shows that the largest number of households owning boats can be found in the London/East/South East region; this is due to the very large number of households in the London/East/South East region. There are more households owning a boat in the North West/North East region in 2009 than in the Wales/West/South West region, a reverse on the position recorded in 2008.

Table 58 Number of UK Households Owning a Boat by Residence in ITV Region

| Number of households owning a boat |                                |                               |           |                            |                     |                     |
|------------------------------------|--------------------------------|-------------------------------|-----------|----------------------------|---------------------|---------------------|
|                                    | London/<br>East/ South<br>East | Wales/<br>West/ South<br>West | Midlands  | North West/<br>North East/ | Border/<br>Scotland | Northern<br>Ireland |
| Any boat                           | 279,320                        | 110,448                       | 81,440    | 137,601                    | 65,221              | 16,564              |
| Small sailing boat                 | 57,886                         | 21,826                        | 14,690    | 30,150                     | 7,959               | 2,946               |
| Sailing yacht                      | 33,728                         | 5,605                         | 7,686     | 8,387                      | 3,995               | -                   |
| Power Boat                         | 22,669                         | 10,900                        | 17,866    | 5,350                      | -                   | -                   |
| Motor boat (Day or Other)          | 43,875                         | 16,600                        | 2,466     | 19,544                     | 8,051               | -                   |
| Day Motor boat                     | 25,939                         | 9,765                         | -         | 12,428                     | 6,703               | -                   |
| Other Motor boat                   | 17,937                         | 6,835                         | 2,466     | 7,117                      | 1,348               | -                   |
| Canal boat                         | 1,974                          | 4,580                         | 3,617     | 3,599                      | -                   | -                   |
| Canoe\Kayak                        | 90,327                         | 45,947                        | 33,135    | 61,429                     | 37,899              | 7,112               |
| Rowing boat                        | 7,960                          | 3,361                         | -         | 1,627                      | 2,014               | 2,134               |
| RIBS\Inflatables or sportsboats    | 12,104                         | 6,261                         | 1,395     | 7,102                      | 1,612               | 1,988               |
| Windsurfer                         | 29,542                         | 5,757                         | 15,114    | 14,406                     | 3,626               | -                   |
| Personal watercraft                | 15,383                         | 10,596                        | -         | 4,893                      | 1,676               | 2,384               |
| All households                     | 8,710,450                      | 3,292,372                     | 3,905,366 | 6,050,846                  | 2,194,915           | 746,052             |
| Base                               | 4,212                          | 1,320                         | 1,942     | 3,694                      | 1,146               | 369                 |

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

## Boats owned in the UK and abroad

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

Table 59 shows that the highest number of boats owned are for windsurfers at an average of 1.73 per household and personal watercraft at an average of 1.74 per household. In 2008 these were 1.47 and 1.19 respectively. However, both of these have low base sizes which need to be taken into account. Canoes/kayaks, which showed the highest average number of boats owned in 2008 show the third highest average number of boats owned with 1.64 boats per household.

Table 59 Average Number of Boats Owned in Boat Owning UK Households

|                                 | 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                                               | 1.26                                   | 0.09                                | 311  |
| Small sailing boat              | 1.16                                               | 1.14                                   | 0.02                                | 66   |
| Sailing yacht                   | 1.03                                               | 0.91                                   | 0.12                                | 30   |
| Power Boat                      | 1.07                                               | 0.94                                   | 0.13                                | 25   |
| Motor boat (Day or Other)       | 1.10                                               | 1.00                                   | 0.11                                | 42   |
| Day Motor boat                  | 1.08                                               | 0.99                                   | 0.09                                | 24   |
| Other Motor boat                | 1.13                                               | 1.01                                   | 0.13                                | 18   |
| Canal boat                      | 1.00                                               | 1.00                                   | -                                   | 7    |
| Canoe\Kayak                     | 1.64                                               | 1.61                                   | 0.02                                | 119  |
| Rowing boat                     | 1.00                                               | 0.78                                   | 0.22                                | 8    |
| RIBS\Inflatables or sportsboats | 1.12                                               | 0.97                                   | 0.15                                | 15   |
| Windsurfer                      | 1.73                                               | 1.56                                   | 0.17                                | 30   |
| Personal watercraft             | 1.74                                               | 1.22                                   | 0.53                                | 14   |

Caution: very low base sizes

Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents owning a boat)

The vast majority of boats, 93%, are kept in the UK. This is the same as the figure in 2008. Personal watercraft shows the highest proportion of boats that are kept abroad with 30% (26% in 2008). Canal boats are exclusively kept in the UK. This was also the case in 2008. All this can be seen in Table 61. NB as the base sizes are very small for some boat types below is a combined table for the last two years to provide more robust data by boat type e.g. for rowing boats.

Table 60 Proportion of Boats Owned That Are Kept in the UK and Abroad

|                                 | % of boats kept in the UK | % of boats kept abroad | Base |
|---------------------------------|---------------------------|------------------------|------|
| Anyboat                         | 93%                       | 7%                     | 311  |
| Small sailing boat              | 99%                       | 1%                     | 66   |
| Sailing yacht                   | 88%                       | 12%                    | 30   |
| Power Boat                      | 88%                       | 12%                    | 25   |
| Motor boat (Day or Other)       | 90%                       | 10%                    | 42   |
| Day Motor boat                  | 92%                       | 8%                     | 24   |
| Other Motor boat                | 89%                       | 11%                    | 18   |
| Canal boat                      | 100%                      | 0%                     | 7    |
| Canoe\Kayak                     | 98%                       | 2%                     | 119  |
| Rowing boat                     | 78%                       | 22%                    | 8    |
| RIBS\Inflatables or sportsboats | 87%                       | 13%                    | 15   |
| Windsurfer                      | 90%                       | 10%                    | 30   |
| Personal watercraft             | 70%                       | 30%                    | 14   |

Caution: very low base sizes

Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents owning a boat)

Table 61 Proportion of Boats Owned That Are Kept in the UK and Abroad 2008 and 2009

|                                 | % of boats kept in the UK | % of boats kept abroad | Base |
|---------------------------------|---------------------------|------------------------|------|
| Any boat                        | 93%                       | 7%                     | 588  |
| Small sailing boat              | 96%                       | 4%                     | 126  |
| Sailing yacht                   | 89%                       | 11%                    | 63   |
| Power Boat                      | 91%                       | 9%                     | 56   |
| Motor boat (Day or Other)       | 92%                       | 8%                     | 82   |
| Day Motor boat                  | 92%                       | 8%                     | 24   |
| Other Motor boat                | 89%                       | 11%                    | 18   |
| Canal boat                      | 100%                      | 0%                     | 20   |
| Canoe\Kayak                     | 97%                       | 3%                     | 200  |
| Rowing boat                     | 92%                       | 8%                     | 23   |
| RIBs\Inflatables or sportsboats | 87%                       | 13%                    | 38   |
| Windsurfer                      | 92%                       | 8%                     | 60   |
| Personal watercraft             | 72%                       | 28%                    | 29   |

## Number of boats owned overall

Using the estimated number of households owning each of the different types of boats as established in Table 51 and the average number of boats owned as shown in

Table 59 we can calculate an estimated number of boats owned by households in the UK which are kept in the UK and the number of boats owned by UK households which are kept abroad.

For example, based on our estimate that there are around 273,344 households in the UK owning a canoe/ kayak and the average number of canoe/ kayaks owned in these households is 1.64 on average, the total number of canoes/ kayaks owned by UK households is 448,248. Of these, 485,686 are kept in the UK and only 6,736 are kept abroad.

Table 62 Number of Boats Owned in UK and Abroad by UK Households

|                                 | 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                       | 1,099,444                                 | 1,037,878                      | 61,566                            | 680,835                          |
| Small sailing boat              | 155,122                                   | 152,859                        | 2,262                             | 134,056                          |
| Sailing yacht                   | 60,287                                    | 53,205                         | 7,081                             | 58,648                           |
| Power Boat                      | 57,508                                    | 50,615                         | 6,893                             | 53,797                           |
| Motor boat (Day or Other)       | 98,463                                    | 89,009                         | 9,454                             | 89,386                           |
| Day Motor boat                  | 58,833                                    | 53,869                         | 4,964                             | 54,441                           |
| Other Motor boat                | 39,630                                    | 35,140                         | 4,490                             | 34,945                           |
| Canal boat                      | 13,128                                    | 13,128                         | -                                 | 13,128                           |
| Canoe\Kayak                     | 448,208                                   | 441,412                        | 6,796                             | 273,344                          |
| Rowing boat                     | 16,357                                    | 12,684                         | 3,673                             | 16,357                           |
| RIBS\Inflatables or sportsboats | 33,637                                    | 29,143                         | 4,494                             | 29,926                           |
| Windsurfer                      | 118,272                                   | 106,813                        | 11,459                            | 68,540                           |
| Personal watercraft             | 57,374                                    | 39,980                         | 17,394                            | 32,889                           |

Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents owning a boat)

Table 63 compares the number of boats owned in 2007, 2008 and 2009. Seven of the boat types show a drop in 2009 compared to 2008, three show an increase. The number of canal boats shows a continuing decline, as do rowing boats. Personal watercraft numbers have returned to the level seen in 2007 after a drop in 2008.

Table 63 Number of Boats Owned by UK Households in 2007-2009

|                                 | 2009                                      |                                  | 2008                                      |                                  | 2007                                      |                                  |
|---------------------------------|-------------------------------------------|----------------------------------|-------------------------------------------|----------------------------------|-------------------------------------------|----------------------------------|
|                                 | 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                       | 1,099,444                                 | 680,835                          | 952,934                                   | 614,083                          | 1,169,482                                 | 703,923                          |
| Small sailing boat              | 155,122                                   | 134,056                          | 157,843                                   | 133,362                          | 249,217                                   | 199,265                          |
| Sailing yacht                   | 60,287                                    | 58,648                           | 69,844                                    | 69,844                           | 80,645                                    | 69,210                           |
| Power Boat                      | 57,508                                    | 53,797                           | 73,966                                    | 69,494                           | 68,717                                    | 61,916                           |
| Motor boat (Day or Other)       | 98,463                                    | 89,386                           | 99,713                                    | 89,350                           | 116,785                                   | 107,277                          |
| Day Motor boat                  | 58,833                                    | 54,441                           | n/a                                       | n/a                              | n/a                                       | n/a                              |
| Other Motor boat                | 39,630                                    | 34,945                           | n/a                                       | n/a                              | n/a                                       | n/a                              |
| Canal boat                      | 13,128                                    | 13,128                           | 23,102                                    | 23,102                           | 31,294                                    | 31,294                           |
| Canoe\Kayak                     | 448,208                                   | 273,344                          | 292,637                                   | 182,949                          | 310,606                                   | 182,162                          |
| Rowing boat                     | 16,357                                    | 16,357                           | 38,251                                    | 34,630                           | 49,203                                    | 44,806                           |
| RIBS\Inflatables or sportsboats | 33,637                                    | 29,926                           | 51,213                                    | 51,213                           | 61,040                                    | 51,176                           |
| Windsurfer                      | 118,272                                   | 68,540                           | 106,851                                   | 72,543                           | 143,675                                   | 73,439                           |
| Personal watercraft             | 57,374                                    | 32,889                           | 39,515                                    | 33,090                           | 58,301                                    | 45,201                           |

Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents owning a boat)

Table 64 is a summary of the total number of boats owned by UK households, grouped into boating categories. In total, there are over just under 1.1 million boats owned by UK households and about 1 million are kept in the UK.

Table 64 Estimate of Total Number of Boats Owned by UK Households

|               | Average number of boats owned by households | Average number of boats kept in the UK | Average number of boats kept abroad | Number of boat owning households |
|---------------|---------------------------------------------|----------------------------------------|-------------------------------------|----------------------------------|
| All boats     | 1,099,444                                   | 1,037,878                              | 61,566                              | 680,835                          |
| Sailing Boats | 249,045                                     | 235,207                                | 13,838                              | 262,002                          |
| Motor Boats   | 389,063                                     | 348,130                                | 40,932                              | 156,311                          |
| Manual Craft  | 461,336                                     | 454,541                                | 6,796                               | 318,530                          |

Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents owning a boat)



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