

Arkenford
bright  minds

Watersports Participation Survey
2015
Executive Summary



Maritime and
Coastguard Agency



**BRITISH
CANOEING**



Lifeboats



Cefas

Introduction

The research has been continuously conducted by Arkenford since 2002 with BMF and RYA our original partners, MCA and RNLI joining in 2005, BCU in 2010 and most recently CEFAS joining in 2015. 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 2015 results enable us to give an insight into trends by activity over a 13 year period for the 12 'Any boating activities' and for trends for the additional activities surveyed between 2004 and 2009 and again in 2011 to 2015.

The data on which the 2005 - 2015 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 2015 the sample for this survey was 2,788.

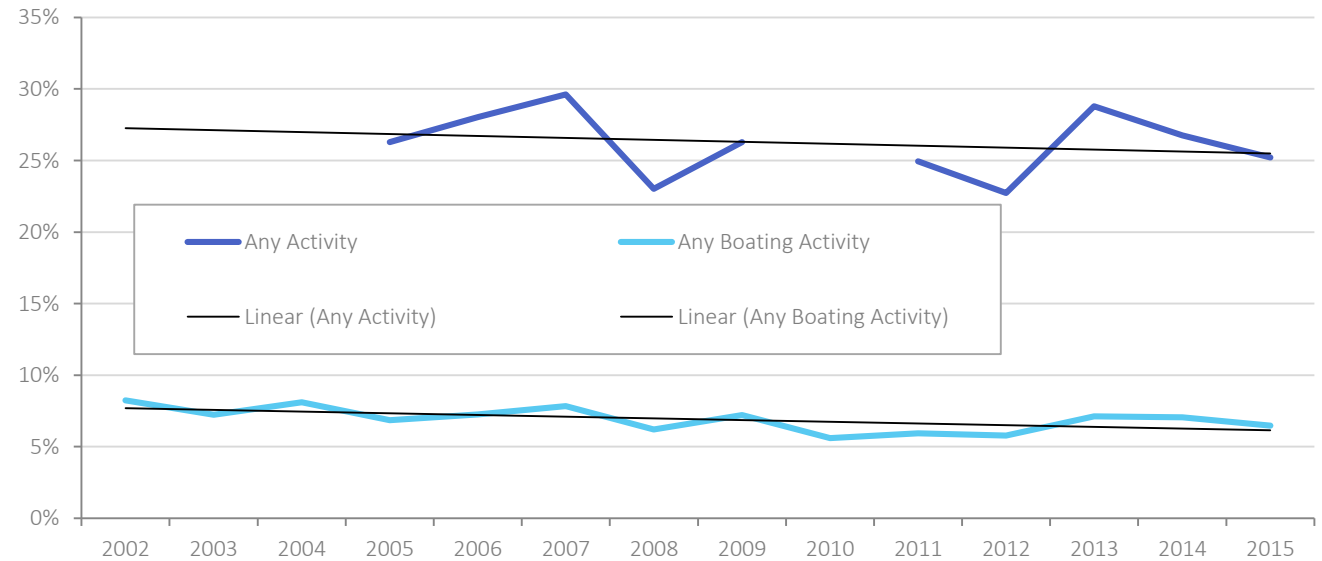
This survey is only possible with the face to face omnibus as the results of the omnibus are used to correctly weight the profile of participants in each of the individual watersport activities.

Headlines


































- Participation in ‘any activities’ continued a steady declining trend seen throughout the study period this year with a 1.6% points decline. This shows a best estimate volume of participation amongst UK adults of around 12.4m.
 - This figure still remains higher than the 2011 pre-Olympics figure.
- Participation in ‘any boating activities’ has also seen a slight drop in 2015 to 6.5% of UK adults. This represents a best estimate of 3.2m UK adult participants.
 - Although there has been a decline the number is still higher than 2010-2012 figures.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Any Activity				26.3%	28.0%	29.6%	23.0%	26.3%		25.0%	22.7%	28.8%	26.8%	25.2%
Volume (000s)				12,580	13,505	14,400	11,294	12,892		12,589	11,153	14,123	13,126	12,363
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%	7.1%	6.5%
Volume (000s)	3,819	3,221	3,740	3,276	3,494	3,810	3,039	3,534	2,751	2,995	2,836	3,491	3,459	3,175

*Orange figures indicate the maximum row value



Participation Summary

	2015		
	%	(000s)	
Any Activity	25.2%	12364	
Any Boating Activity	6.5%	3176	
Small Sail Boat Racing	0.2%	109	
Small Sail Boat Activities	0.9%	418	
Yacht Cruising	0.5%	253	
Yacht Racing	0.2%	94	
Using Personal Watercraft	0.3%	171	
Motor Boating/Cruising	0.9%	421	
Power Boating	0.6%	297	
Canal Boating	0.8%	379	
Water skiing & Wakeboarding	0.6%	273	
Canoeing	2.9%	1408	
Rowing/Sculling	0.7%	330	
Windsurfing	0.2%	109	
Surfing/bodyboarding/paddleboarding	2.0%	996	
Stand up Surfing	0.9%	465	
Body Boarding	1.1%	515	
Paddle boarding	0.4%	210	
Kitesurfing	0.1%	36	
Freshwater Angling	0.7%	335	
Sea Angling	1.4%	694	
Sea Angling (from a kayak)	0.1%	72	
Sea Angling (from a rental boat)	0.5%	229	
Sea Angling (from a charter boat)	0.1%	63	
Sea Angling (from rocks)	0.6%	284	
Sea Angling (from shore)	0.6%	304	
Recreation Sea Fishing	0.2%	104	
Cliff Climbing	0.8%	382	
Coastal Walking	9.5%	4668	
Leisure time at the beach	13.0%	6393	
Outdoor Swimming	8.7%	4278	
Leisure subaqua Diving	0.7%	350	
Coasteering	0.2%	101	
UK Adult Population (000s)	49051	49051	
Unweighted Base	12739	12739	

- The most popular activities in 2015 are the same as in previous years.
 - Leisure time at the beach, coastal walking and outdoor swimming continue to have the largest contribution to participation.
- Out of the 'any boating activities', canoeing was participated in by an estimated 1.4m UK adult residents and for 'any activities', an estimated 6.4m spent general leisure time at the beach.
- Overall the participation rate for 'any activity' in 2015 stands at 25.2%, and for 'any boating', 6.5%.

Participation Comparison

	2014		2015		% change on 2014	
	%	(000s)	%	(000s)		
Any Activity	26.8%	13127	25.2%	12364	▼	-1.6%
Any Boating Activity	7.1%	3459	6.5%	3176	▼	-0.6%
Small Sail Boat Racing	0.4%	197	0.2%	109	▼	-0.2%
Small Sail Boat Activities	1.1%	518	0.9%	418	▼	-0.2%
Yacht Cruising	0.7%	325	0.5%	253	▼	-0.1%
Yacht Racing	0.2%	106	0.2%	94	▬	0.0%
Using Personal Watercraft	0.4%	204	0.3%	171	▬	-0.1%
Motor Boating/Cruising	1.1%	522	0.9%	421	▼	-0.2%
Power Boating	0.8%	381	0.6%	297	▼	-0.2%
Canal Boating	0.8%	393	0.8%	379	▬	0.0%
Water skiing & Wakeboarding	0.7%	336	0.6%	273	▼	-0.1%
Canoeing	3.1%	1528	2.9%	1408	▼	-0.2%
Rowing/Sculling	0.8%	392	0.7%	330	▼	-0.1%
Windsurfing	0.4%	194	0.2%	109	▼	-0.2%
Surfing/bodyboarding/paddleboarding	1.4%	711	2.0%	996	▲	0.6%
Stand up Surfing	.	.	0.9%	465	.	.
Body Boarding	.	.	1.1%	515	.	.
Paddle boarding	.	.	0.4%	210	.	.
Kitesurfing	0.2%	99	0.1%	36	▼	-0.1%
Angling	2.1%	1030	.	.	.	.
Freshwater Angling	.	.	0.7%	335	.	.
Sea Angling	.	.	1.4%	694	.	.
Sea Angling (from a kayak)	.	.	0.1%	72	.	.
Sea Angling (from a rental boat)	.	.	0.5%	229	.	.
Sea Angling (from a charter boat)	.	.	0.1%	63	.	.
Sea Angling (from rocks)	.	.	0.6%	284	.	.
Sea Angling (from shore)	.	.	0.6%	304	.	.
Recreation Sea Fishing	.	.	0.2%	104	.	.
Cliff Climbing	0.9%	456	0.8%	382	▼	-0.2%
Coastal Walking	8.9%	4364	9.5%	4668	▲	0.6%
Leisure time at the beach	14.9%	7299	13.0%	6393	▼	-1.8%
Outdoor Swimming	9.3%	4577	8.7%	4278	▼	-0.6%
Leisure subaqua Diving	0.6%	305	0.7%	350	▬	0.1%
Coasteering	0.3%	125	0.2%	101	▬	0.0%
UK Adult Population (000s)	49051	49051		49051		
Unweighted Base	12320	12320		12739		

- Comparing the data from the previous 2 years we see a fall in the overall participation in 'any activity' by 1.6% points.
 - In terms of volume this is a fall by just under 1m people.
- Again this fall is driven by the decline in participation of general leisure time at the beach (decline of 1m participants) which make up a large proportion of participants
- Coastal walking has increased since last year but other activities have remained the same as the previous year or dropped.
- Surfing has seen a slight increase in its combined score but for the first time the 3 activities that make this up were asked individually, this could have caused the 0.6% point increase.

Long Term Trends by Activity

	2005		2015			% change on 2005
	%	(000s)	%	(000s)		
Any Activity	26.3%	12580	25.2%	12364	▼	-1.1%
Any Boating Activity	6.8%	3276	6.5%	3176	▼	-0.4%
Small Sail Boat Racing	0.3%	144	0.2%	109	▬	-0.1%
Small Sail Boat Activities	1.1%	538	0.9%	418	▼	-0.3%
Yacht Cruising	0.7%	315	0.5%	253	▼	-0.1%
Yacht Racing	0.2%	81	0.2%	94	▬	0.0%
Using Personal Watercraft	0.8%	374	0.3%	171	▼	-0.4%
Motor Boating/Cruising	1.2%	567	0.9%	421	▼	-0.3%
Power Boating	0.8%	362	0.6%	297	▼	-0.2%
Canal Boating	0.5%	261	0.8%	379	▲	0.2%
Water skiing & Wakeboarding	0.8%	369	0.6%	273	▼	-0.2%
Canoeing	2.1%	998	2.9%	1408	▲	0.8%
Rowing/Sculling	1.0%	472	0.7%	330	▼	-0.3%
Windsurfing	0.6%	275	0.2%	109	▼	-0.4%
Surfing/bodyboarding/paddleboarding	1.3%	601	2.0%	996	▲	0.8%
Stand up Surfing	.	.	0.9%	465	.	.
Body Boarding	.	.	1.1%	515	.	.
Paddle boarding	.	.	0.4%	210	.	.
Kitesurfing	0.2%	105	0.1%	36	▼	-0.1%
Angling	.	.	.	.	.	.
Freshwater Angling	.	.	0.7%	335	.	.
Sea Angling	.	.	1.4%	694	.	.
Sea Angling (from a kayak)	.	.	0.1%	72	.	.
Sea Angling (from a rental boat)	.	.	0.5%	229	.	.
Sea Angling (from a charter boat)	.	.	0.1%	63	.	.
Sea Angling (from rocks)	.	.	0.6%	284	.	.
Sea Angling (from shore)	.	.	0.6%	304	.	.
Recreation Sea Fishing	.	.	0.2%	104	.	.
Cliff Climbing	0.9%	449	0.8%	382	▼	-0.2%
Coastal Walking	12.2%	5815	9.5%	4668	▼	-2.6%
Leisure time at the beach	11.5%	5502	13.0%	6393	▲	1.5%
Outdoor Swimming	10.6%	5070	8.7%	4278	▼	-1.9%
Leisure subaqua Diving	1.2%	558	0.7%	350	▼	-0.5%
Coasteering	.	.	0.2%	101	.	.
UK Adult Population (000s)	47858	47858		49051		
Unweighted Base	12191	12191		12739		

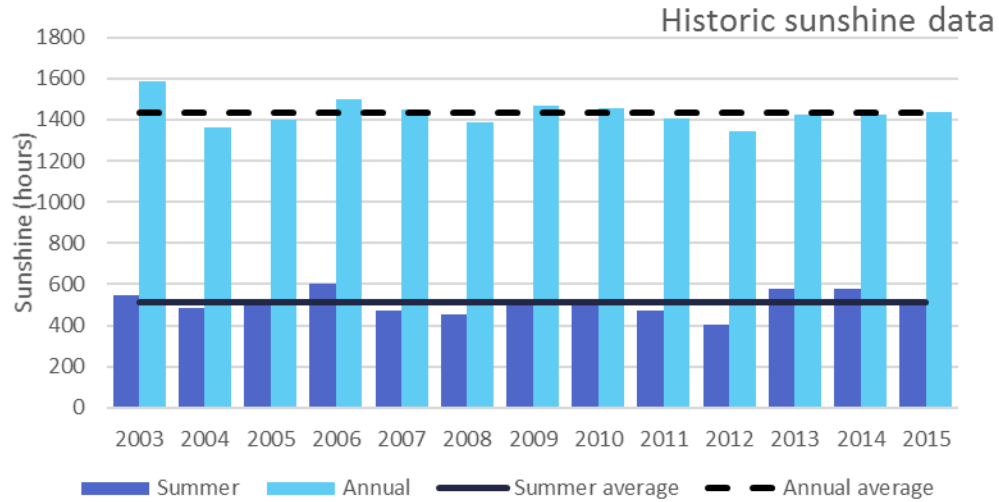
- Comparing the data in the long term, in this case, looking at the participation rates from 2005. The participation in both 'any activity' and 'any boating activity' have seen a slight decrease.
- Looking at the individual activities though we can see some shifts in the numbers. The increases are seen in canal boating which has increased by 0.2%, canoeing by 0.8%, surfing by 0.8% and leisure time at the beach by 1.5%.

Importance of the weather?

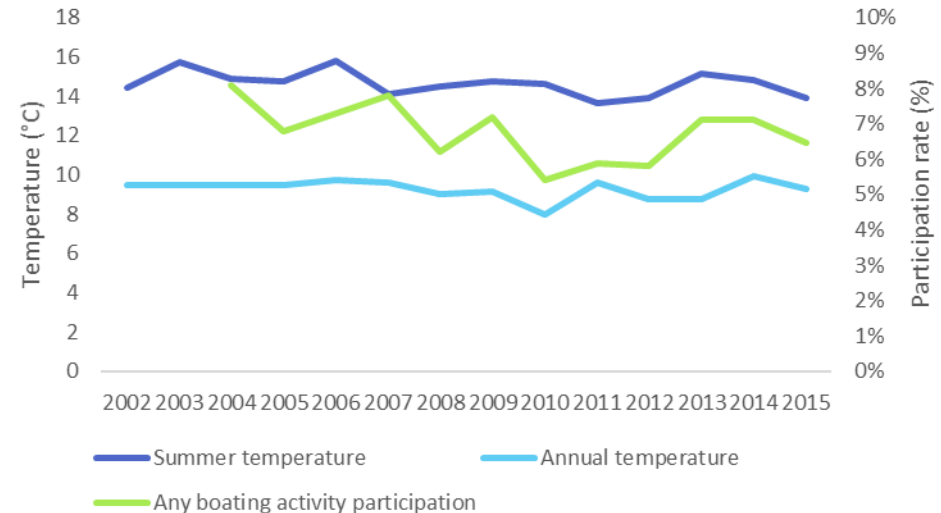
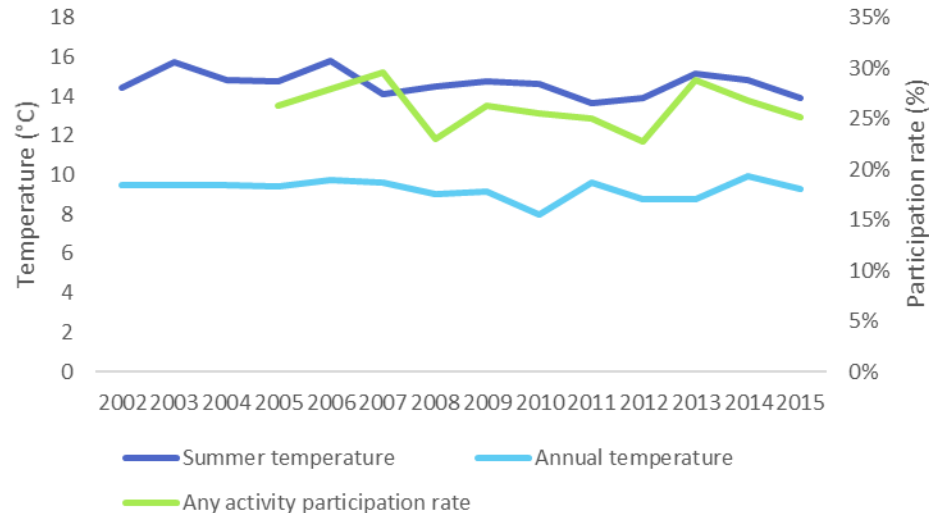


- The information presented over the next couple of slides aims to show what, if any, effect the weather has on the changing participation rates.
- The graphs above show the participation rates alongside sunshine hours.
- When looking at the graph on the left, which compares 'any activity' participation rate with the annual sunshine hours, we can see what appears to be a slight correlation. When the sunshine hours are greater, participation rates are higher. However, 2015 actually saw an increase in sunshine hours but a fall in participation.
- The 'any boating participation' graph on the right shows less correlation between the 2 data sets.

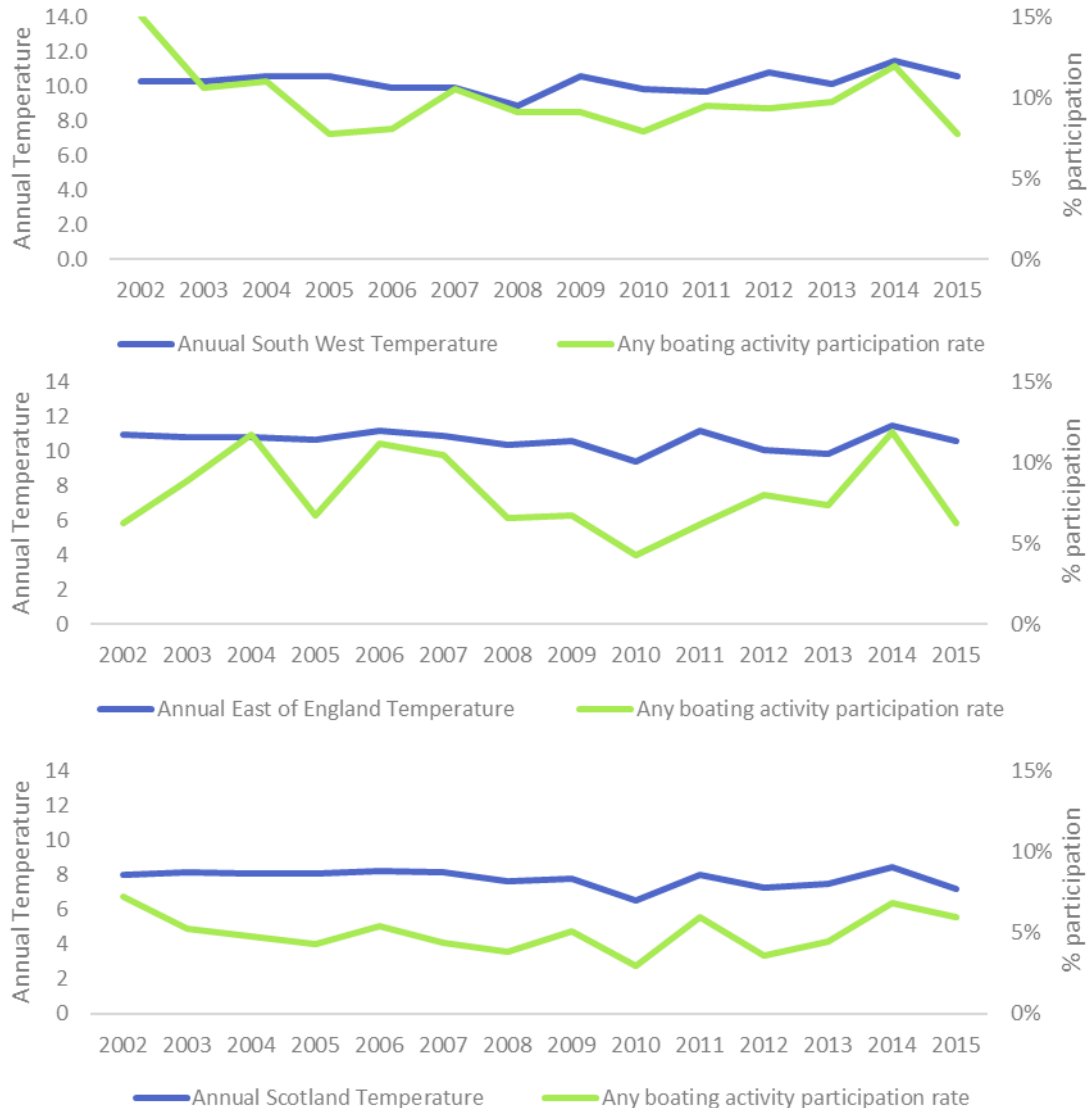
Sunshine and temperature



- This year the summer sunshine hours has dropped back down to the average level for the past 12 years.
- It should be noted that 2014 has been reported to be the hottest average year since 1910 (9.9°C), this years average temperature was 9.2 °C.
- The below charts show a decrease in summer temperature, average temperature and activity rates at around the same rates

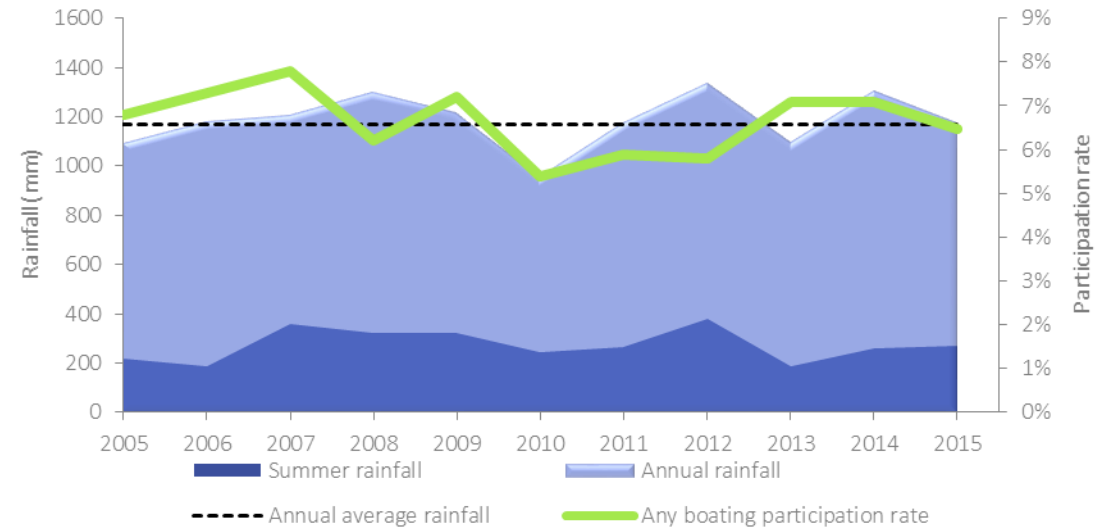
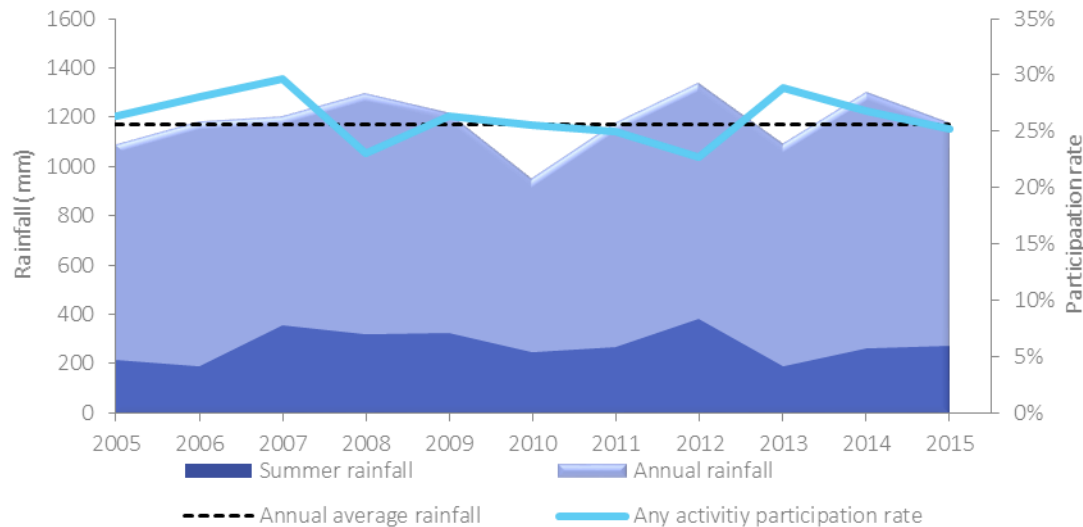


Temperature by region



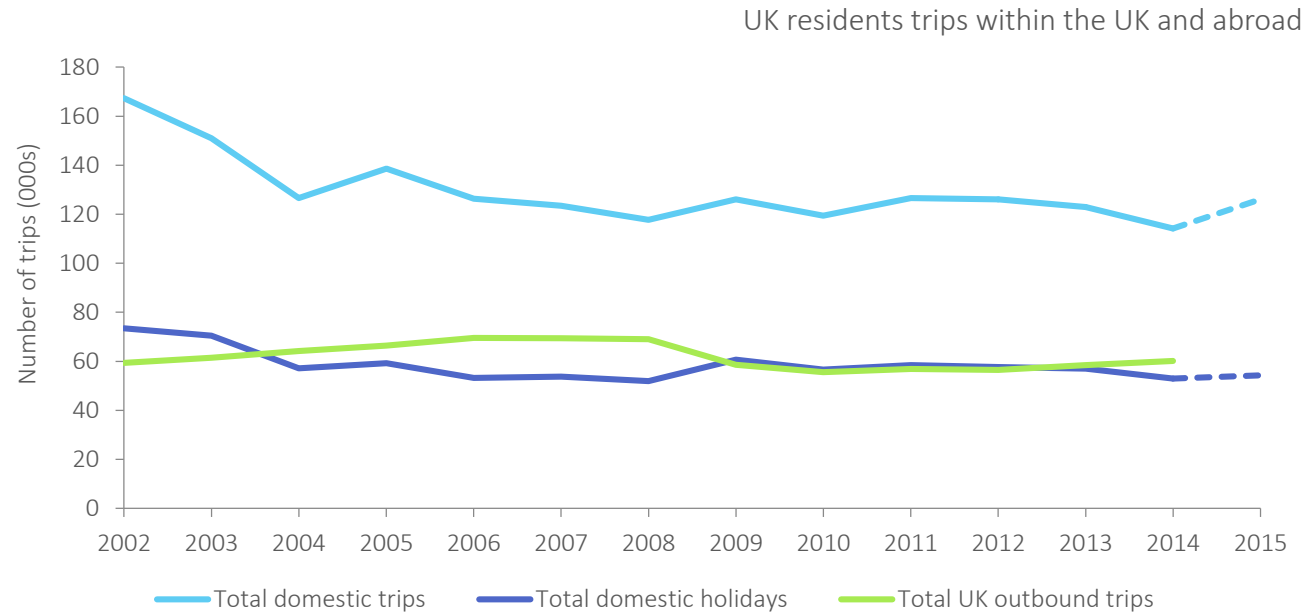
- As an example of how temperature and boating participation changes across the UK, the graphs to the left show examples from 3 different parts of the UK; the South West, Scotland and the East of England.
- The graphs show that the temperature pattern does not change across the UK but the actual temperature naturally changes from the North to the South:
 - Scotland showed an annual temperature of 7.2°C in 2015 (a 1.2°C fall on 2014).
 - The South West showed an annual temperature of 10.6°C (a 0.9°C fall on 2014)
- The graphs also show the ‘any boating’ participation figure for the respective region. These tend to follow a similar pattern of change and 2015 is no different as both trends have fallen.
 - Some regions do appear to be slightly more responsive to change because of the weather. For example the East of England shows the greatest peaks and troughs when there has been a significant temperature change, whereas Scotland appears more stable.

Rainfall



- As with previous years, we have also looked at participation rates compared with rainfall. Although 2015 was a colder year than 2014, it was also dryer. However, we always look at just the Summer months as they are the most popular period for watersports and this shows that rainfall was actually fractionally greater than 2014.
- This years results do not provide any extra defining evidence that these factors do have an impact but increasingly the evidence suggests that a combination of the factors do have an impact.
 - Different activities are likely effected in different ways, for example surfing compared with yacht racing.
 - Casual and enthusiastic participants are also likely effected differently, will rainfall put off a first timer but not a regular boat goer?

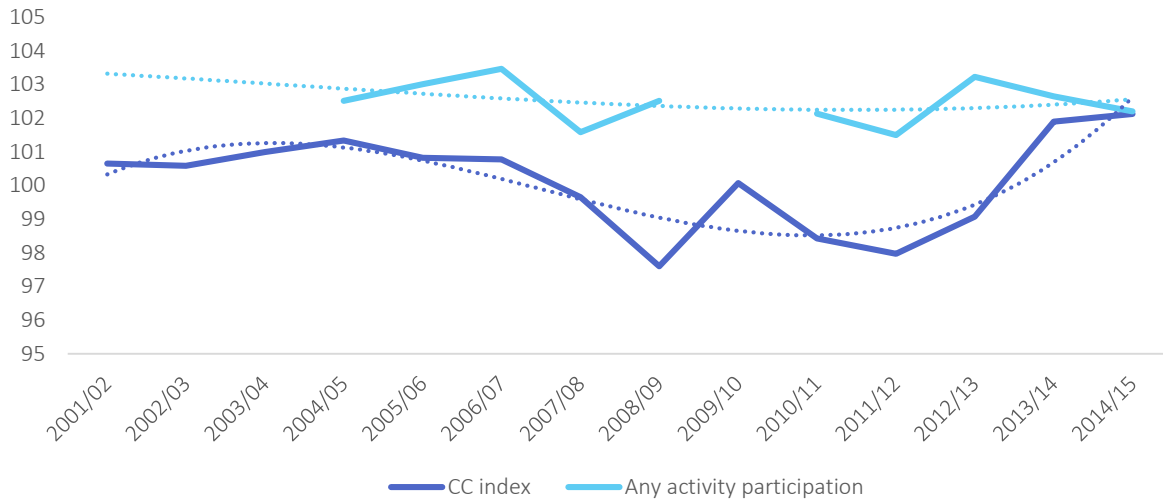
Importance of holidays?



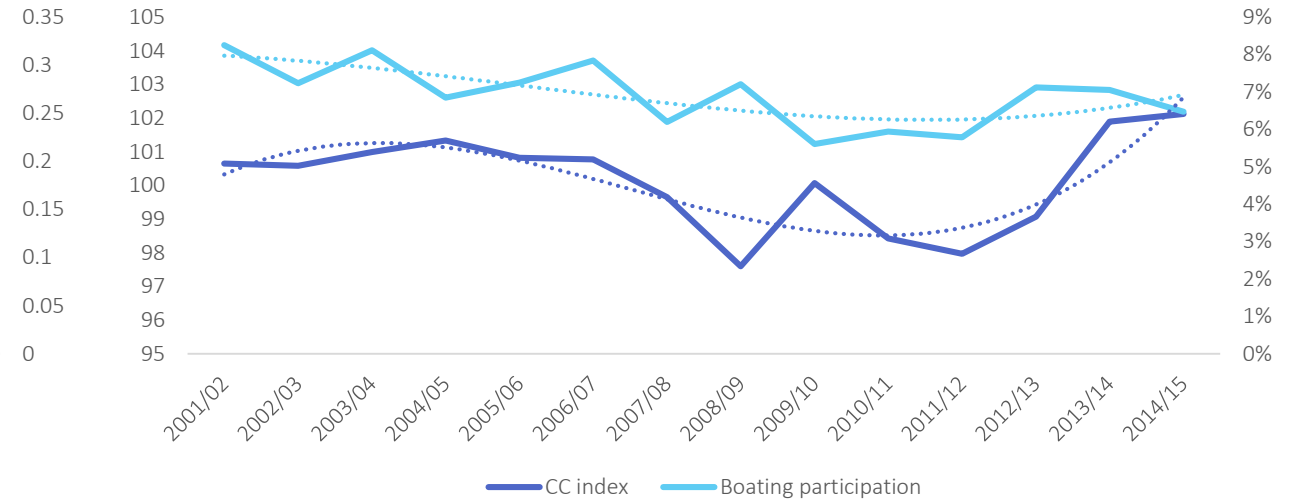
- Although 2014 saw a decline in domestic tourism, it was the end of a downward trend spanning back to 2011. The projected end of year total for domestic holidays (based on the YTD numbers) shows a 10% rise in trips.
- Domestic holidays are however projected to stay fairly similar to 2014, which is fairly consistent with the previous years.
- Overseas holidays showed a rise through 2014 with estimates suggesting this rise will continue through 2015. However, the type of holiday people are taking is shifting with more variety appearing to be the trend. As a result city breaks are now the most popular holiday type, overtaking traditional beach holidays.

Consumer Confidence

Consumer Confidence Index vs any activity participation

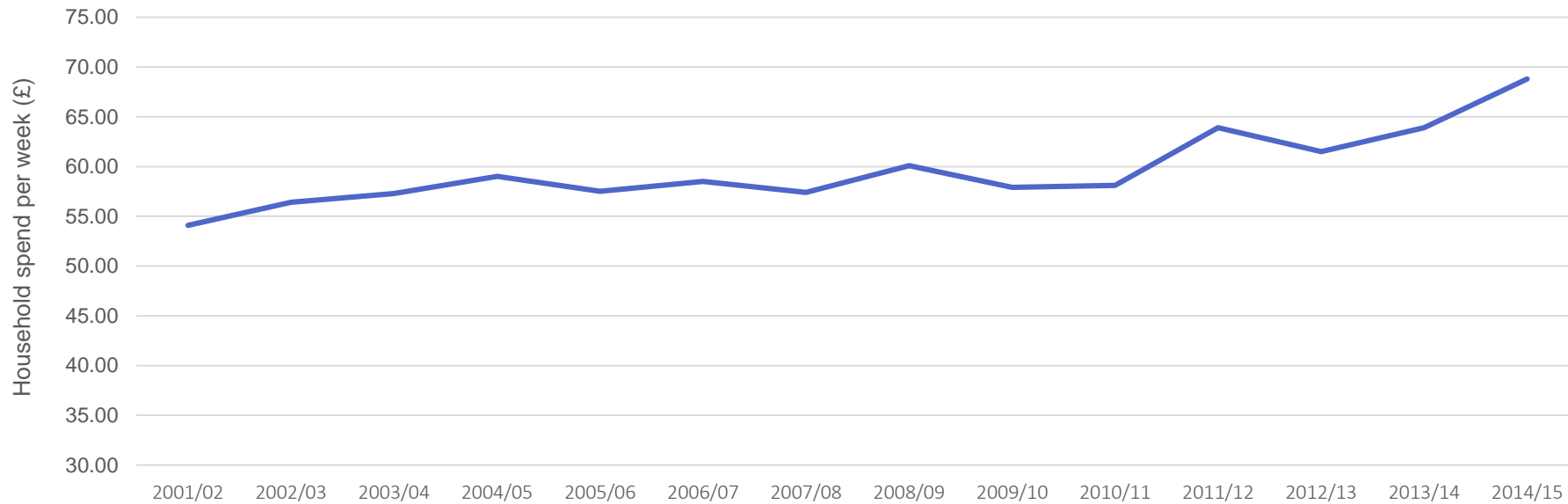


Consumer Confidence Index vs boating participation



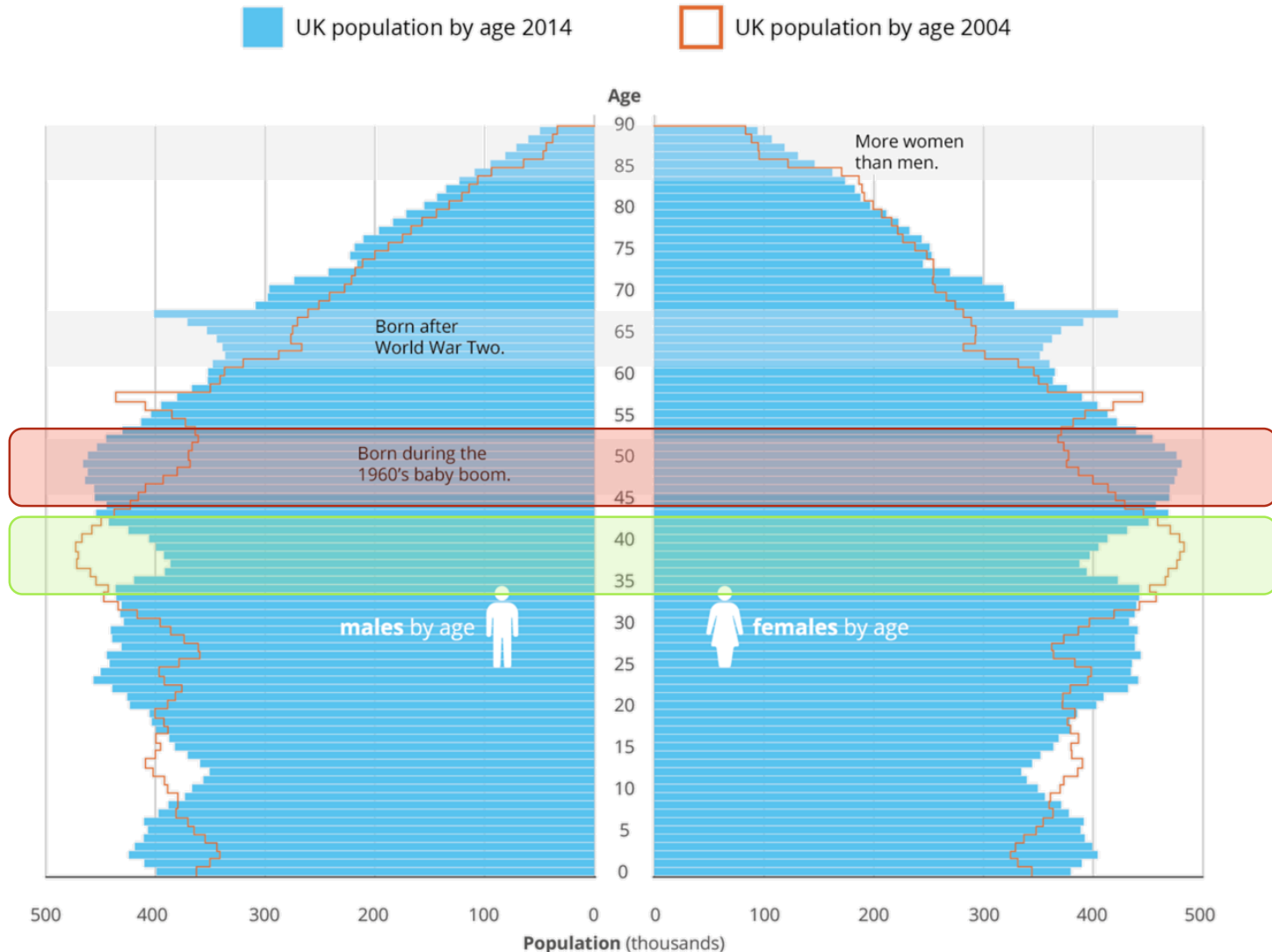
- The consumer confidence index is based on households plans for major purchases and their economic situation, both currently and their expectations for the immediate future. Basically measuring how optimistic or pessimistic consumers are.
- The idea is that if the consumers are optimistic they will tend to purchase more goods and services.
- In 2014/15, consumer confidence was higher than it has been during the past 14 years. However, participation rates for this year fell.
- Looking at the long term trends however show some correlation, especially when looking at boating participation.

Recreational and culture spend



- This chart shows the change in household spend on recreation and culture per week and is just another factor to add context to the changing participation rates. However, in the last few years as spend in this area has risen, watersports participation rates have fallen.
- As we have just seen with the consumer confidence index, spending confidence is at a high for the study period and this is reflected in spend on recreation and culture.
- The chart does not show as much shift as the consumer confidence index but there is a levelling out around the time of the recession, with the increase in the last few years showing the confidence coming back to consumers.

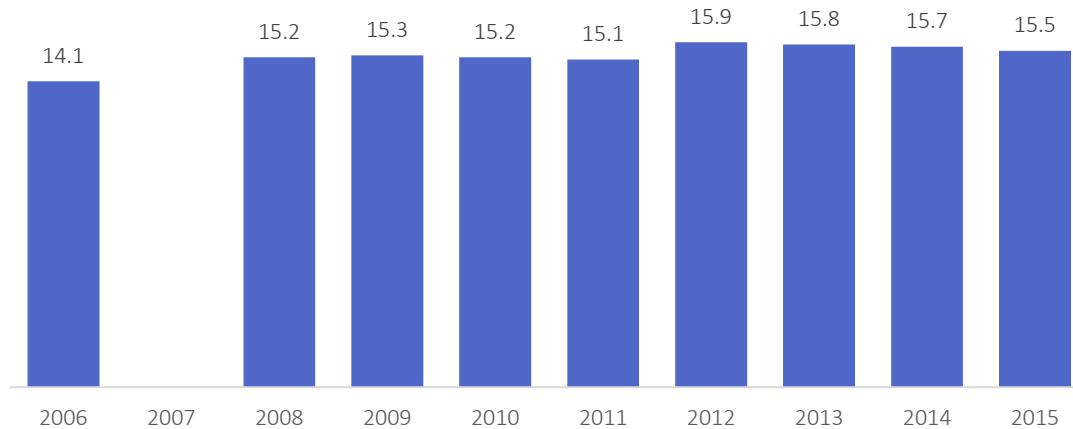
The aging population



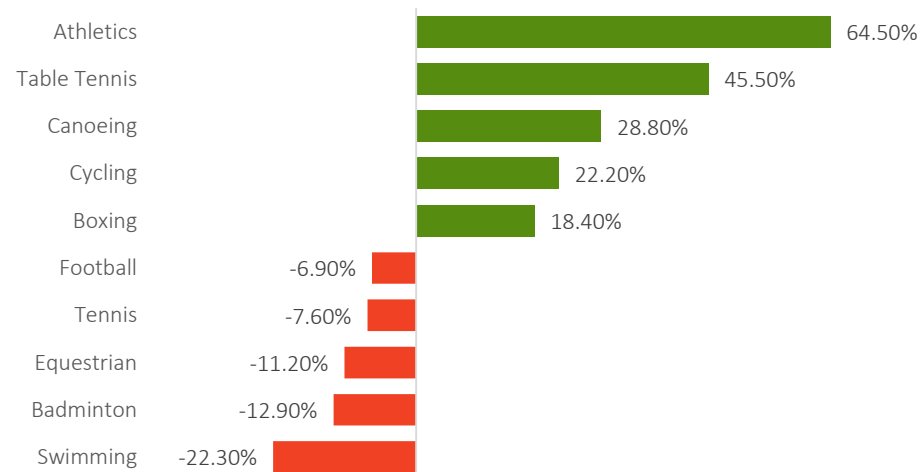
- The table shows to the left the 2004 population pyramid and the 2014 pyramid. The graph shows the age and movement of a large proportion of the population in the 1960s baby boomers.
- Historically speaking, those over the age of 55 have always had a much lower participation rate than the those younger than 55.
- As this large group are slowly approaching this age it is possible that they are retiring from the sport, and due to the ageing nature of the UK population, are not being replaced by younger participants.

Sport participation

Once a week sport participation in England
(millions)

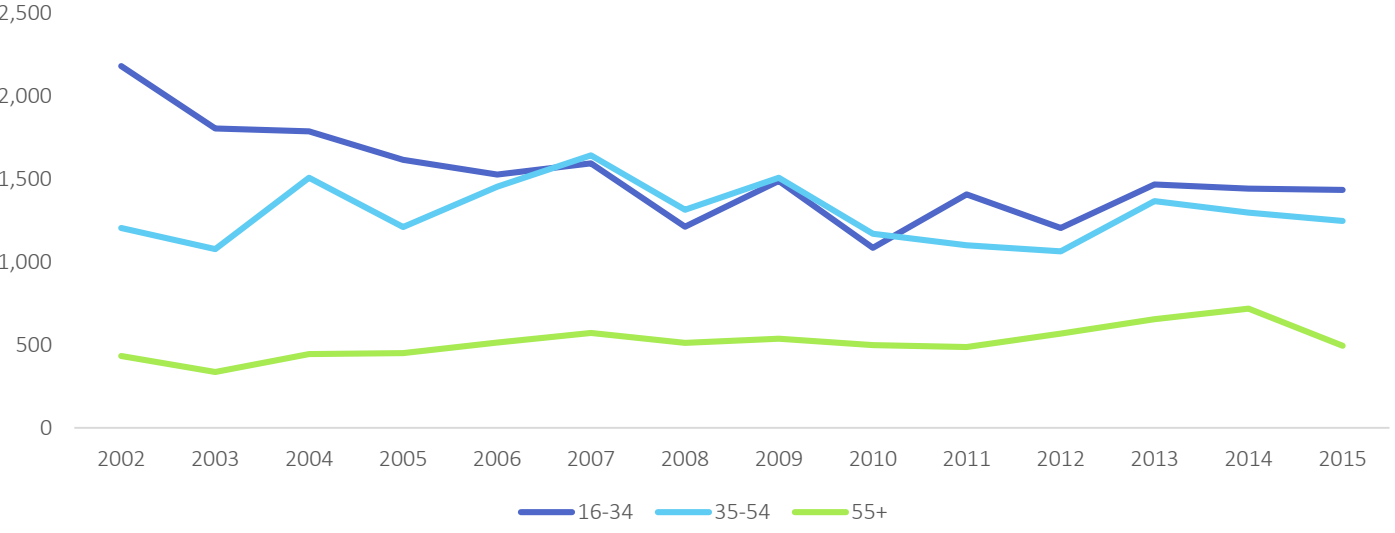
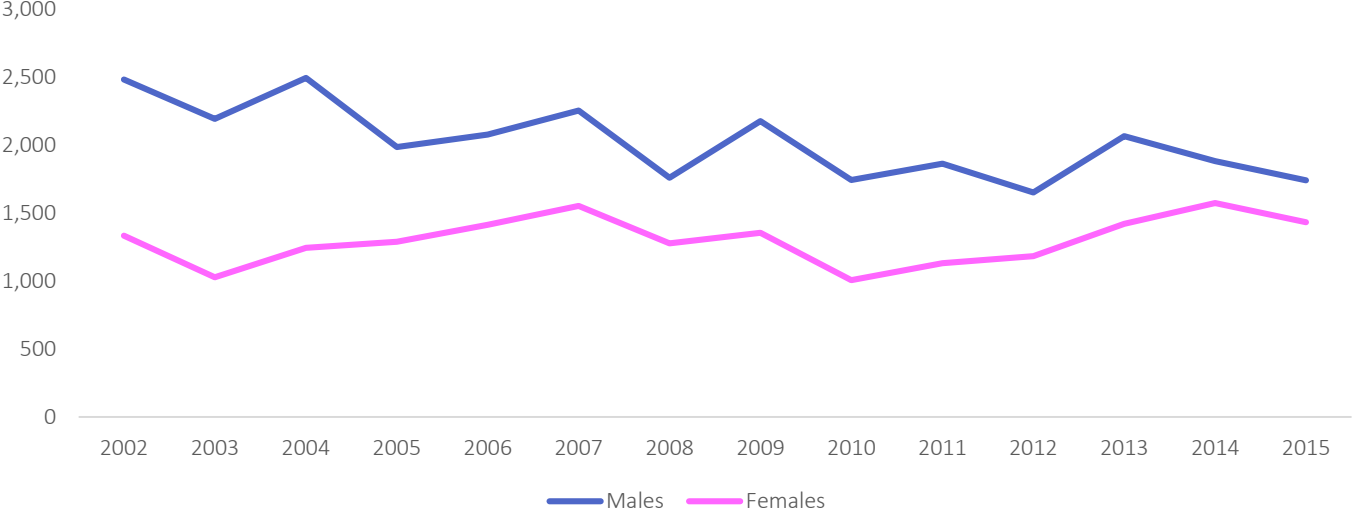


Top 5 increases and decreases since 2005/06

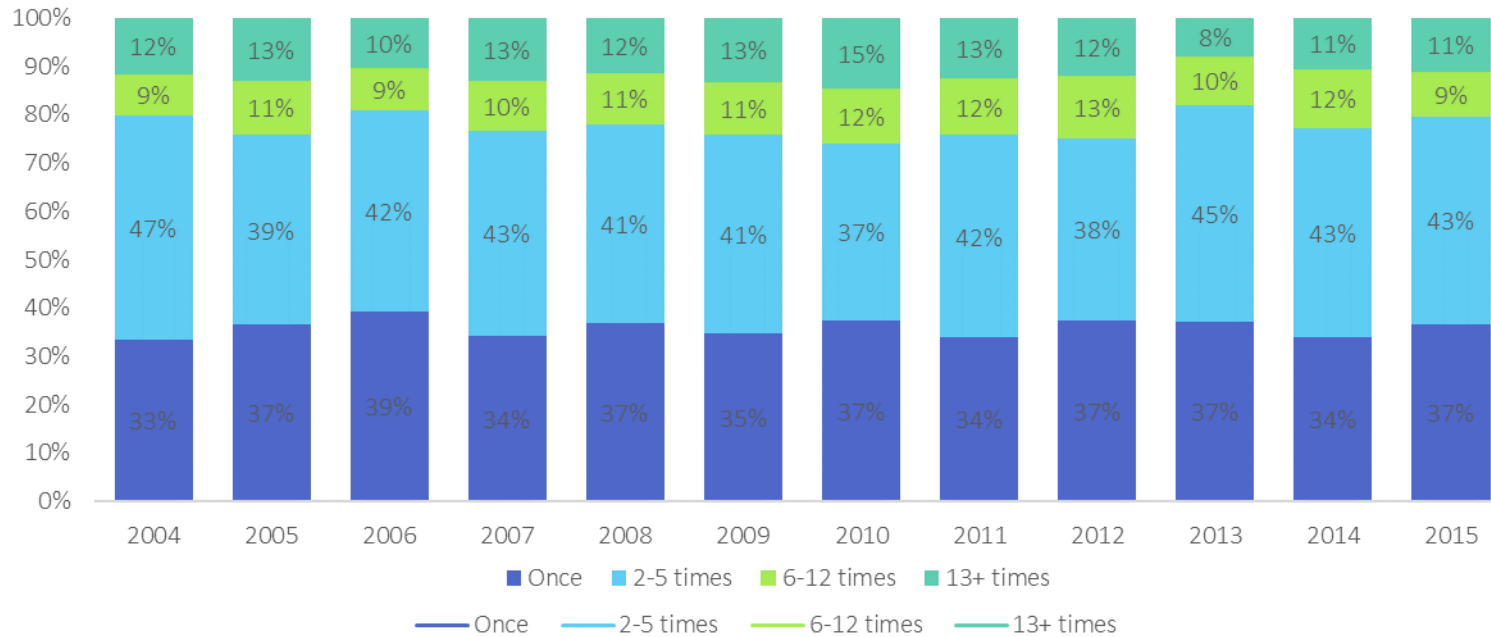


- To compare with how other sports have been comparing over this period, we have pulled together figures from the sporting participation survey conducted by Sport England.
- The figures show a general decline in participation since the Olympics in 2012.
- To highlight just a few of the biggest changes we have listed the top 5 increases and decreases since 2005/06.
 - Canoeing is up there, which we have seen reflected in our own results.
 - Swimming shows the biggest decrease over this period.

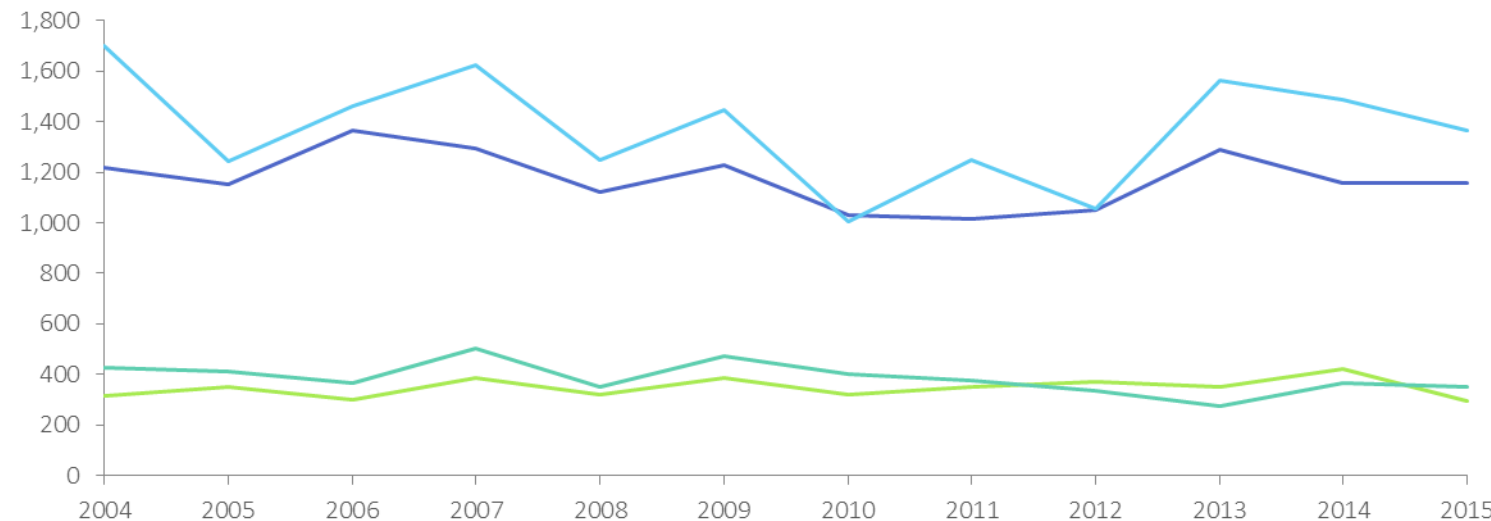
Participation by age and gender



Proportion of boating participants by frequency



- The difference in casual and enthusiastic boaters has stayed fairly consistent this year.
- Although enthusiasts have fallen the difference is only slight and the proportion has tended to fluctuate around the 20% mark for since 2012.

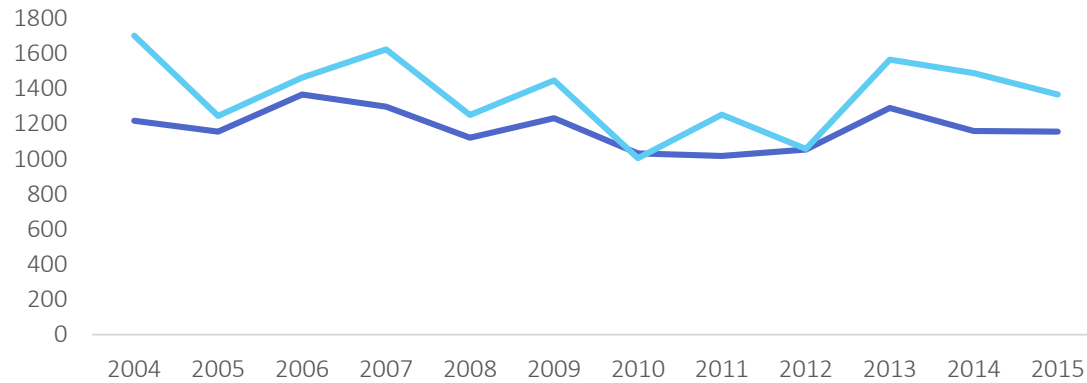


- The Olympics could have had some impact on these figures dropping in the long term.
 - From the years 2008 to 2012, the figures tended to fluctuate around the 25% mark.
 - Although 3 years past, there could still be a lingering effect

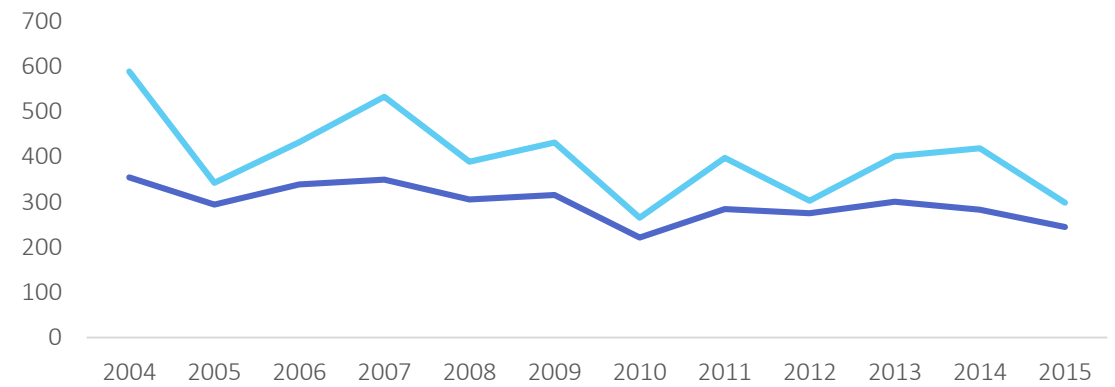
Trends in casual boating participation

Once 
 2-5 times 
 All graphs show participation in 000s

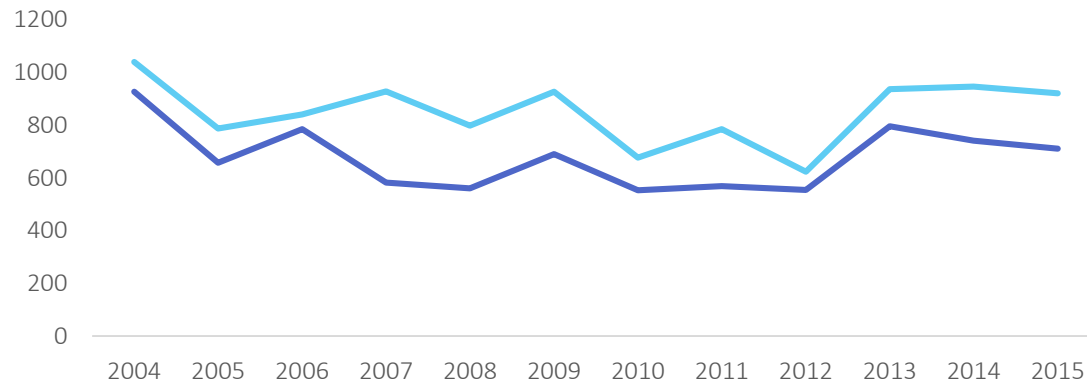
Any boating



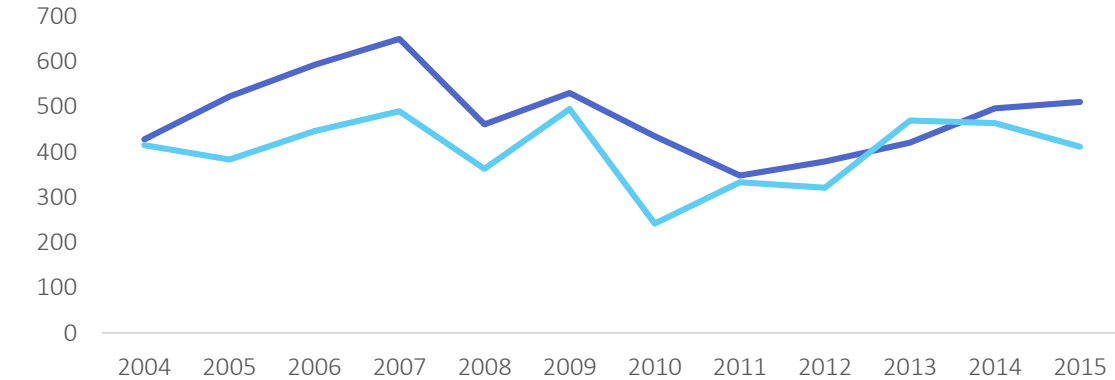
Sailing



Manual



Power



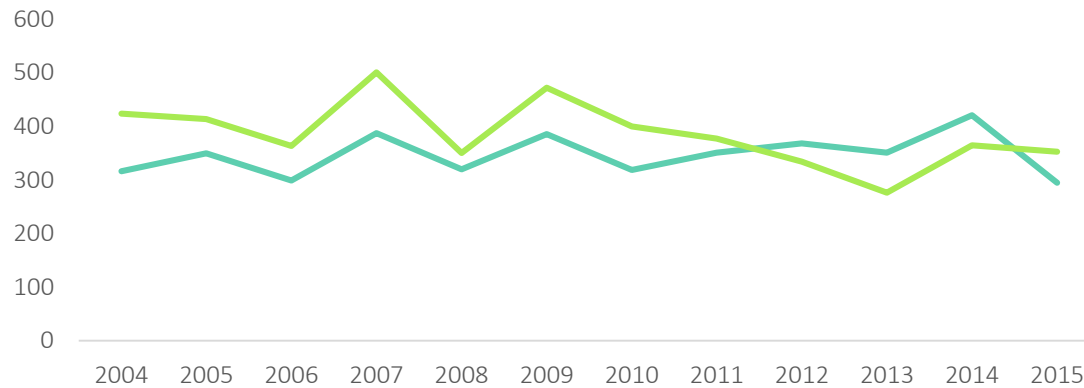
Trends in frequent boating participation

6-12 times

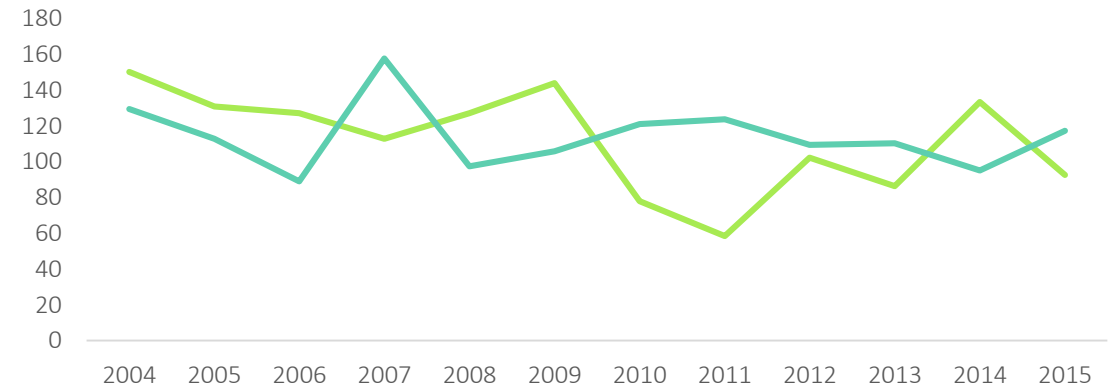
13+ times

All graphs show participation in 000s

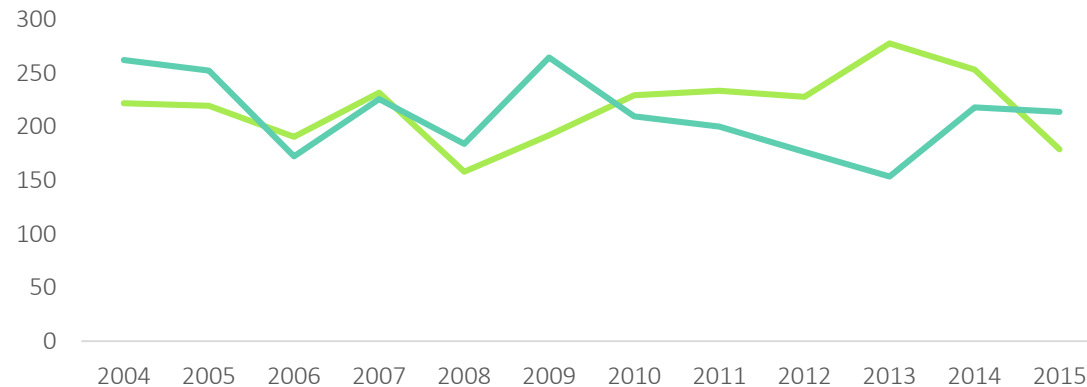
Any boating



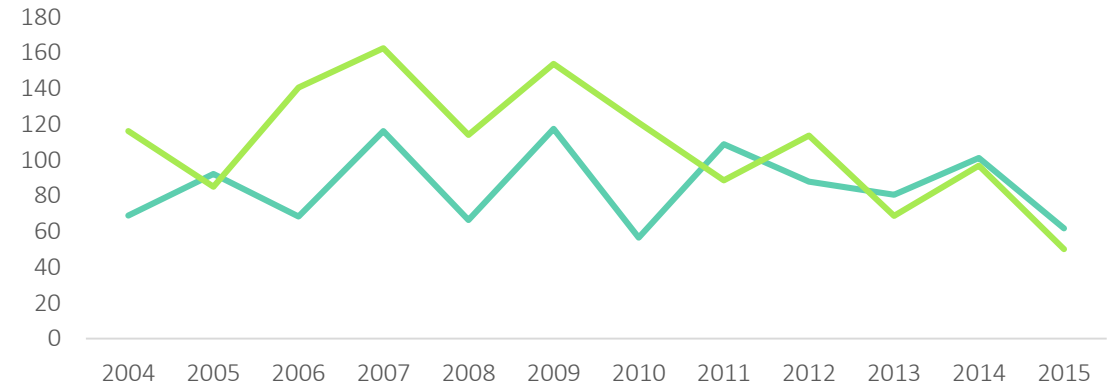
Sailing



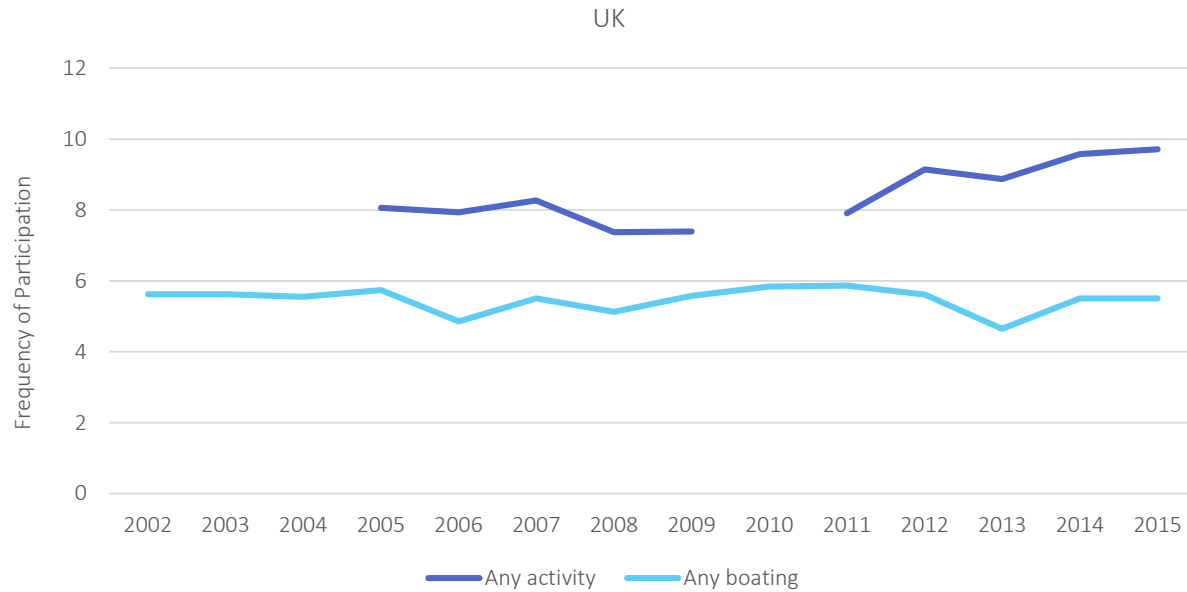
Manual



Power



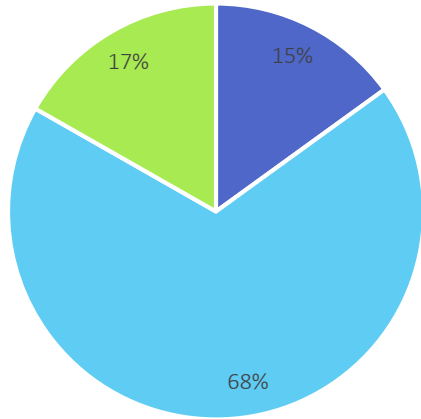
Frequency of participation



- To provide a more complete picture of trend we have estimated the frequency of participation based on the categories we collect rather than the raw numbers.
- Obviously this means the numbers we are using are estimates rather than exact numbers but what it does do is rule out any anomalies which can have a large effect on the total events.
- The first chart shows UK frequencies. For the 12 boating activities the frequency has stayed fairly constant throughout. However, for any activity we have seen an increase in participation over the last 4 years from roughly 8 times, to 10.
- Overseas boating had stayed fairly constant at around 3 to 4 times per year, but the last 3 years saw this figure drop to 3.

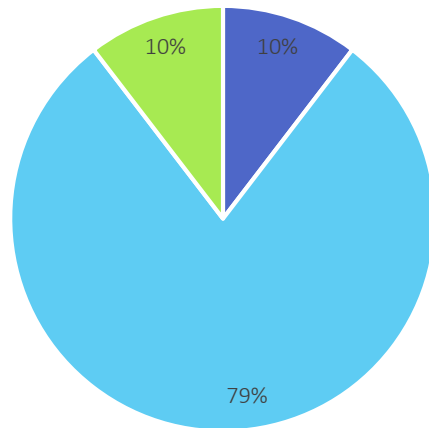
Times vs Days

Exact match...



■ Times greater ■ Same ■ Days greater

Within at least 1 difference...

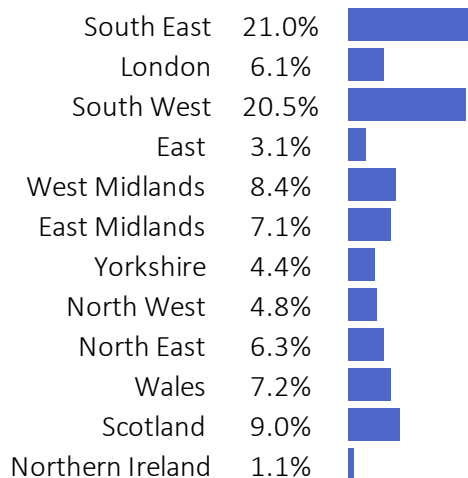
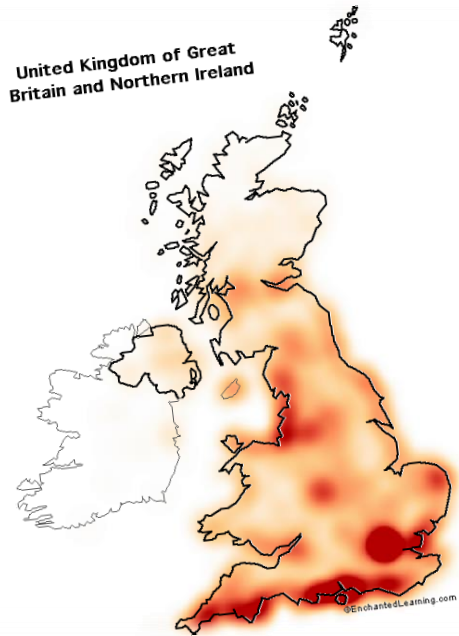


■ Times greater ■ Same ■ Days greater

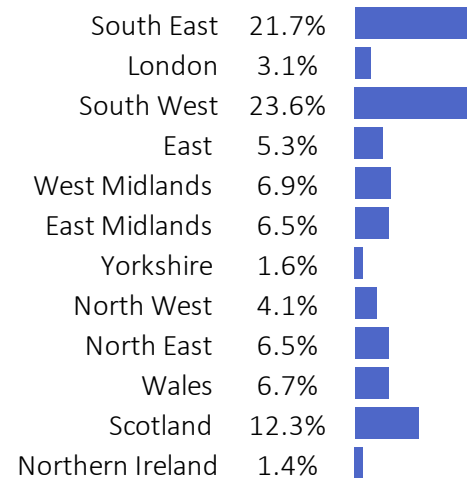
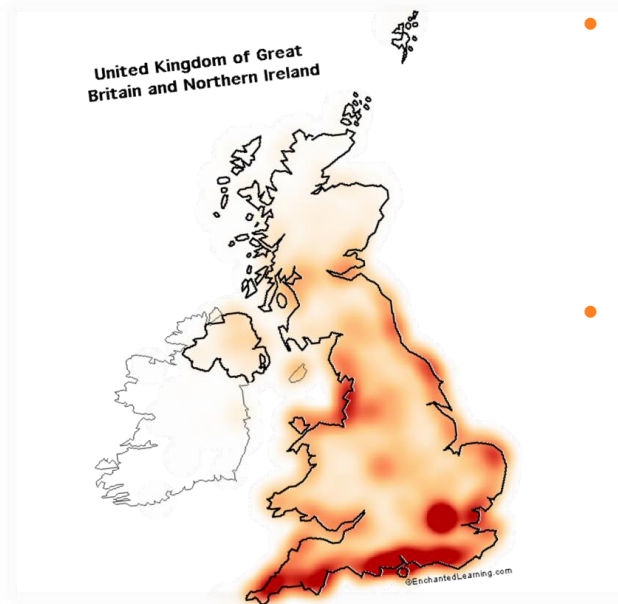
- This year we asked a new question regarding the number of days respondents participate in sea angling activities.
- We asked this as an additional question alongside the number of times they participated and we have charted the difference seen here.
- 68% of sea angling respondents stated they participated the same number of days as times with 17% stating they did it more days than times and 15% the opposite.
- When looking at the results with a bit of flexibility (1 day either side) we can see the number of matching jumps up to 79%. Showing that relatively few (21%) put drastically difference answers).

Distribution of participation

Boating activity distribution of events



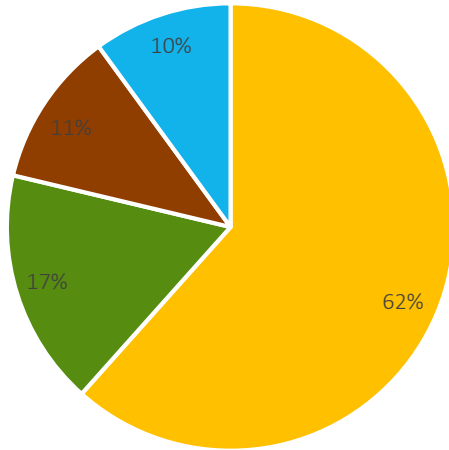
Any activity distribution of events



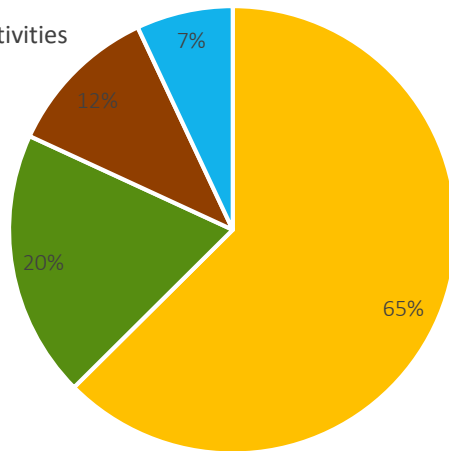
- For the 2nd year running we have asked respondents to select a point on the map for where they last participated. The data to the left shows a combined average for 2014 and 2015.
- For 'any activity', events occur all around the UK but with a higher distribution on the coast.
 - Inland areas which appear to have a higher frequency are London, Peak District and around Birmingham
 - In terms of events, the South West and South East have the highest number similarly to last year, with a slight drop down to 45.3%
- For 'any boating activity' the pattern is very similar with the south coast dominating participation.
 - London, Birmingham and the Peak District remain popular but the Lake District and Merseyside area appear more popular as well as the North East coastal region.

Seasonal Participation

All activities



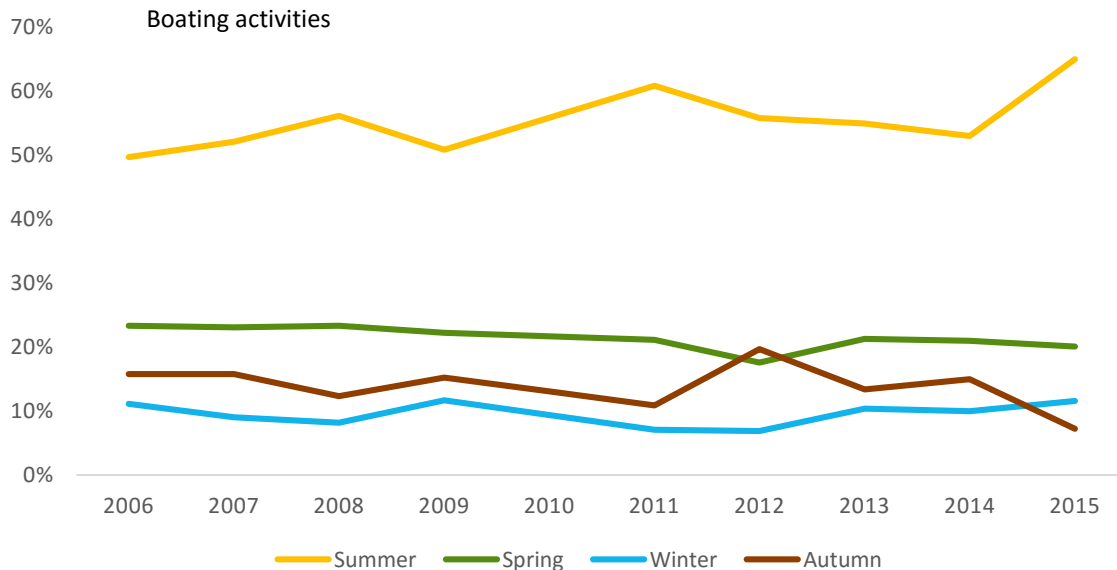
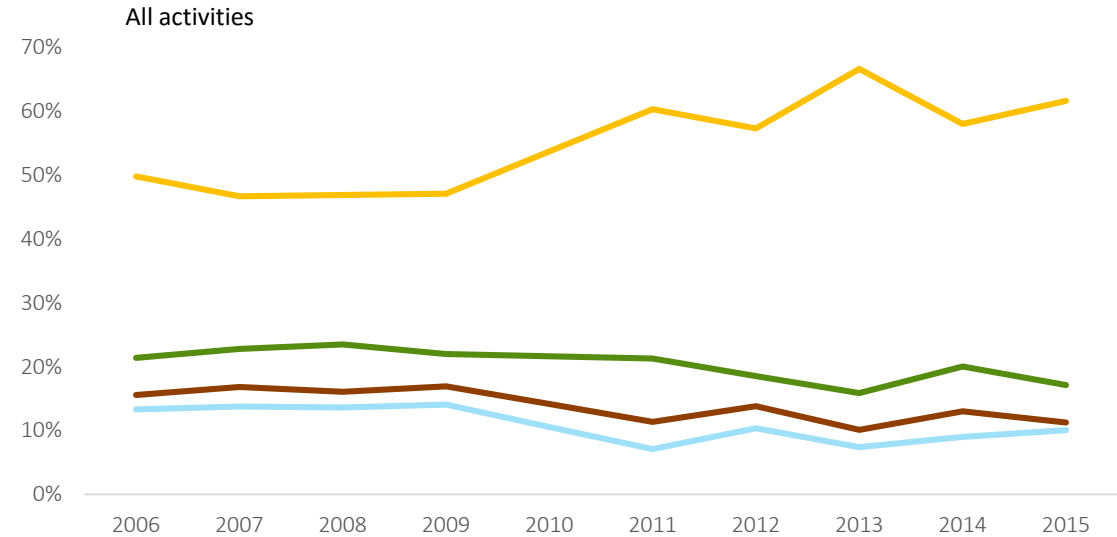
Boating activities



- This year has seen more events taking place in Summer than in previous years.
- Boating activities have seen the larger shift, with 65% of events now taking place in the Summer, up from 53% in 2014.
- The Spring still proves to be the 2nd most popular season with the Winter only taking a small proportion.

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

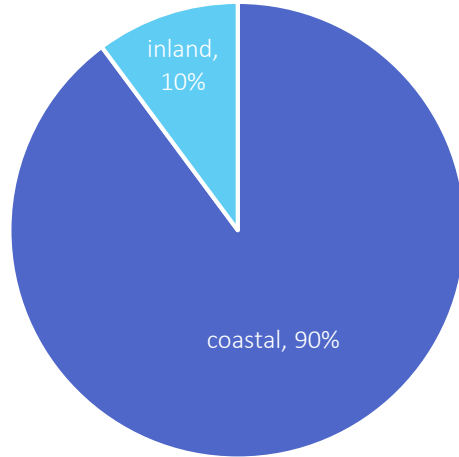
Seasonal trends



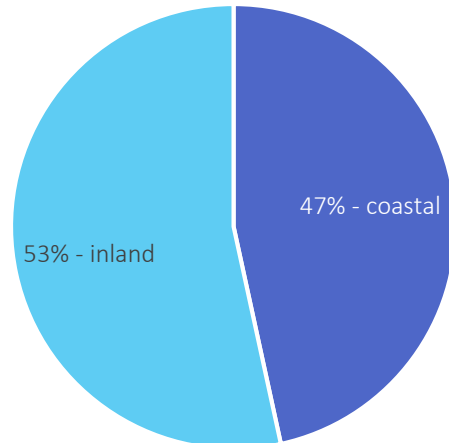
- 2015 continued the general upward trend for more events to be participated in the Summer.
- Boating saw a sharp increase of Summer events in 2015, with an even decline seen across the other seasons.
- Although not as pronounced, and the figures tend to fluctuate, there is an upward trend in Summer events for boating too.

Coastal Participation

All activities



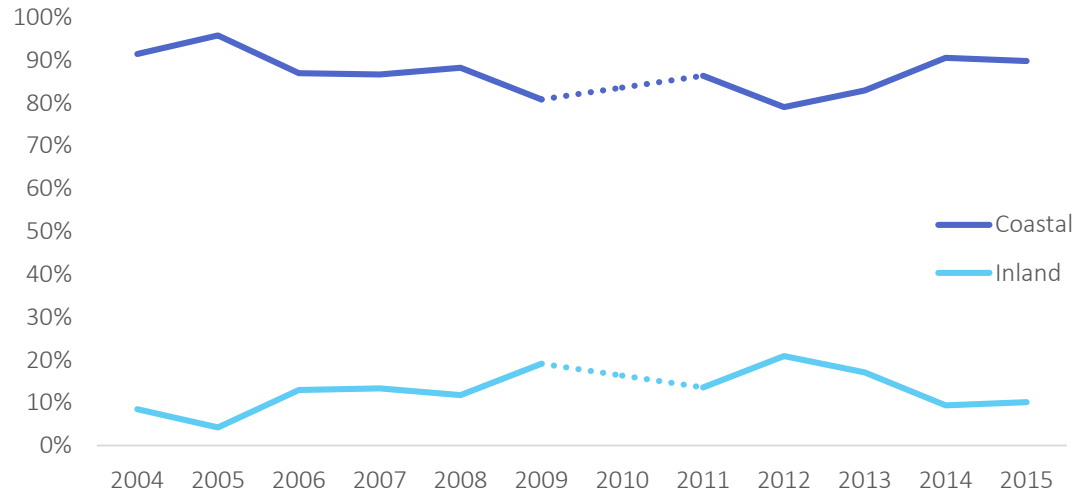
Boating activities



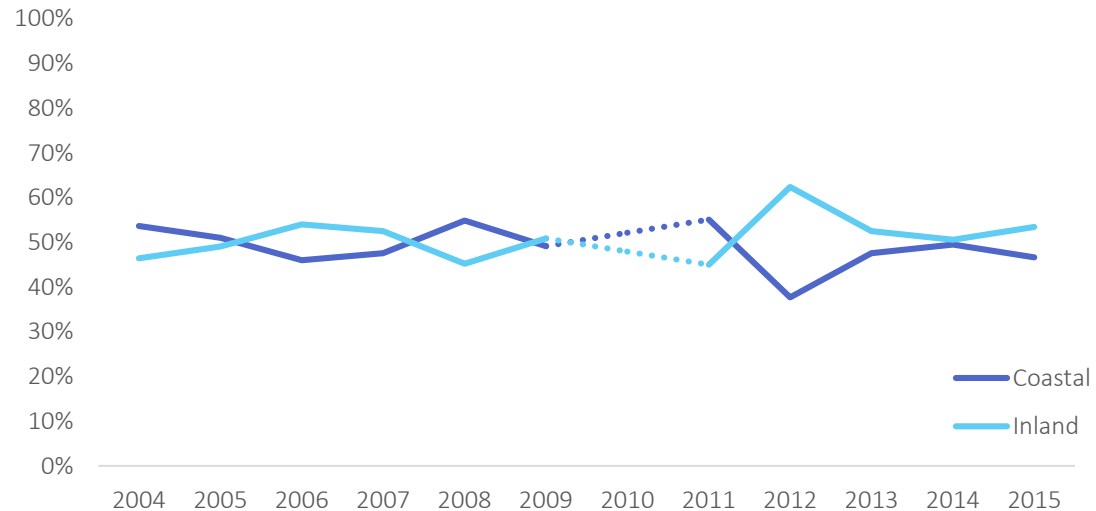
- For 'any activity' participation, the proportion taking place at the coast has stayed at 90% this year, the same as in 2014..
- The figure will have been slightly affected by the change in angling activities but this has not caused any shift.
- For 'any boating activity' the participation continues to stay around 50% for both inland and coastal activities. However, 2015 saw a slight shift to inland participation.

Coastal trends

All activities



Boating activities



- Trends in all activities had been showing a shift towards more inland activities but the last 3 years have pushed the proportion of coastal activities back up, it is now at 90%.
- For all boating activities the split continues to fluctuate around 50% inland and coastal.

Boat ownership trends

	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-15
Any boat	2.7%	2.5%	2.7%	2.8%	2.7%	2.7%	2.6%
Small sailing boat	0.6%	0.5%	0.6%	0.7%	0.6%	0.6%	0.6%
Sailing yacht	0.3%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
Power boat	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
Motor boat	0.4%	0.4%	0.4%	0.3%	0.2%	0.3%	0.3%
Canal boat	0.1%	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%
Canoe/kayak	0.9%	0.9%	1.0%	1.1%	1.1%	1.2%	1.2%
Rowing boat	0.1%	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%
RIBs/Inflatables or sportsboats	0.2%	0.1%	0.3%	0.2%	0.2%	0.1%	0.1%
Windsurfer	0.3%	0.3%	0.3%	0.2%	0.2%	0.2%	0.2%
Personal Watercraft	0.1%	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%

- Boat ownership has stayed fairly stable moving into 2015, with just a slight decline on the 3 year average.
- This story is the same across all the individual boat types, all have stayed fairly level.

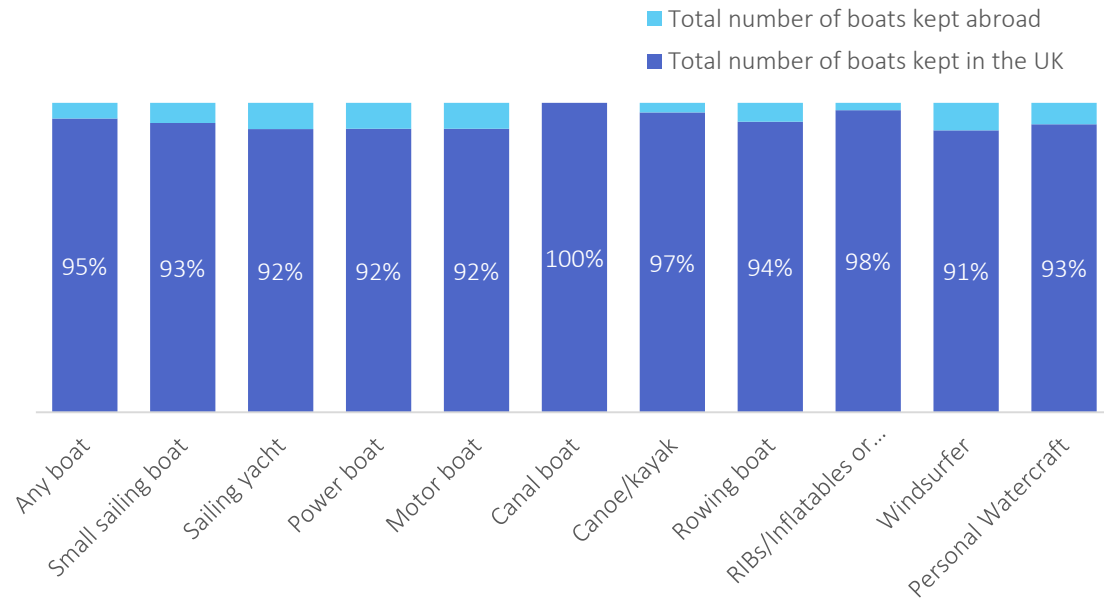
Boat ownership trends - detailed

	2010-2012			2011-2013			2012-2014			2013-2015		
	Number of boats owned by households	Number of boat owning households	% kept in the UK	Number of boats owned by households	Number of boat owning households	% kept in the UK	Number of boats owned by households	Number of boat owning households	% kept in the UK	Number of boats owned by households	Number of boat owning households	% kept in the UK
Any boat	1,232,775	753,854	91%	1,163,726	721,176	92%	1,214,154	712,530	95%	1,130,266	681,644	95%
Small sailing boat	208,211	173,321	95%	201,704	165,866	92%	204,670	165,431	95%	178,433	146,017	93%
Sailing yacht	67,491	70,619	93%	66,510	61,211	95%	54,246	50,540	95%	58,110	55,227	92%
Power boat	55,766	54,224	71%	52,788	45,390	77%	46,550	44,903	86%	44,540	44,540	92%
Motor boat	97,969	91,993	91%	68,066	65,324	93%	82,799	78,573	95%	80,249	72,502	92%
Canal boat	41,069	43,252	89%	37,607	36,423	90%	28,814	28,814	97%	33,056	30,900	100%
Canoe/kayak	424,825	260,219	94%	512,150	295,823	94%	573,614	320,717	96%	530,642	312,320	97%
Rowing boat	49,658	46,447	86%	42,366	36,834	87%	41,450	33,868	91%	42,542	33,942	94%
RIBs/Inflatables or sportsboats	53,240	40,574	91%	54,285	45,483	94%	47,086	39,187	92%	37,069	31,988	98%
Windsurfer	87,563	49,318	97%	86,180	54,245	91%	100,917	54,953	93%	90,619	46,430	91%
Personal Watercraft	49,052	44,368	82%	42,070	30,989	83%	34,008	24,357	89%	35,006	23,081	93%

- There continues a trend of the falling number of households owning a boat. However, the number of boats owned per household declines at a lesser rate.
- 1,130,266 boats were recorded per year on average for the years 2013 to 2015. Down roughly 84,000 on the earlier 3 year period.
- Canoes and kayak continue to be the most popular of the boats, making up 47% of ownership (roughly the same figure for 2012-14).

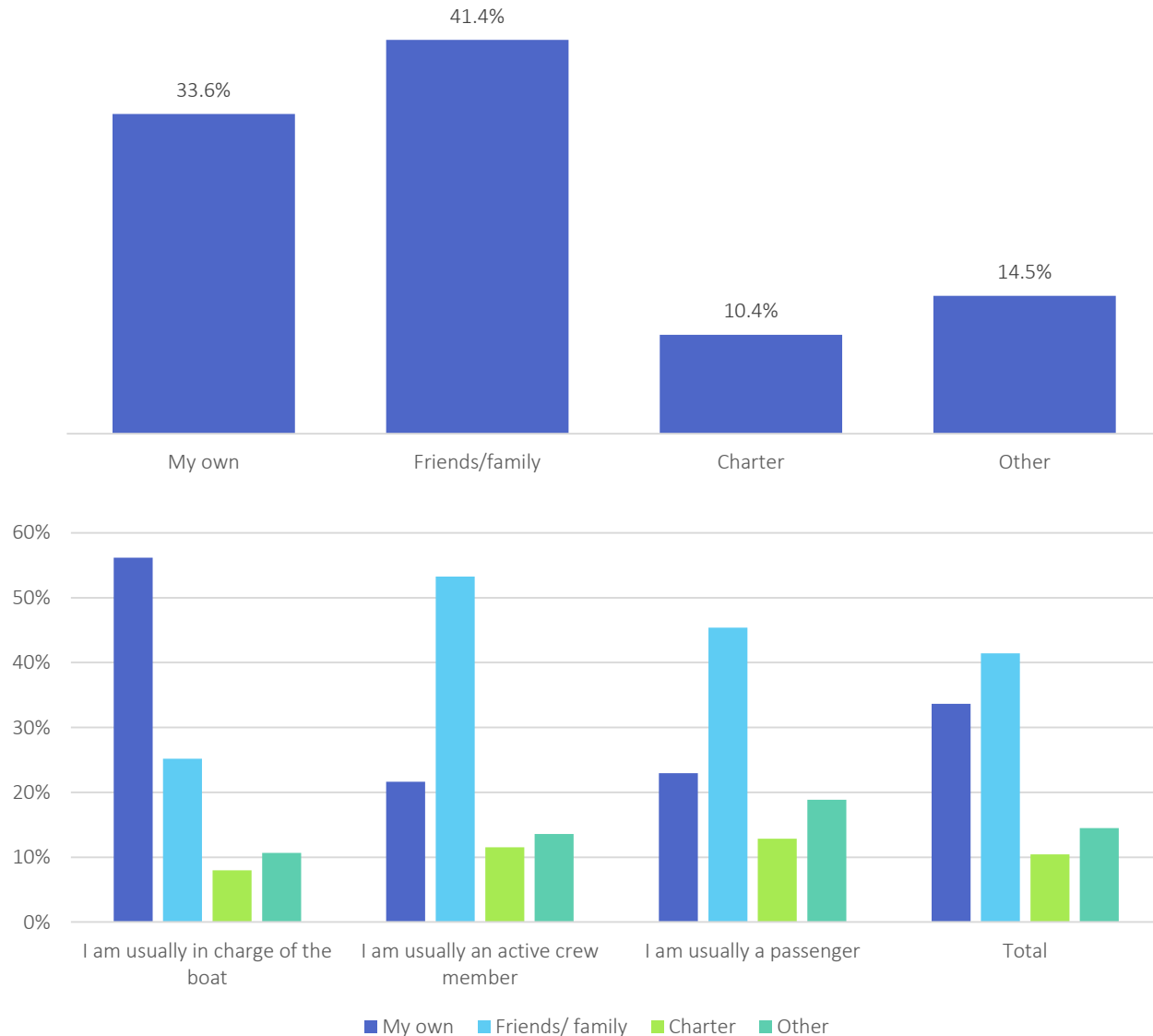
UK vs. Abroad ownership

	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	1,130,266	1,072,569	57,697	681,644
Small sailing boat	178,433	166,764	11,668	146,017
Sailing yacht	58,110	53,208	4,903	55,227
Power boat	44,540	40,808	3,733	44,540
Motor boat	80,249	73,509	6,740	72,502
Canal boat	33,056	33,056	0	30,900
Canoe/kayak	530,642	513,939	16,703	312,320
Rowing boat	42,542	39,924	2,618	33,942
RIBs/Inflatables or sportsboats	37,069	36,183	886	31,988
Windsurfer	90,619	82,591	8,029	46,430
Personal Watercraft	35,006	32,589	2,417	23,081



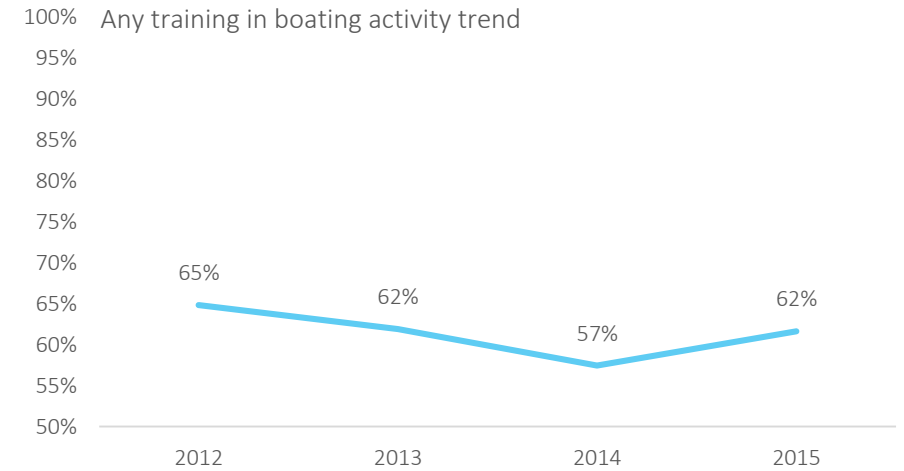
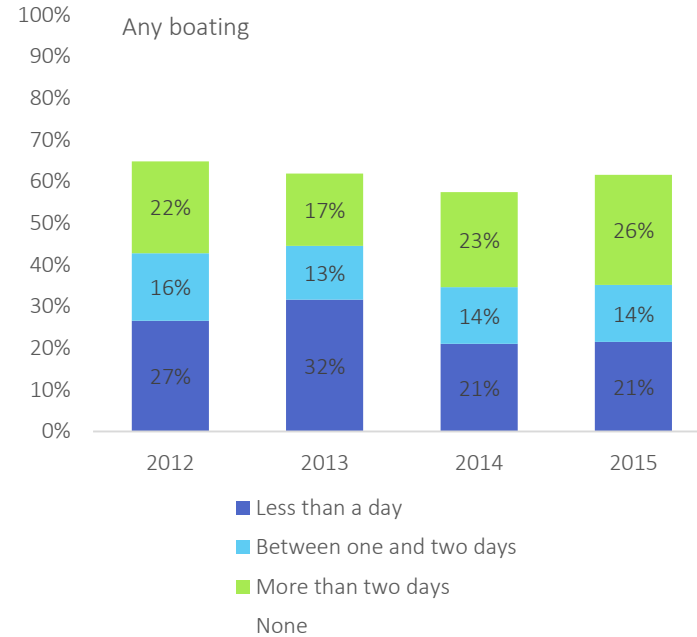
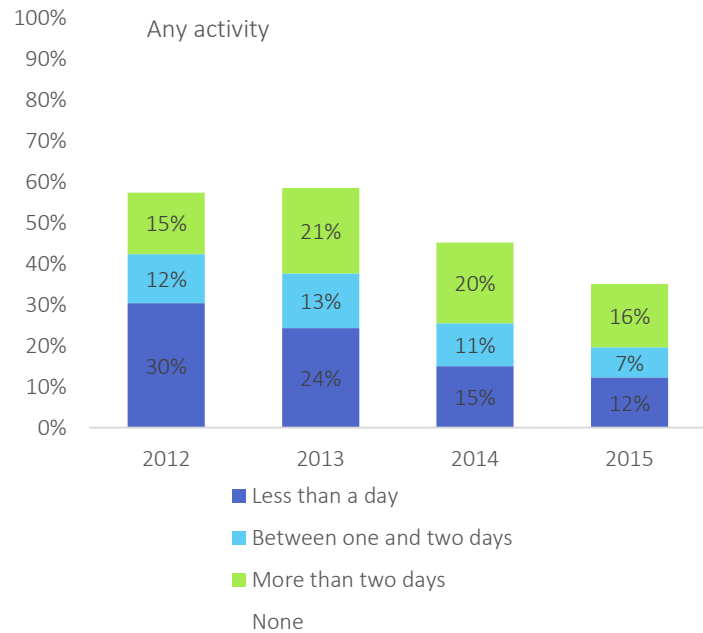
- Comparing ownership in the UK and abroad shows that 95% are kept in the UK, up from 92% in 2008-2010.
- There has been a shift for boats to be kept in the UK rather than abroad in recent years. All boat types now show over 90% being kept in the UK.

Who owns the boat



- For all activities, going on a friend or family members boat was the most popular way they last took to the water.
- Around a 1/3rd for most activities actually went on their own boat.
 - Using personal watercraft and windsurfing were particularly high in this regard.
- With regards to their role once on the boat, those who own the boat are usually in charge (56%) whilst a quarter do allow their friends and family to be in charge.

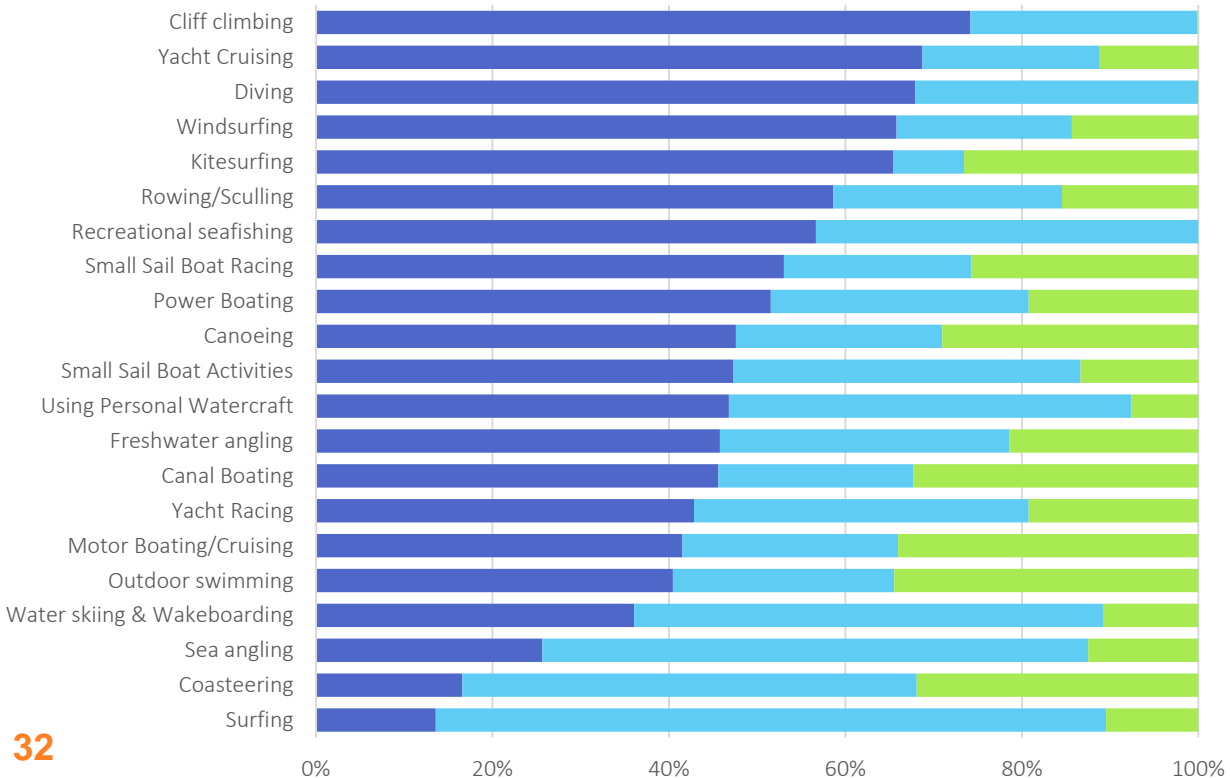
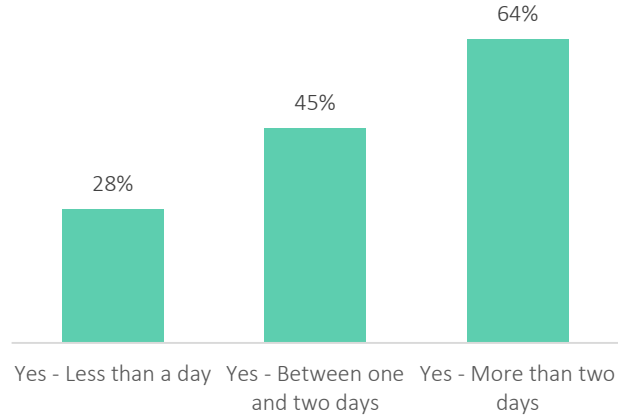
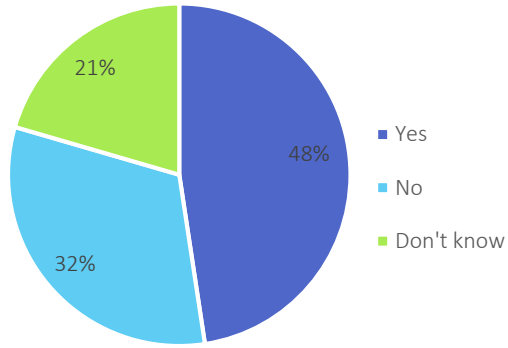
Proportion of training



- The trend in 'any activity' training continues to be a shift towards less training. However, it should be noted that over the years this question has been asked of differing activities so the figure might not be entirely representative. Even in 2015 we have added a number of sea angling options that may affect the score.
- The 12 core boating activities though have been asked consistently since 2012. These proportions show a much more level trend with around 60% of people having done some sort of training.
- 2015 has shown the greatest number of boaters with more than 2 days training (26%) and based on 2014 proportions has taken a positive step.

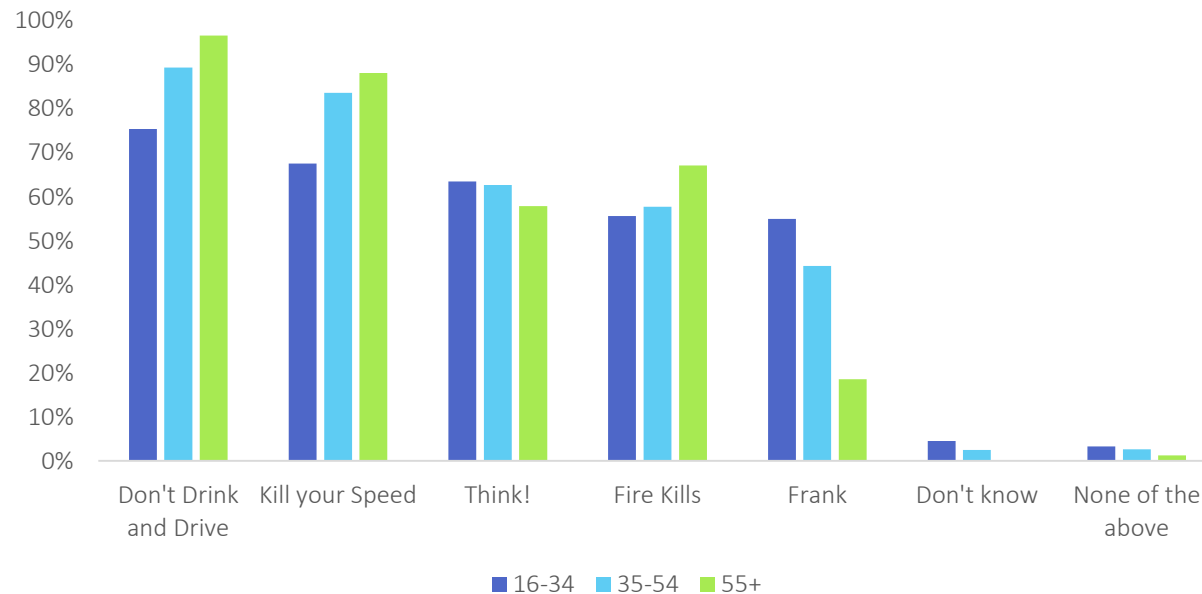
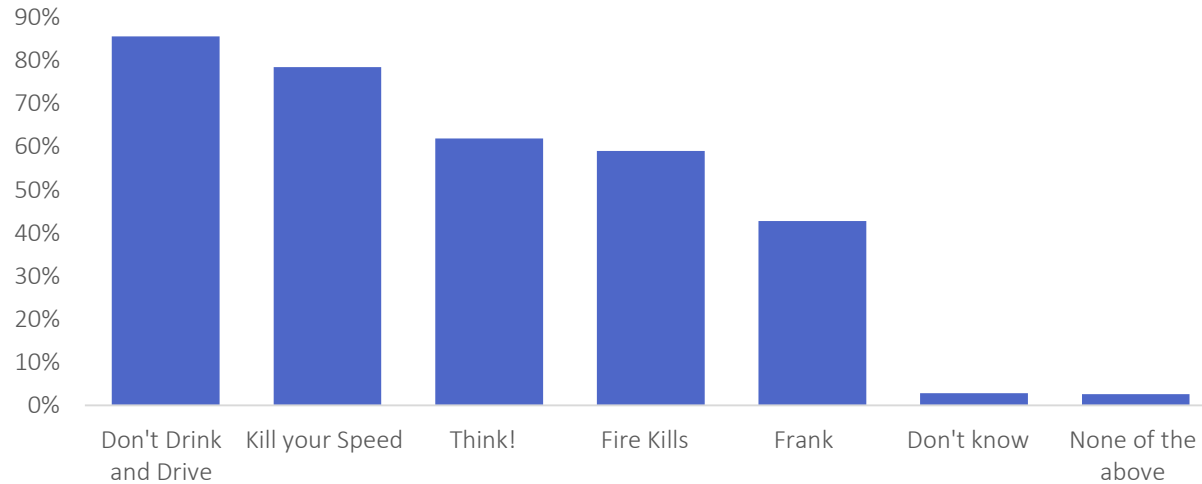
Safety messages from training

Do you remember any safety messages...



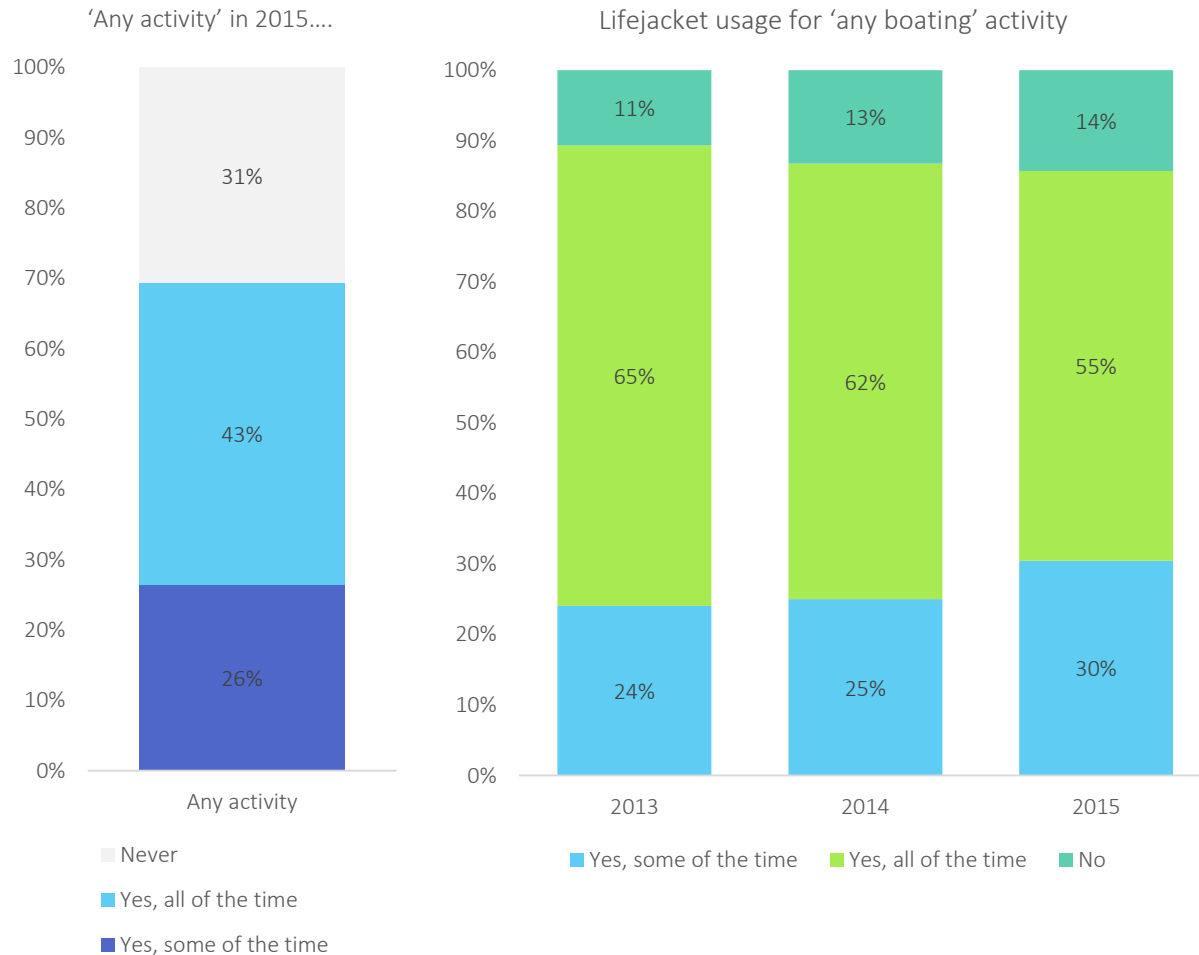
- 48% of those who received training remembered a particular message from it.
- Unsurprisingly, the more days training they had taken, the more likely they are to remember a message (64% could remember a message if they had more than 2 days compared to 28% who had less than a day).
- Cliff climbing, yacht cruising and leisure sub aqua diving participants who had had training were most likely to remember a safety message.
 - This is likely explained by the type of activity containing more risk than some towards the bottom of our table (surfing, coasteering, angling etc.)

Government and public safety messages



- Only 3% of people said that they hadn't seen any of the safety messages, and a further 3% said they didn't know
- Don't drink and Drive is the most well remembered message with 86% of respondents saying they had seen it, followed by 'Kill your speed' which 79% of respondents have seen.
- Although most messages are better remembered by the older age group, some safety campaigns have been more successful in connecting with younger audiences. For example 'Frank' and 'Think!'

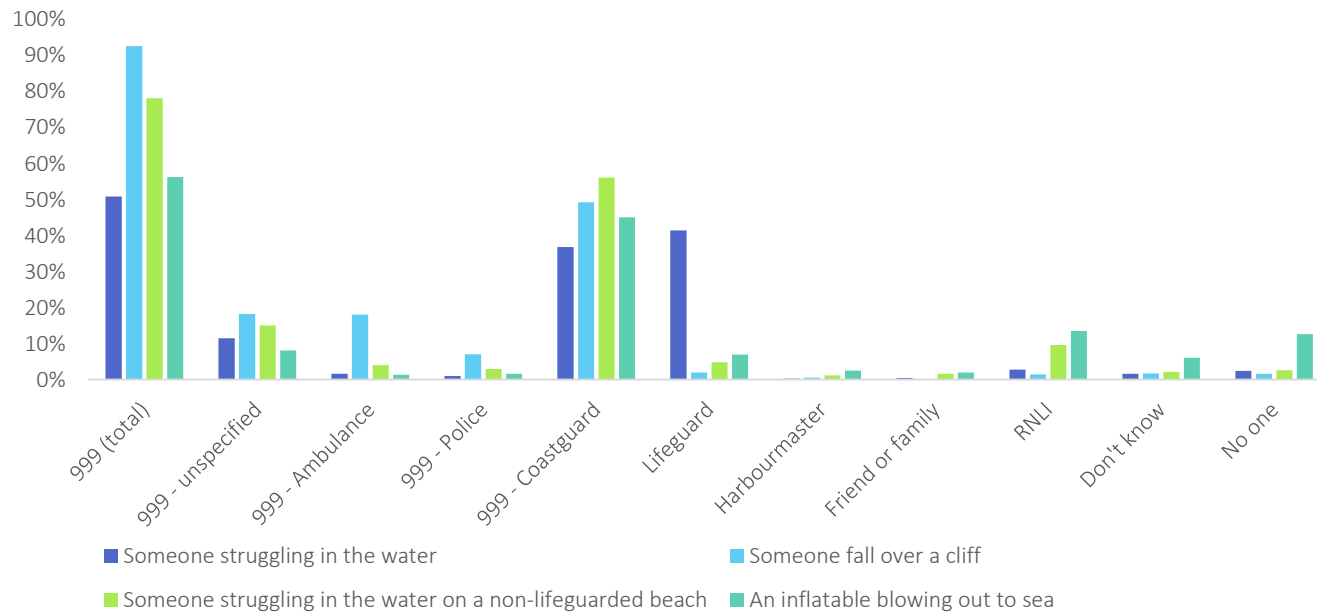
Proportion using lifejackets whilst boating



- When taking part in 'any activity' 69% wear a lifejacket at least some of the time. This figure is down on 2014, where 76% wore a lifejacket – this also decreased from 2013 where 83% wore a lifejacket.
 - Again this is likely due to the change in activities.
- In terms of 'any boating activity' the figure stands at 85%.
- The general trend for lifejacket usage whilst boating has been in slight decline since 2013. Although the overall proportion has only fallen slightly (down 3% points). There has been a shift from wearing a lifejacket all of the time, to just some of the time.

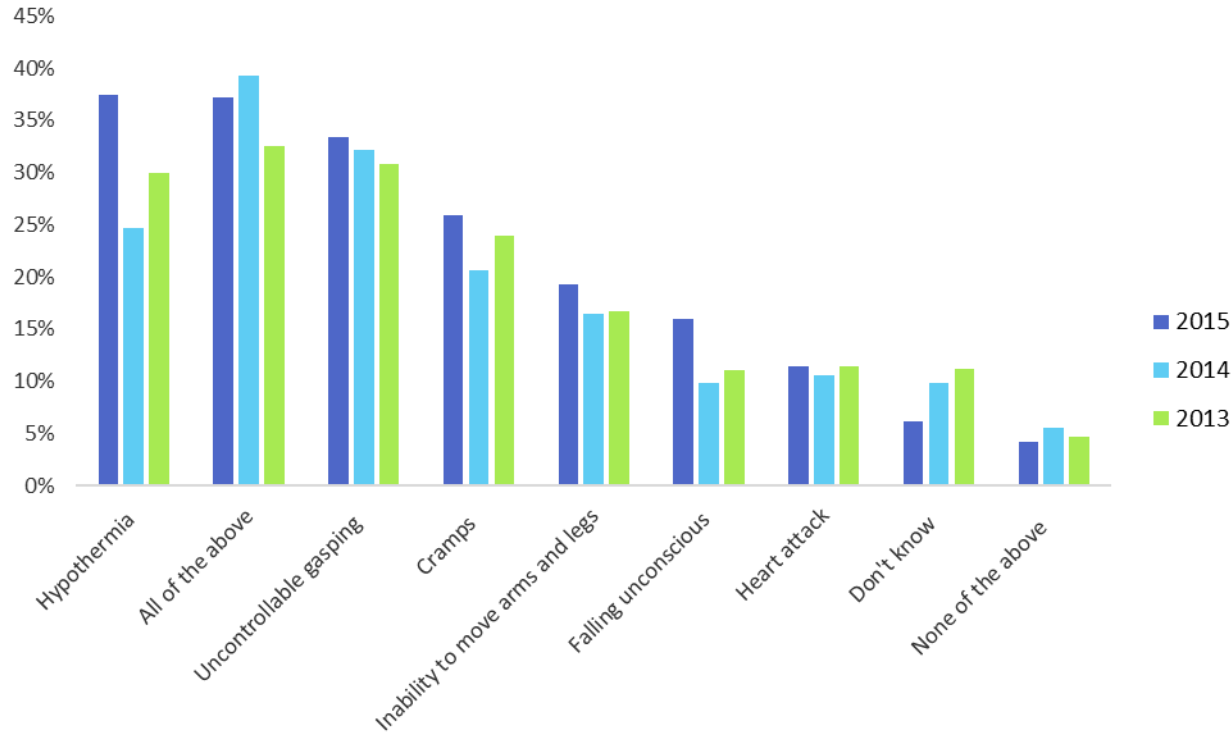
Reaction to incidents whilst participating

	Someone struggling in the water	Someone fall over a cliff	Someone struggling in the water on a non-lifeguarded beach	An inflatable blowing out to sea
999 (total)	51%	93%	78%	56%
999 - unspecified	11%	18%	15%	8%
999 - Ambulance	2%	18%	4%	1%
999 - Police	1%	7%	3%	2%
999 - Coastguard	37%	49%	56%	45%
Lifeguard	41%	2%	5%	7%
Harbourmaster	0%	1%	1%	3%
Friend or family	0%	0%	2%	2%
RNLI	3%	1%	10%	14%
Don't know	2%	2%	2%	6%
No one	2%	2%	3%	13%



- The majority of participants will call 999 in regards to most incidents they encounter – in particular the coastguard
- When they see someone struggling in the water then they are more likely to call the lifeguard.

Cold water symptoms



- 37% of respondents recognise that these are all cold water symptoms which is an improvement on 2013 however a drop from 2014
- Uncontrollable gasping and hypothermia are still the two most recognised symptoms, after falling last year recognition of hypothermia has increased by over 10%
- This year the number of people saying they didn't know dropped to 6% from 10% last year

Summary

- Summer temperature, annual temperature and sunshine hours fell back to around the average for the period 2002-15. After peaking in 2013 and remaining fairly high for 2014, 2015 has been a more average year and these changes could have been a cause of the falling participation rate.
 - 2013 was an unusually high year for participation, likely caused by the hotter temperatures but also a fall out from the London Olympics in the previous year. 2014 likely still carried some effect from this year with 2015 figures being more representative of a general decline in participation.
- Participation has continued a shift towards peak Summer months with 2015 seeing 62% of events taking place between June and August. This figure is up from 50% back in 2006.
- In terms of individual activities, 2015 still saw canoeing as the top participated in boating activity albeit with a slight decline in numbers (~1.4m). Generally speaking all boating activities fell in rates from 2014 to 2015.
- Of the 3.2m boating participants, 2015 saw 20% taking part in activities more than 6 times in the past year. This number of 'enthusiasts' has fluctuated around this level for the past 13 years, with the actual volume of enthusiasts staying roughly level.
- Boat ownership fell very slightly to 2.6% of households meaning that around 682,000 owned a boat in 2015. In total 1.1m boats were owned.

This years report has been funded by:

- British Marine Federation
- Royal Yachting Association
- Maritime and Coastguard Agency
- Royal National Lifeboat Institution
- British Canoe Union
- Centre for Environment Fisheries and Aquaculture Science



Maritime and
Coastguard Agency



Lifeboats



Cefas

Contact: *Iain Gibson/Ed Bird*

Email: *Iain.Gibson@arkenford.co.uk/Ed.Bird@arkenford.co.uk*

Address: 1 Bell Court, Leapale Lane, Guildford GU1 4LY

Tel: 01483 510310 Website: www.arkenford.co.uk

