



British Marine Federation



Maritime and Coastguard Agency



Lifeboats



Marine Management Organisation

Watersports Participation Survey

Executive Summary



Introduction

The research has been continuously conducted by Arkenford since 2002 with BMF and RYA our original partners, MCA and RNLI joining in 2005 and BCU and MMO joining in more recent years. Over the years there have been several changes to the sample and boating and watersport activities surveyed, details of which are provided below.

The Survey

The 2013 results enable us to give an insight into trends by activity over a 12 year period for the 12 'Any boating activities' and for trends for the additional 9 activities surveyed between 2004 and 2009 and again in 2011, 2012 and 2013.

The data on which the 2005 - 2013 analyses have been based/ come from a nationally representative sample of around 12,000 respondents across the United Kingdom (England, Scotland, Wales and Northern Ireland) via omnibus. 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.

In 2011, in addition to the omnibus survey a bespoke online survey was introduced to ask more detailed questions of a representative sample of watersports participants. In 2013 the sample for this survey was 2,642.

This survey is only possible with the face to face omnibus as the results of the omnibus are used to correctly weight the profile of participants in each of the individual watersport activities.

The Questions

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

To make sure the respondents are understanding what is meant by the terms used, the following definitions are provided to them:

- small sail boats are dinghies, open keelboats and multihulls (not including seaside inflatables) which tend to be brought ashore after use.
- yachts are usually left in the water, have cooking facilities and a cabin for sleeping on board.
- power boating is defined as fast craft that plane over water whilst motor boating / cruising is defined as river boating or coastal motor cruising

Relevant respondents are then asked more detailed questions on each sport they participate in.

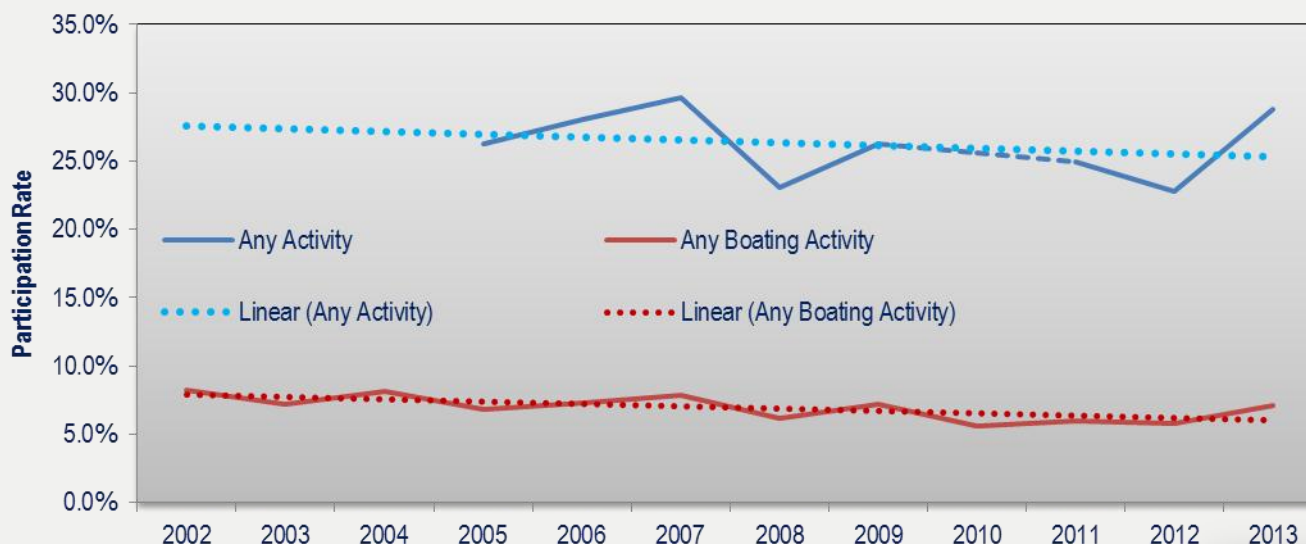
Glossary

- Any Boating Activity: covers the 12 core activities measured since 2002:
 - Small sail boat racing
 - Other small sail boat activities
 - Yacht racing
 - Yacht cruising
 - Power boating
 - General motor boating/cruising
 - Canal boating
 - Canoeing
 - Rowing/Skulling
 - Windsurfing
 - Water skiing & wakeboarding
 - Using personal watercraft
- Any watersports activity: covers the 12 core activities to the left plus the additional watersport activities that have been included during various years since 2004:
 - Surfboarding/ Body boarding/ Paddle boarding
 - Kitesurfing
 - Angling
 - Cliff climbing activities
 - Coastal walking activities
 - Spending general leisure time at the beach
 - Outdoor Swimming
 - Leisure sub-aqua diving (open water - from the shore or boat)
 - Coasteering

Headlines

- Participation in any of the activities measured is at its highest level since 2007, after seeing a decline since 2009 from 26.3% to 22.7% in 2012, 2013 has shown a 6.1% point increase. The best estimates for participation is 14.1m adults but this could range between 13.8m and 14.4m
- Participation in any of the core boating activities has also seen an increase in 2013, up 1.3% points after staying between 5.5%-6% for the previous three years. The trend has shown a relative decline over the study period but the last 3-4 years show a more constant rate indicating a levelling out. In terms of volume this puts the best estimates for participation at 3.5m adults, with a range between 3.4m and 3.7m.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Any Activity				26.3%	28.0%	29.6%	23.0%	26.3%		25.0%	22.7%	28.8%
Volume (000s)				12,580	13,506	14,400	11,294	12,893		12,589	11,153	14,124
Any Boating Activity	8.2%	7.2%	8.1%	6.8%	7.3%	7.8%	6.2%	7.2%	5.6%	5.9%	5.8%	7.1%
Volume (000s)	3,819	3,222	3,740	3,276	3,494	3,811	3,040	3,534	2,752	2,996	2,837	3,491



- The warmest summer in six years is likely to have a large impact on the increase in the participation rate across most activities
 - An improving economic picture and the Olympic legacy are also likely to be contributing factors to the increase in participation
- This years participation rate for 'any boating activity' is 7.1 % (3.5m people)
- Canoeing/ kayak participation is at an all time high with a participation rate of 3%
 - This influences the 'any boating activity' category because of sheer volume of participants (nearly 1.5 million)
- Leisure time at the beach is at an all time high with a participation rate of 16.9% across the UK
 - This is the main contributing factor in the large rise in the 'any activity' participation rate as the volume of participants has increased from 6.1 million in 2012 to 8.3 million in 2013
- Although participation rates have increased, the number of boating events taking place (16.6m) has remained at a similar level to last year
- There has been an increase in 'casual' participants in boating activities (less than 6 times) but a decrease in the more regular participants. Those participating less than 6 times now make up 82% of participants (the highest figure in the study period) – 73% of those participating in 'any boating activity' 2-5 times are doing the individual sport less than 2 times in the year
- Female participation in 'any boating activity' continues a steady increase since 2010 (volume of participants are now up 40% on that year)
- Participation by the older age group (55+) in 'any boating activity' also continues to rise and has now increased in volume by over 50% since 2002 (over the same period the total for 'any boating participation' has fallen 8%)
- Participation rates in 'any boating activity' amongst the C1 demographic SEG are at there highest level since 2004 (9.4%)
- Participation in Northern Ireland (70%), London (27%), South East (37%) and Wales (34%) are at an all time high for 'any activity'. However, participation in the North East and East England have fallen
- In terms of boat ownership, boats/crafts owned has decreased to 721,000 in 2013 (2.7%) (from 2.8% in 2012) .
 - The biggest fall has been seen in those larger boating vessels with increases in canoes, windsurfers and inflatables or sportsboats
- The participation in 'any activity' continues to move inland with 35% now taking place away from the coast. For 'any boating activity', 49% of the activity happens at the coast

Participation 2013

	2013		
	%	(000s)	
Any Activity	28.8%	14,124	
Any Boating Activity	7.1%	3,491	
Small Sail Boat Racing	0.4%	177	
Small Sail Boat Activities	1.0%	493	
Yacht Cruising	0.7%	330	
Yacht Racing	0.2%	88	
Using Personal Watercraft	0.5%	249	
Motor Boating/Cruising	1.0%	515	
Power Boating	0.6%	290	
Canal Boating	0.7%	342	
Water skiing & Wakeboarding	0.7%	348	
Canoeing	3.0%	1,477	
Rowing/Sculling	0.8%	382	
Windsurfing	0.3%	165	
Surfboarding	1.3%	660	
Kitesurfing	0.1%	63	
Angling	2.1%	1,035	
Cliff Climbing	0.7%	364	
Coastal Walking	8.2%	4,023	
Spending general leisure time at the beach	16.9%	8,279	
Outdoor Swimming	10.5%	5,129	
Leisure Sub-Aqua Diving	0.6%	271	
Coasteering	0.3%	162	
UK Adult Population (000s)		49,044	
Unweighted Base		12,704	

- The participation rate in 2013 for 'any boating activity' is 7.1% (3.5m people)
- Canoeing/kayaking has the largest participation (3%; 1.5m people) among the activities that constitute 'any boating activity'
- 28.8% of people took part in at least one of the full list of 21 activities
 - This figure is largely driven by those spending leisure time at the beach

Participation 2012 vs 2013

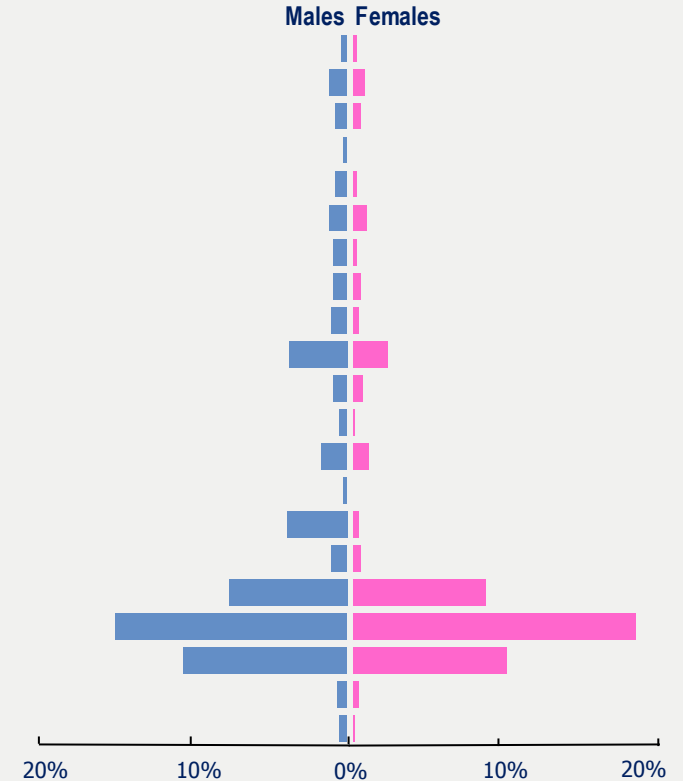
	2012		2013		% change on 2012	
	%	(000s)	%	(000s)		
Any Activity	22.7%	11,153	28.8%	14,124	↑ 6.06%	
Any Boating Activity	5.8%	2,837	7.1%	3,491	↑ 1.33%	
Small Sail Boat Racing	0.3%	166	0.4%	177	→ 0.02%	
Small Sail Boat Activities	0.8%	388	1.0%	493	↑ 0.21%	
Yacht Cruising	0.7%	329	0.7%	330	→ 0.00%	
Yacht Racing	0.2%	106	0.2%	88	→ -0.04%	
Using Personal Watercraft	0.3%	136	0.5%	249	↑ 0.23%	
Motor Boating/Cruising	0.8%	414	1.0%	515	↑ 0.20%	
Power Boating	0.6%	290	0.6%	290	→ 0.00%	
Canal Boating	0.6%	287	0.7%	342	↑ 0.11%	
Water skiing & Wakeboarding	0.4%	189	0.7%	348	↑ 0.32%	
Canoeing	2.5%	1,214	3.0%	1,477	↑ 0.54%	
Rowing/Sculling	0.4%	200	0.8%	382	↑ 0.37%	
Windsurfing	0.3%	128	0.3%	165	→ 0.07%	
Surfboarding	1.2%	599	1.3%	660	↑ 0.12%	
Kitesurfing	0.1%	47	0.1%	63	→ 0.03%	
Angling	2.1%	1,022	2.1%	1,035	→ 0.03%	
Cliff Climbing	0.5%	224	0.7%	364	↑ 0.29%	
Coastal Walking	7.0%	3,430	8.2%	4,023	↑ 1.21%	
Spending general leisure time at the beach	12.3%	6,056	16.9%	8,279	↑ 4.53%	
Outdoor Swimming	7.1%	3,466	10.5%	5,129	↑ 3.39%	
Leisure Sub-Aqua Diving	0.4%	208	0.6%	271	↑ 0.13%	
Coasteering	0.2%	82	0.3%	162	↑ 0.16%	
UK Adult Population (000s)	49,051		49,044			
Unweighted Base	12,917		12,704			

- The table shows the summary of participation rates for each activity, comparing 2012 and 2013
- The majority of activities have increased participation rates on 2012, others have only changed very slightly
- The biggest increase has come from Leisure time at the beach, which has increased 4.53% points to roughly 8.3m participants
- The only fall has been in yacht racing, decreasing by 0.04% points to around 88,000 participants

Participation by gender



	Males	Females	All UK
Any Activity	29.6%	28.1%	28.8%
Volume (000s)	7,043	7,081	14,124
Any Boating Activity	8.7%	5.6%	7.1%
Volume (000s)	2,069	1,423	3,491
Small Sail Boat Racing	0.4%	0.3%	0.4%
Small Sail Boat Activities	1.2%	0.8%	1.0%
Yacht Cruising	0.8%	0.6%	0.7%
Yacht Racing	0.3%	0.0%	0.2%
Using Personal Watercraft	0.8%	0.3%	0.5%
Motor Boating/Cruising	1.2%	0.9%	1.0%
Power Boating	0.9%	0.3%	0.6%
Canal Boating	0.9%	0.5%	0.7%
Water skiing & Wakeboarding	1.0%	0.4%	0.7%
Canoeing	3.8%	2.3%	3.0%
Rowing/Sculling	0.9%	0.6%	0.8%
Windsurfing	0.5%	0.1%	0.3%
Surfboarding	1.7%	1.0%	1.3%
Kitesurfing	0.2%	0.0%	0.1%
Angling	3.9%	0.4%	2.1%
Cliff Climbing	1.0%	0.5%	0.7%
Coastal Walking	7.7%	8.7%	8.2%
Spending general leisure time at the beach	15.2%	18.5%	16.9%
Outdoor Swimming	10.8%	10.1%	10.5%
Leisure Sub-Aqua Diving	0.7%	0.4%	0.6%
Coasteering	0.5%	0.1%	0.3%
UK Adult Population (000s)	23,813	25,231	49,044
Unweighted Base	6,176	6,528	12,704



- As in 2012, males are more active than females in almost every activity
 - Coastal walking and leisure time at the beach are the only exceptions
- However, in terms of volume, females have a greater amount taking part in ‘any activity’

*Blue figures indicate the maximum row value

Participation by age group



	16-34	35-54	55+	All UK
Any Activity	32.4%	32.4%	21.1%	28.8%
Volume (000s)	5,097	5,492	3,535	14,124
Any Boating Activity	9.3%	8.3%	3.9%	7.1%
	1,467	1,367	656	3,491
Small Sail Boat Racing	0.7%	0.3%	0.1%	0.4%
Small Sail Boat Activities	1.6%	1.0%	0.4%	1.0%
Yacht Cruising	0.5%	0.7%	0.8%	0.7%
Yacht Racing	0.3%	0.2%	0.1%	0.2%
Using Personal Watercraft	0.9%	0.5%	0.2%	0.5%
Motor Boating/Cruising	0.9%	1.4%	0.9%	1.0%
Power Boating	1.0%	0.7%	0.1%	0.6%
Canal Boating	0.7%	0.7%	0.7%	0.7%
Water skiing & Wakeboarding	1.2%	0.7%	0.3%	0.7%
Canoeing	4.5%	3.6%	1.0%	3.0%
Rowing/Sculling	1.4%	0.7%	0.3%	0.8%
Windsurfing	0.6%	0.3%	0.1%	0.3%
Surfboarding	1.7%	2.2%	0.2%	1.3%
Kitesurfing	0.2%	0.1%	0.0%	0.1%
Angling	2.0%	2.4%	1.9%	2.1%
Cliff Climbing	1.3%	0.8%	0.2%	0.7%
Coastal Walking	6.6%	10.9%	7.0%	8.2%
Spending general leisure time at the beach	18.8%	19.8%	12.1%	16.9%
Outdoor Swimming	13.6%	12.9%	5.2%	10.5%
Leisure Sub-Aqua Diving	0.8%	0.8%	0.1%	0.6%
Coasteering	0.5%	0.5%	0.1%	0.3%
UK Adult Population (000s)	15,727	16,551	16,765	49,044
Unweighted Base	3,851	3,860	4,993	12,704

- Participation in most activities declines with age, those under 34 participate the most in boating activities. However, there are a few exceptions:
- Yacht cruising and Canal boating are participated in most by those over 55
- There are 6 activities where 35-54 year olds participate the most
- The following page shows each activity by the volume in each age group

*Blue figures indicate the maximum row value

Participation by SEG

AB

C1

C2DE

	AB	C1	C2DE	All UK
Any Activity	41.5%	32.9%	21.1%	28.8%
Volume (000s)	4,367	4,530	5,226	14,124
Any Boating Activity	11.7%	9.4%	3.9%	7.1%
Volume (000s)	1,233	1,297	961	3,491
Small Sail Boat Racing	0.5%	0.5%	0.2%	0.4%
Small Sail Boat Activities	1.6%	1.4%	0.5%	1.0%
Yacht Cruising	1.4%	0.8%	0.3%	0.7%
Yacht Racing	0.1%	0.3%	0.1%	0.2%
Using Personal Watercraft	0.8%	0.5%	0.4%	0.5%
Motor Boating/Cruising	1.9%	1.3%	0.6%	1.0%
Power Boating	0.8%	0.9%	0.3%	0.6%
Canal Boating	1.0%	1.2%	0.3%	0.7%
Water skiing & Wakeboarding	1.1%	1.0%	0.4%	0.7%
Canoeing	5.7%	3.9%	1.4%	3.0%
Rowing/Sculling	1.2%	1.3%	0.3%	0.8%
Windsurfing	0.8%	0.4%	0.1%	0.3%
Surfboarding	2.8%	1.8%	0.5%	1.3%
Kitesurfing	0.3%	0.1%	0.0%	0.1%
Angling	2.1%	2.0%	2.1%	2.1%
Cliff Climbing	1.3%	0.8%	0.5%	0.7%
Coastal Walking	13.9%	9.8%	4.9%	8.2%
Spending general leisure time at the beach	22.9%	18.8%	13.3%	16.9%
Outdoor Swimming	17.6%	11.7%	6.7%	10.5%
Leisure Sub-Aqua Diving	1.3%	0.6%	0.2%	0.6%
Coasteering	0.6%	0.4%	0.2%	0.3%
UK Adult Population (000s)	10,522	13,787	24,734	49,044
Unweighted Base	2,416	3,167	7,121	12,704

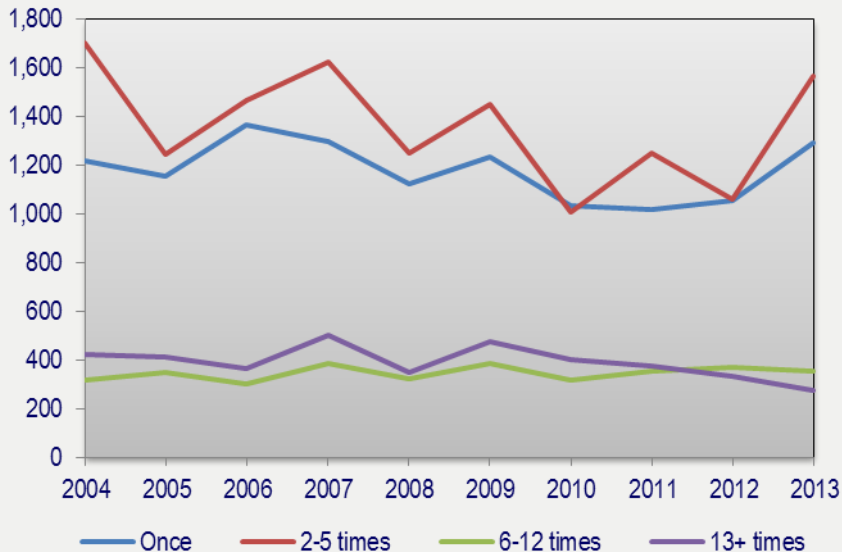
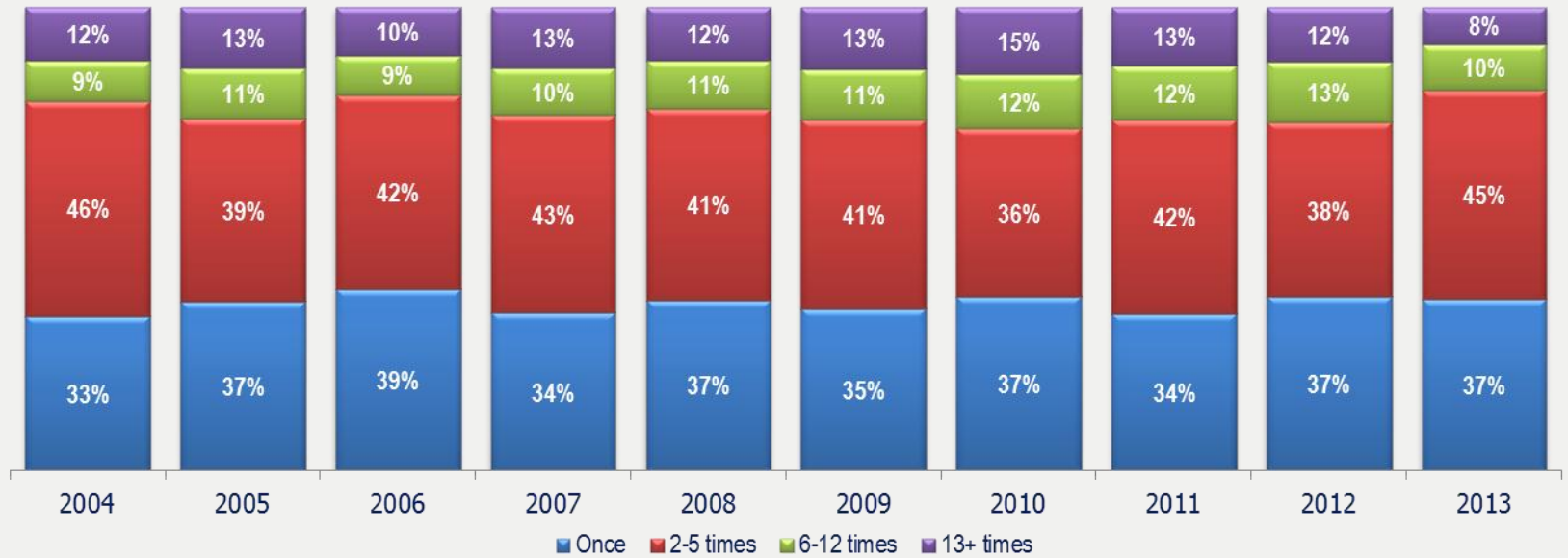
- The participation rate amongst each SEG continues to be greatest for those in the AB class.
- There are 4 activities which are greatest for the C1 SEG
- However, as the UK population is not evenly distributed, in terms of volume, participation is much more spread across the SEGs
 - C2DE has the greatest number of participants in 'any activity' but C1 has the greatest number in 'any boating activity'
- Angling, using personal watercraft and beach time have the highest volume in the C2DE SEG

*Blue figures indicate the maximum row value

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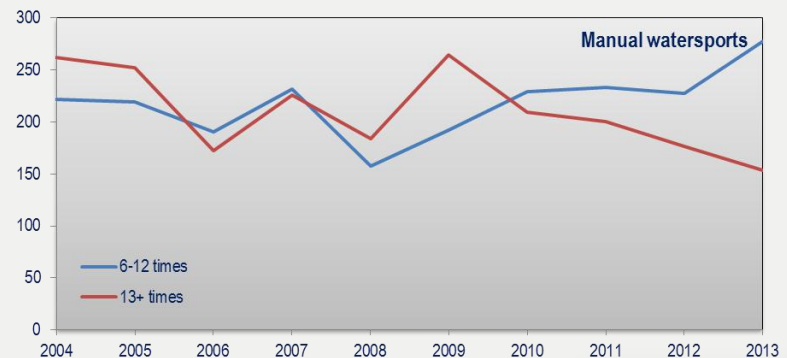
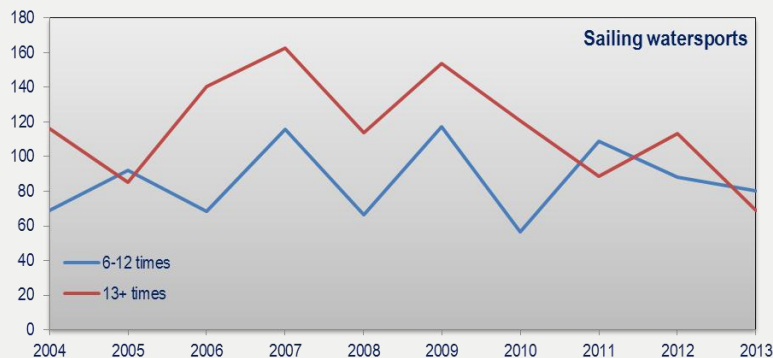
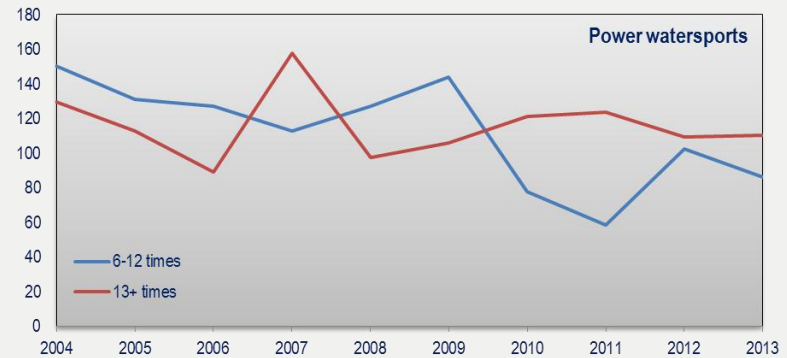
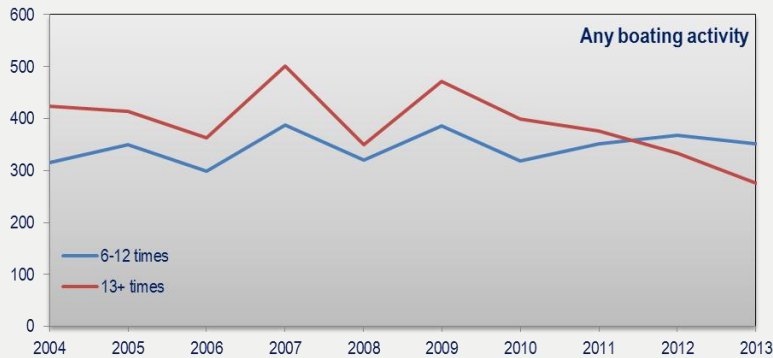
Proportion of boating participants by frequency



- The proportion of people participating in 'any boating activity' more than 6 times has fallen, however, the proportion of people who have participated in 'any boating activity' less frequently has increased
 - Increase of 7% points in those participating 2-5 times
 - Proportion has stayed constant for participants taking part once, although volume has increased greatly on 2012 figures

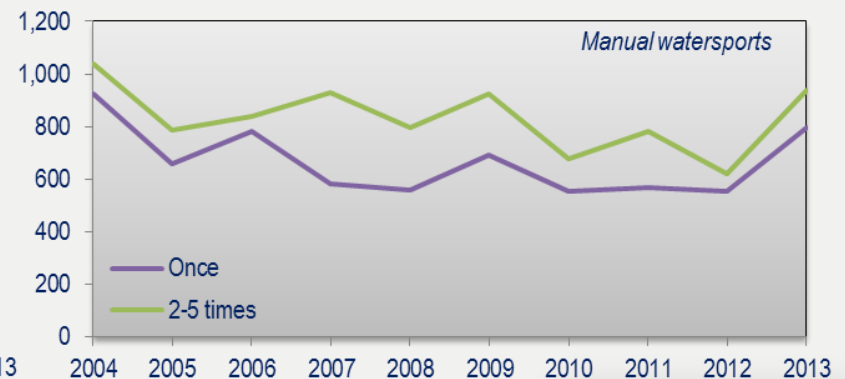
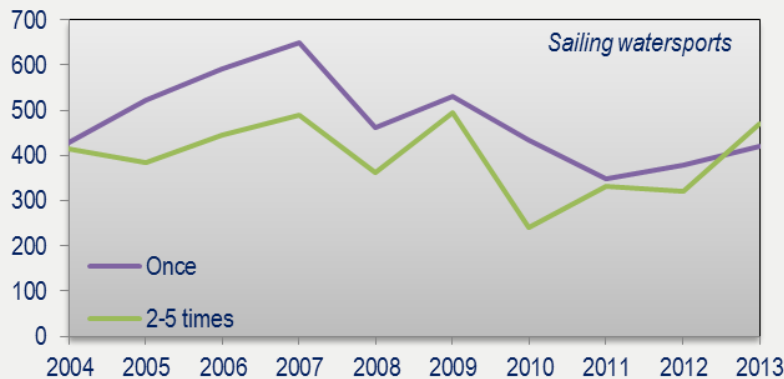
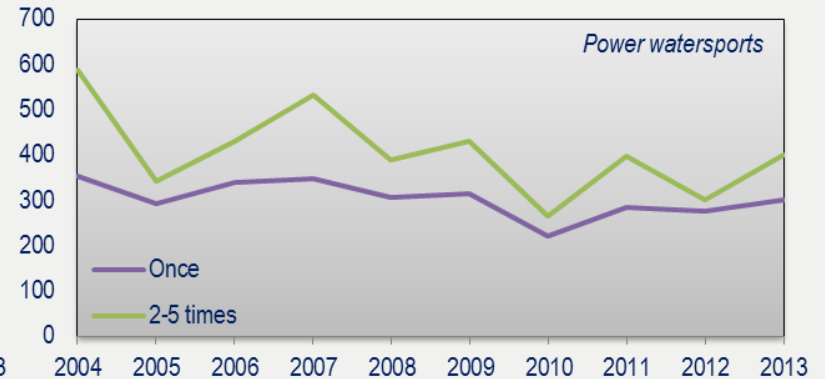
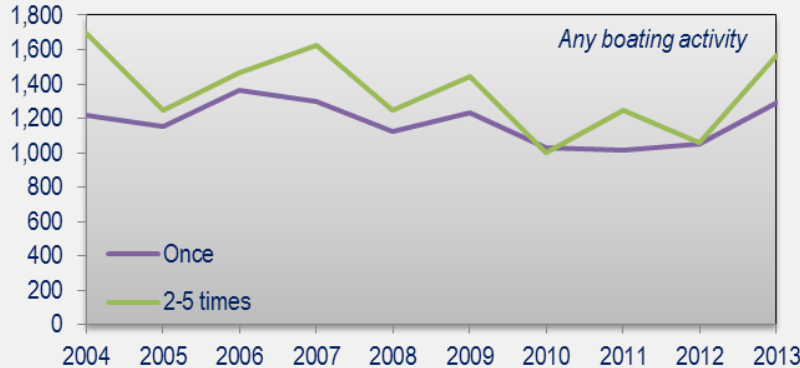
Trends in frequent boating participation

- The graphs show the volume trends of those people who participate between 6-12 times per year ('occasionals') and those who participate over 13 times ('enthusiasts')
- The majority have fallen or stayed at a similar level from 2012 figures. The exception is in manual watersports where the number of those participating 6-12 times has increased
- Enthusiasts in 'any boating activity' are at their lowest level in the study period, this could be due to the increased number of trialists and casual boating participants this year



Trends in casual boating participation

- The graphs show the volume trends of those people who participate between 2-5 times per year and those who participate once
- These 'casual' participants have increased across all the boating activities from 2012
- 73% of those in the '2-5 times' category for 'any boating activity' have participated in any individual boating activity 2 times or less



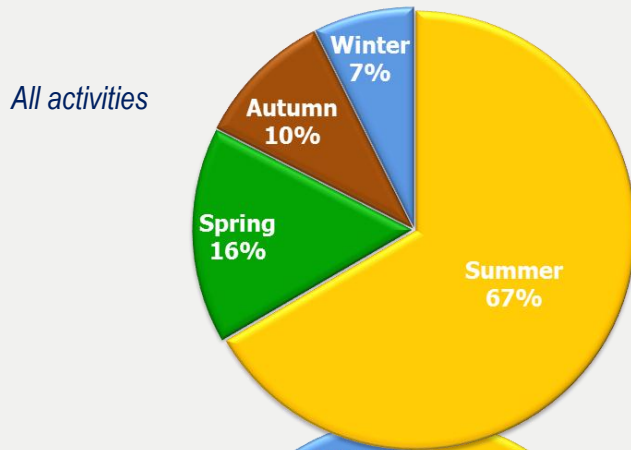
Participation by region of residence



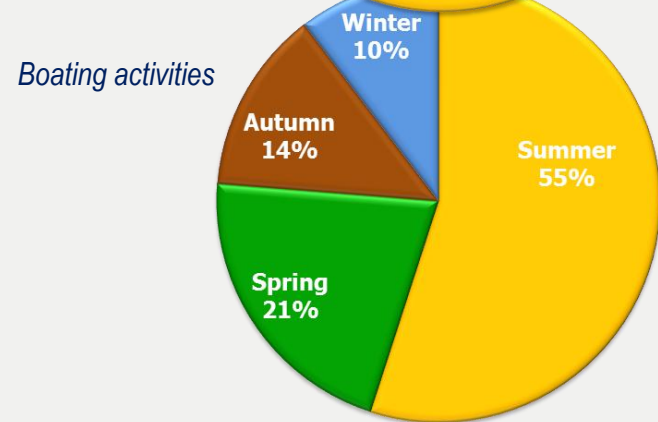
- Participation rates remain high for residents of Northern Ireland and residents of the South of England
- Residents in Scotland have the lowest participation rate in 'any activity' but this has risen from 2012
- The biggest change has been among residents in the London/South East region where participation in 'any activity' is up 11.4% points on 2012 numbers

	London/East/ South East	Wales/South West	Midlands	North West/North East/Yorkshire	Scotland	Northern Ireland
Any Activity	30.7%	34.7%	23.8%	24.9%	17.4%	69.9%
Any Boating Activity	8.0%	9.5%	6.5%	5.8%	4.5%	8.7%
Small Sail Boat Racing	0.4%	0.2%	0.3%	0.3%	0.7%	0.3%
Small Sail Boat Activities	1.2%	1.6%	0.6%	0.8%	0.9%	0.7%
Yacht Cruising	0.8%	0.6%	0.5%	0.5%	0.7%	1.3%
Yacht Racing	0.2%	0.2%	0.1%	0.2%	0.1%	0.3%
Using Personal Watercraft	0.3%	0.4%	0.6%	0.7%	0.5%	1.4%
Motor Boating/Cruising	0.9%	1.4%	1.2%	0.9%	0.9%	2.0%
Power Boating	0.5%	0.8%	0.5%	0.5%	0.4%	1.6%
Canal Boating	0.7%	1.3%	0.7%	0.6%	0.1%	0.5%
Water skiing & Wakeboarding	0.9%	0.8%	0.6%	0.5%	0.7%	0.8%
Canoeing	3.3%	4.3%	3.1%	2.3%	2.1%	2.1%
Rowing/Sculling	1.1%	0.7%	0.9%	0.6%	0.2%	0.3%
Windsurfing	0.5%	0.4%	0.3%	0.2%	0.2%	0.2%
Surfboarding	1.7%	2.4%	1.5%	0.8%	0.1%	0.8%
Kitesurfing	0.1%	0.2%	0.2%	0.0%	0.1%	0.0%
Angling	1.2%	2.8%	2.0%	2.1%	2.5%	8.3%
Cliff Climbing	0.7%	0.5%	1.0%	0.6%	0.7%	1.7%
Coastal Walking	5.9%	12.4%	6.7%	8.7%	3.0%	33.0%
Leisure time at the beach	17.5%	19.3%	13.6%	14.6%	8.8%	56.1%
Outdoor Swimming	14.1%	12.9%	8.8%	7.4%	4.8%	7.7%
Leisure Sub-Aqua Diving	0.7%	0.8%	0.3%	0.3%	0.6%	0.5%
Coasteering	0.2%	0.9%	0.5%	0.1%	0.2%	0.6%
UK Adult Population (000s)	16,936	6,481	7,482	12,390	4,193	1,562
Unweighted Base	4,344	1,698	2,003	3,187	1,071	401

Seasonal participation - overview



- The majority of participation in 'any activity' takes place in the summer months (66.6%) – 57.3% in 2012
- As previously shown, 2013 had a significantly better summer than average and with 67% of events taking place in this season it likely caused an increase in the participation rate
- Boating activities are more spread out but the majority (55%) still take place in the summer
- There are a few exceptions to this:
 - Rowing/Skulling has a higher proportion in spring than summer
 - Power boating has a more even distribution with 22% taking place in winter



Spring	March – May
Summer	June – August
Autumn	September – October
Winter	December - February

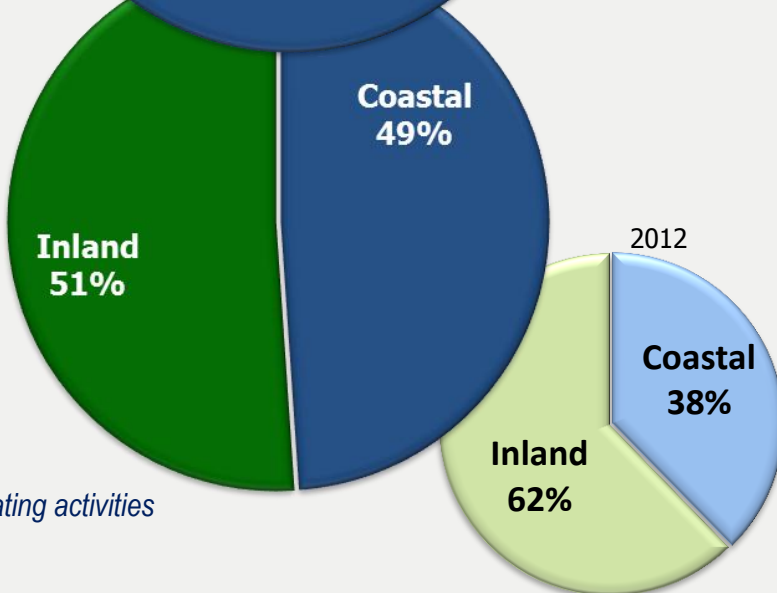
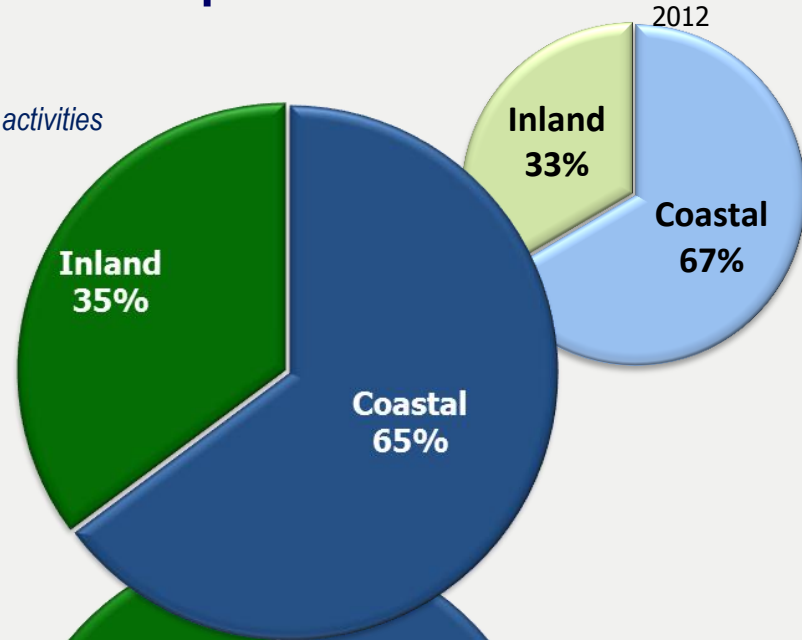
- The following table shows how activities are distributed by participation each season

Seasonal participation - detailed

	Summer		Spring		Autumn		Winter		Total	
	Number of experiences	%	Number of experiences	%	Number of experiences	%	Number of experiences	%	Number of experiences	Sample
Total all activities	93,998,318	66.6%	24,399,253	15.9%	15,938,064	10.1%	11,651,620	7.4%	145,987,254	7131
Total boating activities	9,342,701	55.0%	3,399,547	21.3%	2,241,015	13.4%	1,580,933	10.4%	16,564,197	3,632
Small sail boat activities	1,355,842	60.2%	428,892	19.0%	351,799	15.6%	117,344	5.2%	2,253,878	365
Small sail boat racing	793,084	68.4%	197,498	17.0%	117,850	10.2%	50,986	4.4%	1,159,418	218
Yacht racing	168,788	51.5%	85,386	26.0%	52,635	16.1%	21,087	6.4%	327,896	86
Yacht cruising	797,113	73.1%	181,816	16.7%	92,601	8.5%	18,838	1.7%	1,090,367	225
Using personal watercraft	242,400	54.2%	151,119	33.8%	34,676	7.8%	18,646	4.2%	446,842	227
Power boating	607,513	45.7%	199,911	15.0%	224,251	16.9%	298,399	22.4%	1,330,075	239
Motor boating/cruising	890,584	67.9%	225,753	17.2%	133,811	10.2%	61,215	4.7%	1,311,362	446
Canal boating	509,742	63.8%	159,045	19.9%	80,671	10.1%	49,053	6.1%	798,511	638
Rowing/Sculling	613,145	28.1%	666,859	30.6%	417,118	19.1%	482,021	22.1%	2,179,142	199
Canoeing/kayaking	2,496,240	60.5%	764,232	18.5%	468,199	11.3%	398,922	9.7%	4,127,593	662
Windsurfing	354,831	63.0%	149,630	26.6%	43,143	7.7%	15,583	2.8%	563,187	147
Water skiing/ Wake-boarding	513,420	52.6%	189,407	19.4%	224,261	23.0%	48,840	5.0%	975,927	180
Stand up surfing	1,444,315	93.3%	86,945	5.6%	6,005	0.4%	11,533	0.7%	1,548,798	38
Body boarding	2,146,258	74.4%	431,176	14.9%	280,562	9.7%	26,864	0.9%	2,884,860	101
Paddle boarding	182,726	96.2%	6,406	3.4%	15	0.0%	756	0.4%	189,903	37
Kitesurfing	209,079	95.3%	10,334	4.7%	0	0.0%	0	0.0%	219,413	12
Angling from a kayak	7,312	64.7%	3,976	35.2%	6	0.1%	0	0.0%	11,294	21
Angling from a boat	532,890	57.6%	203,537	22.0%	145,684	15.7%	43,601	4.7%	925,711	183
Angling from the shore	4,500,463	66.2%	887,568	13.0%	926,746	13.6%	487,711	7.2%	6,802,488	40
Cliff climbing with ropes	516,667	67.1%	23,161	3.0%	65,497	8.5%	164,339	21.4%	769,664	45
Cliff climbing without ropes	309,818	77.6%	79,816	20.0%	9,524	2.4%	0	0.0%	399,158	64
Scrambling without ropes	702,418	95.3%	25,219	3.4%	6,037	0.8%	3,679	0.5%	737,354	43
Leisure sub aqua diving from the shore	376,752	97.4%	9,917	2.6%	0	0.0%	0	0.0%	386,668	55
Leisure sub aqua diving from a boat	186,915	99.7%	545	0.3%	0	0.0%	0	0.0%	187,459	44
Coasteering	468,514	83.2%	78,806	14.0%	15,864	2.8%	0	0.0%	563,184	53
Outdoor swimming	15,664,891	86.3%	1,509,559	8.3%	654,743	3.6%	313,313	1.7%	18,142,505	847
Coastal walking as main purpose	10,043,136	47.8%	5,031,804	23.9%	3,058,896	14.6%	2,881,842	13.7%	21,015,678	290
Coastal walking as part of visit	10,597,984	58.3%	3,799,981	20.9%	2,281,118	12.6%	1,492,050	8.2%	18,171,134	351
Beachcombing	1,168,530	50.9%	447,707	19.5%	368,577	16.1%	309,000	13.5%	2,293,814	174
Leisure time at beach (going in sea)	11,247,722	81.1%	1,526,114	11.0%	713,206	5.1%	381,007	2.7%	13,868,049	460
Leisure time at beach (not going into sea)	24,349,226	60.4%	6,837,135	17.0%	5,164,569	12.8%	3,954,992	9.8%	40,305,922	641

Participation distribution - overview

All activities



Boating activities

- For 'any activity' the proportion of events taken part in at the coast was 65%, down 2% points on 2012
- For 'any boating activity' the slight majority are taking place inland but this distribution has evened out compared to 2012 where the split was 62% inland and 38% coastal (2012 was the first year the proportions were so different)
- The highest proportion of coastal activities (greater than 85%:15% split) are cliff climbing, leisure sub aqua diving from a boat, windsurfing and yacht racing
- Those activities done mainly inland (greater than 65%:35%: split) are angling from the shore, diving from the shore, rowing and canoeing
- The biggest change at the coast from 2012 was by small sail boat racing whose proportion increased 27% points.

Participation distribution - detailed

	Coastal		Inland		Coastal % change vs 2012	Sample size
	Number of experience	%	Number of experien	%		
* Total all activities	28,600,445	64.81%	15,527,546	35.19%	↓ -1.84%	4153
** Total boating activities	7,712,337	48.92%	8,053,353	51.08%	↑ 11.25%	3018
Small sail boat racing - dinghies	475,560	41.02%	683,856	58.98%	↑ 27.34%	217
Small sail boat activities - dinghies	1,385,992	61.49%	867,886	38.51%	↑ 1.45%	353
Yacht racing	289,596	88.32%	38,301	11.68%	↑ 6.19%	83
Yacht cruising	895,971	82.17%	194,396	17.83%	↓ -4.98%	211
Using personal watercraft - jet-ski/similar	348,755	78.05%	98,087	21.95%	↓ -0.73%	229
Power boating	946,921	71.19%	383,154	28.81%	↑ 10.14%	390
Motor boating/cruising	1,017,308	77.58%	294,054	22.42%	↑ 0.16%	195
Rowing/Sculling	675,458	31.00%	1,503,687	69.00%	N/A	629
Canoeing/kayaking	1,128,860	27.35%	2,998,735	72.65%	↑ 3.45%	142
Windsurfing	490,894	87.16%	72,292	12.84%	↑ 10.94%	178
Water skiing/ Wake-boarding	579,217	59.35%	396,711	40.65%	↑ 11.05%	221
Angling from a kayak	10,830	95.90%	463	4.10%		21
Angling from a boat	654,473	70.70%	271,238	29.30%	↓ -40.09%	153
Angling from the shore	1,322,519	19.44%	5,479,970	80.56%		24
Cliff climbing with ropes	720,351	93.59%	49,314	6.41%		42
Cliff climbing without ropes	382,396	95.80%	16,762	4.20%	↓ -5.31%	60
Scrambling without ropes	663,300	89.96%	74,052	10.04%		38
Leisure sub aqua diving from the shore	99,053	25.62%	287,617	74.38%	↓ -5.90%	55
Leisure sub aqua diving from a boat	186,978	99.74%	482	0.26%		40
Outdoor swimming	15,062,331	83.02%	3,080,173	16.98%	↑ 3.81%	587

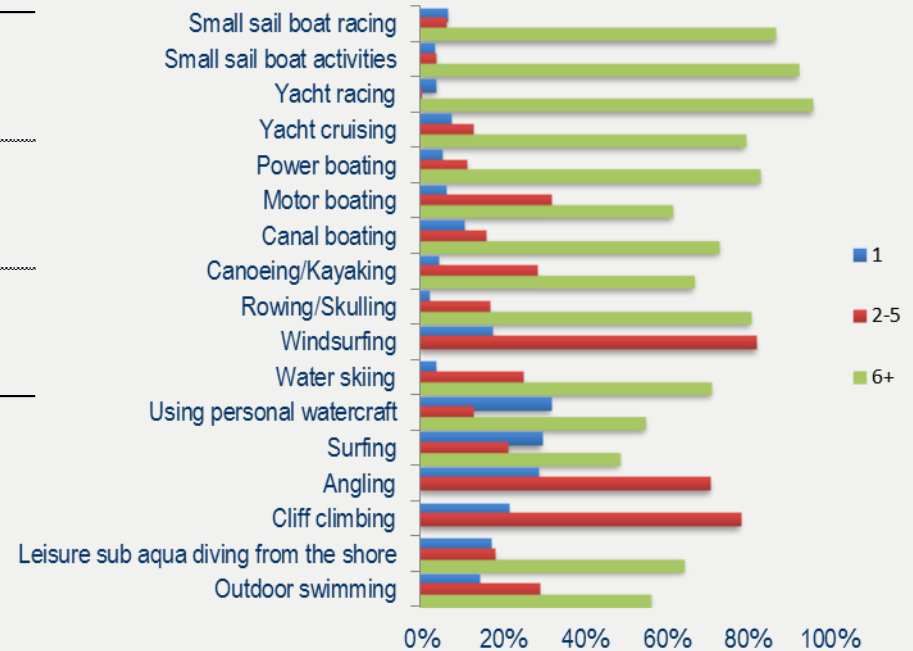
* Except coasteering, coastal walking, surfing, general time at the beach and canal boating

** Except canal boating

n.b. 2012 used grouped activity so the average of the relevant activities in 2013 have been used to compare the change where appropriate

Club or association membership

	%	Sample size
Small sail boat racing (dinghies)	27.8%	217
Small sail boat activities (dinghies)	18.8%	365
Yacht racing	21.5%	86
Yacht cruising	13.8%	225
Using Personal Watercraft (jetski or similar)	1.3%	227
Power boating	18.7%	239
Motor Boating/Cruising	8.5%	446
Canal boating	8.4%	638
Canoeing/Kayaking	10.7%	662
Rowing/Sculling	37.0%	199
Windsurfing	5.0%	147
Water Skiing & wakeboarding	12.8%	179
Surfing/bodyboarding/paddleboarding	1.9%	176
Kitesurfing	34.2%	12
Angling	5.5%	204
Cliff Climbing	1.2%	152
Coasteering	0.0%	53
Leisure sub aqua diving from the shore	18.2%	98
Outdoor Swimming	2.0%	847



- Rowing/Skulling has the highest membership with 37% of participants being a member of a club
- Apart from coasteering, the lowest proportions are from cliff climbing (1.2%) and using personal watercraft (1.3%)
- The less accessible activities tend to have the higher proportions of membership
- Those that are members of a club are much more likely to participate in an activity more than 6 times

Boat ownership by activity

	Myself	Other family member from household	Other family member outside of household	Friends	Charter/Hire - no skipper	Charter/Hire - with skipper	Charter/Hire - flotilla	Club owned	Training centre owned	Corporate owned	Other
Small sail boat racing - dinghies	42%	6%	8%	23%	4%	7%	0%	3%	6%	1%	0%
Small sail boat activities - dinghies	35%	7%	13%	28%	5%	2%	0%	4%	4%	1%	2%
Yacht racing	48%	11%	0%	32%	0%	1%	0%	4%	1%	0%	4%
Yacht cruising	9%	18%	12%	45%	3%	5%	1%	1%	0%	7%	0%
Using personal watercraft - jet-ski/similar	26%	3%	10%	27%	15%	3%	2%	5%	2%	7%	1%
Power boating	19%	4%	17%	21%	4%	20%	0%	11%	2%	2%	1%
Motor boating/cruising	13%	20%	11%	31%	12%	7%	0%	1%	2%	2%	1%
Canal boating	14%	13%	8%	22%	23%	9%	1%	5%	2%	1%	2%
Rowing/Sculling	23%	8%	3%	20%	12%	6%	1%	25%	2%	1%	0%
Canoeing/kayaking	35%	9%	5%	20%	10%	3%	1%	7%	8%	1%	2%
Windsurfing	30%	16%	1%	20%	26%	1%	2%	2%	2%	0%	0%
Water skiing/ Wake-boarding	27%	3%	13%	28%	6%	2%	4%	10%	7%	0%	0%

- For most of the boating activities, it is usually the respondent or friends or family of the respondent who own the boat/craft. This is likely to influence their views on alcohol consumption before or during the activity

UK vs. abroad ownership

- For each boat owning household the average amount owned is 1.35. Of these boats/crafts, 1.25 are kept in the UK
 - Represents 92%
- The highest proportion of boats kept overseas are power boats (23%) but in terms of volume, canoes and kayaks account for nearly 30,000

	Number of boats owned by households	Total number of boats kept in the UK	Total number of boats kept abroad	Number of boat owning households
Any boat	1,163,726	1,070,270	93,456	721,176
Small sailing boat	201,704	185,615	16,089	165,866
Sailing yacht	66,510	63,014	3,496	61,211
Power boat	52,788	40,613	12,174	45,390
Motor boat	68,066	63,583	4,483	65,324
Canal boat	37,607	34,026	3,581	36,423
Canoe/kayak	512,150	482,417	29,734	295,823
Rowing boat	42,366	36,779	5,587	36,834
RIBs/Inflatables or sportsboats	54,285	50,871	3,415	45,483
Windsurfer	86,180	78,592	7,588	54,245
Personal Watercraft	42,070	34,762	7,308	30,989

	Average number of boats per household	Average number kept in the UK	Average number kept abroad	Proportion of boats (UK and Abroad)	Base
				■ % of boats kept in the UK ■ % of boats kept abroad	
Any boat	1.35	1.25	0.10	92%	1,137
Small sailing boat	1.22	1.12	0.10	92%	258
Sailing yacht	1.09	1.03	0.06	95%	104
Power boat	1.16	0.89	0.27	77%	74
Motor boat	1.04	0.97	0.07	93%	69
Canal boat	1.03	0.93	0.10	90%	65
Canoe/kayak	1.73	1.63	0.10	94%	446
Rowing boat	1.15	1.00	0.15	87%	65
RIBs/Inflatables or sportsboats	1.19	1.12	0.08	94%	73
Windsurfer	1.59	1.45	0.14	91%	97
Personal Watercraft	1.36	1.12	0.24	83%	65

It should be noted that the sample sizes are quite small for some boating activities which could explain some variations in the data from year to year

This is the executive summary report for the Watersports Participation Survey 2013.

The full survey covers a wide range of subjects including:

- Participation in the UK and abroad
- Frequency of participation
- Geographic region of participation
- Participation by demographic breakdowns
- Boat ownership
- Seasonal participation
- Inland and coastal participation
- Average duration of participation
- Club membership
- Formal training on activity
- Safety (Drinking alcohol, wearing a lifejacket/buoyancy aid, awareness of symptoms associated with Cold Water Shock, equipment used and considerations before boating)
- Reaction to incidents whilst boating and who they required assistance from
- Sea temperature
- Factors which would increase the participation in any boating activity

Full activity profiles are provided to consortium members in a separate excel document.

The full report is available on request for affiliates of the consortium of organisations who commission the research.

Participation estimates

- A range of participation estimates are provided around our reported figures based on the 90% and 95% confidence limits to the data

	Participation rate 2013					Number of participants 2013		
	% for 2013	Min		Max		Number of participants for 2013	Min 90%	Max 90%
		95%	90%	90%	95%		Number of participants	Number of participants
Any Activity	28.8%	28.0%	28.1%	29.5%	29.6%	14,123,692	13,801,000	14,447,000
Any Boating Activity	7.1%	6.7%	6.7%	7.5%	7.6%	3,491,097	3,308,000	3,675,000
Small Sail Boat Racing	0.4%	0.3%	0.3%	0.4%	0.5%	176,921	134,000	220,000
Small Sail Boat Activities	1.0%	0.8%	0.9%	1.2%	1.2%	493,391	422,000	565,000
Yacht Cruising	0.7%	0.5%	0.6%	0.8%	0.8%	329,777	271,000	388,000
Yacht Racing	0.2%	0.1%	0.1%	0.2%	0.3%	87,830	58,000	118,000
Using Personal Watercraft	0.5%	0.4%	0.4%	0.6%	0.6%	249,450	199,000	300,000
Motor Boating/Cruising	1.0%	0.9%	0.9%	1.2%	1.2%	514,586	442,000	587,000
Power Boating	0.6%	0.5%	0.5%	0.7%	0.7%	289,522	235,000	344,000
Canal Boating	0.7%	0.6%	0.6%	0.8%	0.8%	342,309	283,000	402,000
Water skiing & Wakeboarding	0.7%	0.6%	0.6%	0.8%	0.9%	347,708	288,000	408,000
Canoeing	3.0%	2.7%	2.8%	3.3%	3.3%	1,477,208	1,355,000	1,599,000
Rowing/Sculling	0.8%	0.6%	0.7%	0.9%	0.9%	381,704	319,000	444,000
Windsurfing	0.3%	0.2%	0.3%	0.4%	0.4%	164,525	123,000	206,000
Surfboarding	1.3%	1.1%	1.2%	1.5%	1.5%	659,935	578,000	742,000
Kitesurfing	0.1%	0.1%	0.1%	0.2%	0.2%	63,399	38,000	89,000
Angling	2.1%	1.9%	1.9%	2.3%	2.4%	1,035,321	933,000	1,138,000
Cliff Climbing	0.7%	0.6%	0.6%	0.9%	0.9%	363,688	302,000	425,000
Coastal Walking	8.2%	7.7%	7.8%	8.6%	8.7%	4,023,128	3,827,000	4,219,000
Spending general leisure time at the beach	16.9%	16.2%	16.3%	17.4%	17.5%	8,278,568	8,011,000	8,546,000
Outdoor Swimming	10.5%	9.9%	10.0%	10.9%	11.0%	5,129,197	4,911,000	5,348,000
Leisure Sub-Aqua Diving	0.6%	0.4%	0.4%	0.7%	0.7%	271,341	218,000	324,000
Coasteering	0.3%	0.2%	0.2%	0.4%	0.4%	162,139	121,000	203,000
	12,704					49,043,557		

Participation by postcode area (3 year average)

Postcode Area



	South East	London	South West	East	West Midlands	East Midlands	Yorkshire	North West	North East	Wales	Scotland	Ireland	All UK
Any Activity	28.56%	21.40%	34.23%	22.86%	20.71%	22.38%	25.43%	22.29%	22.82%	30.86%	17.74%	60.75%	25.49%
Any Boating Activity	7.20%	5.07%	9.54%	7.08%	5.44%	6.55%	4.79%	5.99%	4.71%	7.22%	4.69%	10.77%	6.28%
Small Sail Boat Racing	0.53%	0.31%	0.31%	0.29%	0.32%	0.15%	0.17%	0.34%	0.17%	0.35%	0.35%	0.58%	0.33%
Small Sail Boat Activities	1.12%	0.67%	1.54%	1.05%	0.87%	0.75%	0.60%	0.86%	0.82%	0.90%	0.90%	1.42%	0.92%
Yacht Cruising	0.76%	0.67%	0.87%	1.01%	0.49%	0.84%	0.39%	0.50%	0.30%	0.41%	0.55%	0.97%	0.63%
Yacht Racing	0.24%	0.23%	0.21%	0.09%	0.18%	0.22%	0.22%	0.10%	0.22%	0.02%	0.14%	0.29%	0.19%
Using Personal Watercraft	0.32%	0.28%	0.28%	0.48%	0.28%	0.60%	0.27%	0.45%	0.58%	0.25%	0.40%	1.94%	0.40%
Motor Boating/Cruising	0.87%	0.63%	1.55%	0.63%	0.72%	1.08%	0.61%	0.88%	0.75%	1.09%	0.78%	2.25%	0.90%
Power Boating	0.47%	0.36%	0.69%	0.71%	0.52%	0.49%	0.48%	0.74%	0.57%	0.78%	0.42%	1.43%	0.56%
Canal Boating	0.65%	0.43%	1.17%	0.47%	0.69%	1.24%	0.49%	0.81%	0.27%	0.71%	0.12%	0.51%	0.63%
Water skiing & Wakeboarding	0.48%	0.69%	0.68%	0.79%	0.36%	0.57%	0.43%	0.37%	0.13%	0.44%	0.38%	1.21%	0.51%
Canoeing	3.12%	1.78%	4.48%	3.37%	2.56%	2.59%	1.73%	2.40%	1.68%	3.45%	2.07%	4.11%	2.63%
Rowing/Sculling	0.72%	0.66%	0.73%	0.77%	0.58%	0.65%	0.54%	0.55%	0.49%	0.49%	0.32%	0.48%	0.60%
Windsurfing	0.36%	0.37%	0.51%	0.36%	0.30%	0.47%	0.17%	0.26%	0.10%	0.21%	0.28%	0.41%	0.32%
Surfboarding	1.41%	1.29%	2.84%	0.85%	1.00%	1.44%	1.00%	0.81%	0.42%	1.61%	0.42%	2.08%	1.25%
*(based on 2012 data) Rafting	0.11%	0.44%	0.35%	0.00%	0.32%	0.26%	0.51%	0.64%	0.00%	0.42%	0.42%	0.88%	0.37%
Kitesurfing	0.21%	0.27%	0.10%	0.25%	0.19%	0.35%	0.07%	0.09%	0.36%	0.17%	0.15%	0.15%	0.19%
Angling	1.10%	0.53%	2.06%	1.66%	1.23%	0.88%	1.47%	1.22%	1.43%	1.77%	1.50%	6.08%	1.39%
Angling (from a boat)	0.33%	0.27%	0.40%	0.49%	0.27%	0.31%	0.31%	0.35%	0.25%	0.54%	0.48%	1.25%	0.37%
Angling (from the shore)	0.69%	0.30%	1.12%	0.94%	0.63%	0.63%	0.69%	0.58%	0.47%	0.94%	0.66%	1.07%	0.66%
Cliff Climbing	0.56%	0.53%	0.59%	0.21%	0.72%	0.77%	0.80%	0.75%	0.45%	0.72%	0.60%	2.07%	0.67%
Coastal Walking	7.38%	3.94%	14.50%	5.46%	6.26%	7.21%	8.71%	7.18%	10.17%	11.43%	5.29%	29.04%	8.15%
Spending general leisure time at the beach	16.63%	9.70%	18.02%	10.05%	10.75%	10.85%	15.02%	10.32%	13.26%	18.04%	7.71%	43.45%	13.62%
Outdoor Swimming	11.40%	10.69%	12.07%	7.81%	7.32%	8.45%	6.98%	7.19%	5.22%	9.44%	4.95%	11.75%	8.86%
Leisure Sub-Aqua Diving	0.64%	0.61%	0.65%	0.78%	0.34%	0.48%	0.37%	0.47%	0.75%	0.40%	0.53%	1.05%	0.56%
*(based on 2 year average) Coasteering	0.19%	0.16%	0.48%	0.00%	0.40%	0.31%	0.11%	0.19%	0.00%	0.68%	0.18%	0.54%	0.25%
UK Adult Population (000s)	7,682	7,799	4,149	1,588	4,641	3,052	3,052	5,746	2,219	2,475	4,242	1,481	48,126
Unweighted Base	5,644	5,875	3,258	1,243	3,695	2,409	3,495	4,520	1,695	1,977	3,307	1,156	38,274

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- Royal Yachting Association
- Maritime and Coastguard Agency
- Royal National Lifeboat Institution
- British Canoe Union
- Marine Management Organisation



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