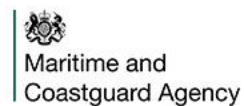




Arkenford

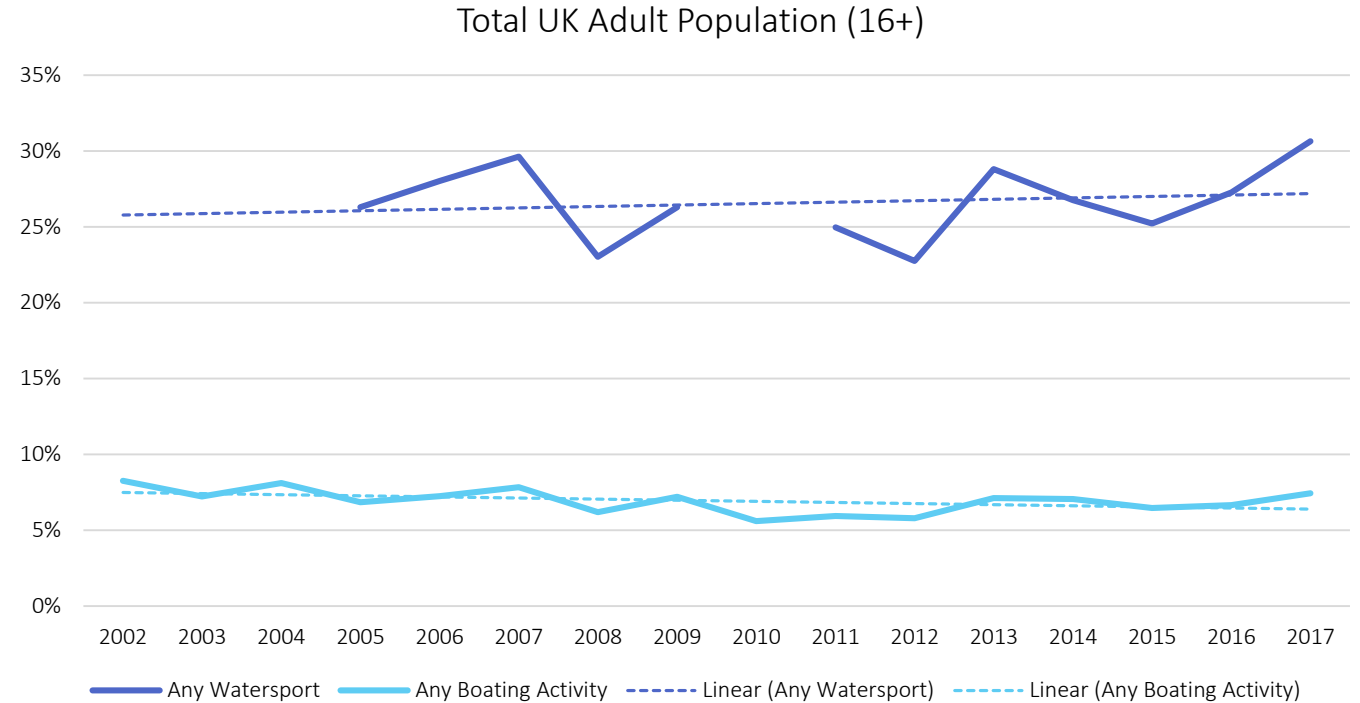
WATERSPORTS PARTICIPATION SURVEY

Summary Report



Headlines

- The volume of participants in ‘any activity’ and ‘any boating activity’ are the highest since the survey began
- Participation in ‘any activities’ has increased 3.4% points since last year, which equates to a best estimate volume of participation amongst UK adults of around 16.3m
- Participation in ‘any boating activity’ increased by 0.8% points since 2016, which equates to 461,000 more adults having taken part in a boating activity
- Approximately 4m UK adults took part in a boating activity in 2017



		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Any Watersport	%	-	-	-	26.3%	28.0%	29.6%	23.0%	26.3%	-	25.0%	22.7%	28.8%	26.8%	25.2%	27.3%	30.6%
	000s	-	-	-	12,580	13,506	14,400	11,294	12,893	-	12,589	11,153	14,124	13,127	12,364	14,300	16,318
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%	6.7%	7.4%
	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	3,459	3,176	3,494	3,955

Participation Summary

- The most popular activities in 2017 remain the ones which are most accessible without the need for any training or equipment
 - Spending leisure time at the beach
 - Coastal walking
 - Outdoor swimming
- Out of the 'any boating activities', canoeing was participated in by an estimated 1.9m UK adult residents and for 'any activities', an estimated 9.0m spent general leisure time at the beach
- Overall the participation rate for 'any activity' in 2017 stands at 30.6%, and for 'any boating', 7.4%

	%	000s	
Any watersports activity	30.6%	16,318	
Any boating activity	7.4%	3,955	
Small sailboat racing	0.4%	205	
Small sailboat activities	0.9%	499	
Yacht racing	0.3%	155	
Yacht cruising	0.8%	445	
Power boating	0.7%	364	
Motor boating	1.3%	681	
Canal boating	0.7%	352	
Canoeing	3.5%	1,856	
Rowing	0.8%	404	
Windsurfing	0.3%	185	
Water skiing	0.5%	289	
Using personal watercraft	0.4%	230	
Surf/Body/Paddle Boarding	2.8%	1,501	
Surfboarding	1.2%	651	
Bodyboarding	1.3%	681	
Paddleboarding	1.1%	576	
Kitesurfing	0.1%	74	
Angling (Any)	2.4%	1,259	
Freshwater angling	1.1%	560	
Sea angling	1.7%	902	
Sea angling from a kayak	0.3%	134	
Sea angling from a rental boat	0.6%	302	
Sea angling from a charter boat	0.4%	200	
Sea angling from the shore	1.1%	561	
Recreational sea fishing	0.5%	242	
Cliff climbing	1.1%	565	
Coastal walking	14.3%	7,608	
Leisure time beach	16.9%	8,991	
Outdoor swimming	10.4%	5,557	
Leisure subaqua diving	0.8%	412	
Coasteering	0.4%	210	
Adult Population (000's)	53,258	53,258	
Sample size	12,730	12,730	

Short Term Trends

- Comparing the data from the previous 2 years we see an increase in the overall participation in 'any activity' by 3.3% points.
 - In terms of volume this is an increase of 2m people
- Whilst there is an increase in many of the activities, the major volume increases come in spending leisure time at the beach and coastal walking
- Stand up paddleboarding continues to grow in popularity, with a 0.4% point increase
- Canoeing also saw an increase in participation, with a percentage point increase of 0.6%
- The majority of activities saw increased participation on last year.
 - However small sailboat activities, kitesurfing and sea angling from the shore saw lower participation rates than in 2016

	2016		2017			% point change		000s change
	%	000s	%	000s				
Any watersports activity	27.3%	14,300	30.6%	16,318	↑	3.3	↑	2,019
Any boating activity	6.7%	3,494	7.4%	3,955	↑	0.7	↑	461
Small sailboat racing	0.3%	166	0.4%	205	↑	0.1	↑	39
Small sailboat activities	1.0%	500	0.9%	499	↓	-0.1	↓	-1
Yacht racing	0.2%	124	0.3%	155	↑	0.1	↑	30
Yacht cruising	0.7%	362	0.8%	445	↑	0.1	↑	83
Power boating	0.5%	278	0.7%	364	↑	0.2	↑	86
Motor boating	0.9%	495	1.3%	681	↑	0.4	↑	186
Canal boating	0.6%	314	0.7%	352	↑	0.1	↑	38
Canoeing	2.9%	1,512	3.5%	1,856	↑	0.6	↑	345
Rowing	0.7%	393	0.8%	404	↑	0.1	↑	11
Windsurfing	0.3%	149	0.3%	185	→	0.0	↑	36
Water skiing	0.4%	218	0.5%	289	↑	0.1	↑	71
Using personal watercraft	0.4%	229	0.4%	230	→	0.0	↑	1
Surf/Body/Paddle Boarding	2.3%	1,227	2.8%	1,501	↑	0.5	↑	274
Surfboarding	1.0%	544	1.2%	651	↑	0.2	↑	107
Bodyboarding	1.2%	608	1.3%	681	↑	0.1	↑	73
Paddleboarding	0.7%	386	1.1%	576	↑	0.4	↑	190
Kitesurfing	0.3%	139	0.1%	74	↓	-0.2	↓	-65
Angling (Any)	2.1%	1,120	2.4%	1,259	↑	0.3	↑	140
Freshwater angling	0.7%	352	1.1%	560	↑	0.4	↑	208
Sea angling	1.7%	874	1.7%	902	→	0.0	↑	27
Sea angling from a kayak	0.1%	70	0.3%	134	↑	0.2	↑	64
Sea angling from a rental boat	0.5%	258	0.6%	302	↑	0.1	↑	44
Sea angling from a charter boat	0.2%	106	0.4%	200	↑	0.2	↑	94
Sea angling from the shore	1.2%	646	1.1%	561	↓	-0.1	↓	-85
Recreational sea fishing	0.2%	131	0.5%	242	↑	0.3	↑	111
Cliff climbing	0.8%	436	1.1%	565	↑	0.3	↑	129
Coastal walking	11.7%	6,123	14.3%	7,608	↑	2.6	↑	1,485
Leisure time beach	15.2%	7,959	16.9%	8,991	↑	1.7	↑	1,033
Outdoor swimming	9.7%	5,100	10.4%	5,557	↑	0.7	↑	456
Leisure subaqua diving	0.6%	305	0.8%	412	↑	0.2	↑	108
Coasteering	0.4%	188	0.4%	210	→	0.0	↑	23
Adult Population (000's)	52,443	52,443	53,258	53,258				
Sample size	12625	12,625	12,730	12,730				

Long Term Trends

- Comparing the data in the long term, in this case, looking at the participation rates from 2007. Although the participation rates for 'any boating activity' saw a decrease, the volume of people taking part have increased in the past 10 years due to the increase in population size. Both the percentage and volume of people participating in 'any activity' have increased
- Both canoeing and rowing within the 'any boating activity' have seen an increase over the 10 year period

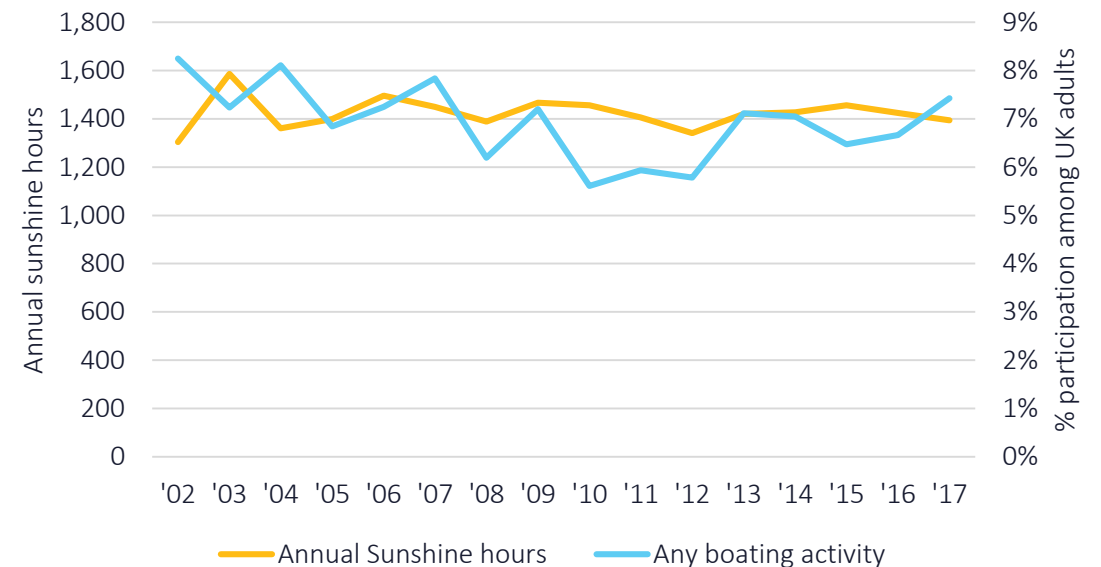
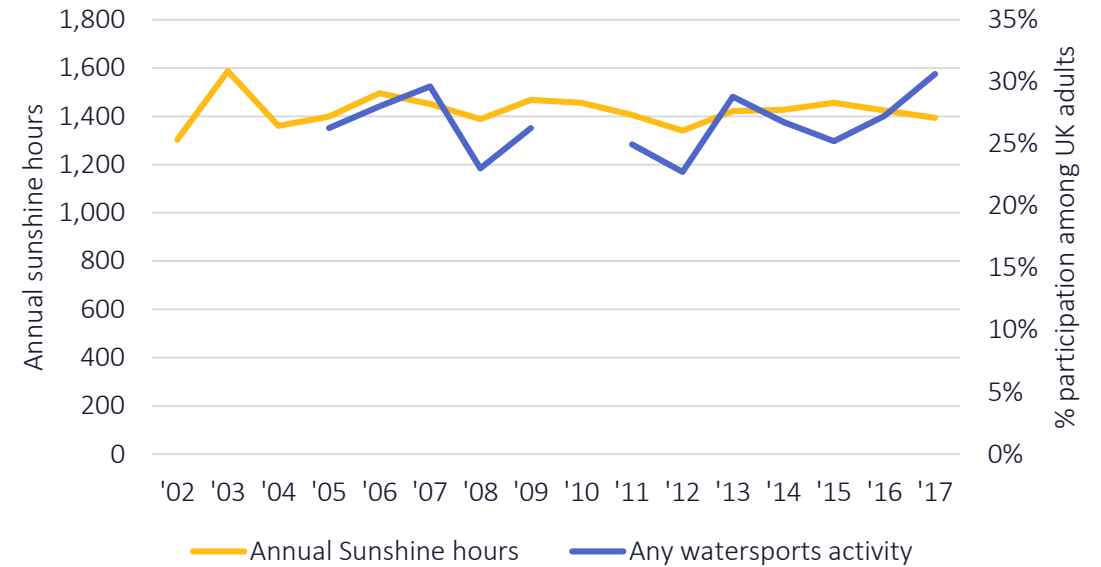
	2007		2017			% point change		000s change
	%	000s	%	000s				
Any watersports activity	29.6%	14,400	30.6%	16,318	↑	1.0	↑	1,918
Any boating activity	7.8%	3,811	7.4%	3,955	↓	-0.4	↑	145
Small sailboat racing	0.5%	234	0.4%	205	↓	-0.1	↓	-29
Small sailboat activities	1.2%	562	0.9%	499	↓	-0.3	↓	-63
Yacht racing	0.3%	155	0.3%	155	→	0.0	↓	-1
Yacht cruising	0.8%	400	0.8%	445	→	0.0	↑	45
Power boating	0.7%	350	0.7%	364	→	0.0	↑	14
Motor boating	1.4%	691	1.3%	681	↓	-0.1	↓	-10
Canal boating	1.0%	490	0.7%	352	↓	-0.3	↓	-138
Canoeing	2.2%	1,051	3.5%	1,856	↑	1.3	↑	806
Rowing	0.7%	332	0.8%	404	↑	0.1	↑	72
Windsurfing	0.5%	235	0.3%	185	↓	-0.2	↓	-50
Water skiing	0.8%	381	0.5%	289	↓	-0.3	↓	-93
Using personal watercraft	0.6%	273	0.4%	230	↓	-0.2	↓	-43
Surf/Body/Paddle Boarding	1.2%	607	2.8%	1,501	↑	1.6	↑	894
Surfboarding			1.2%	651				
Bodyboarding			1.3%	681				
Paddleboarding			1.1%	576				
Kitesurfing	0.2%	88	0.1%	74	↓	-0.1	↓	-14
Angling (Any)			2.4%	1,259				
Freshwater angling			1.1%	560				
Sea angling			1.7%	902				
Sea angling from a kayak			0.3%	134				
Sea angling from a rental boat			0.6%	302				
Sea angling from a charter boat			0.4%	200				
Sea angling from the shore			1.1%	561				
Recreational sea fishing			0.5%	242				
Cliff climbing	1.0%	496	1.1%	565	↑	0.1	↑	69
Coastal walking	13.3%	6,475	14.3%	7,608	↑	1.0	↑	1,133
Leisure time beach	13.1%	6,368	16.9%	8,991	↑	3.8	↑	2,623
Outdoor swimming	11.4%	5,562	10.4%	5,557	↓	-1.0	↓	-6
Leisure subaqua diving	0.9%	423	0.8%	412	↓	-0.1	↓	-11
Coasteering			0.4%	210				
Adult Population (000's)	48,607	48,607	53,258	53,258				
Sample size	12430	12,430	12,730	12,730				

WIDER MARKET FACTORS



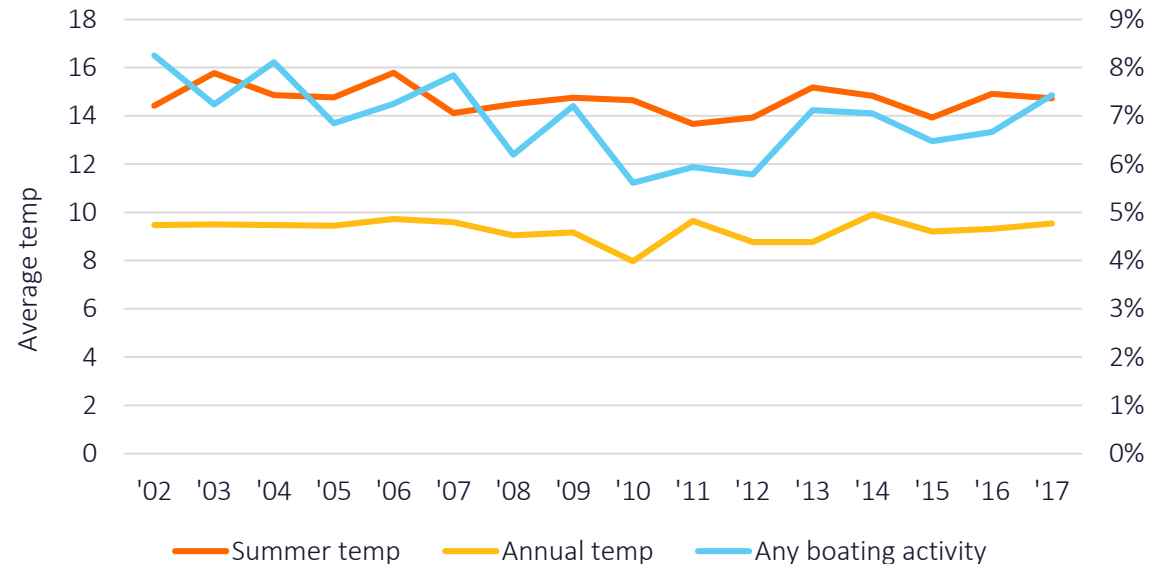
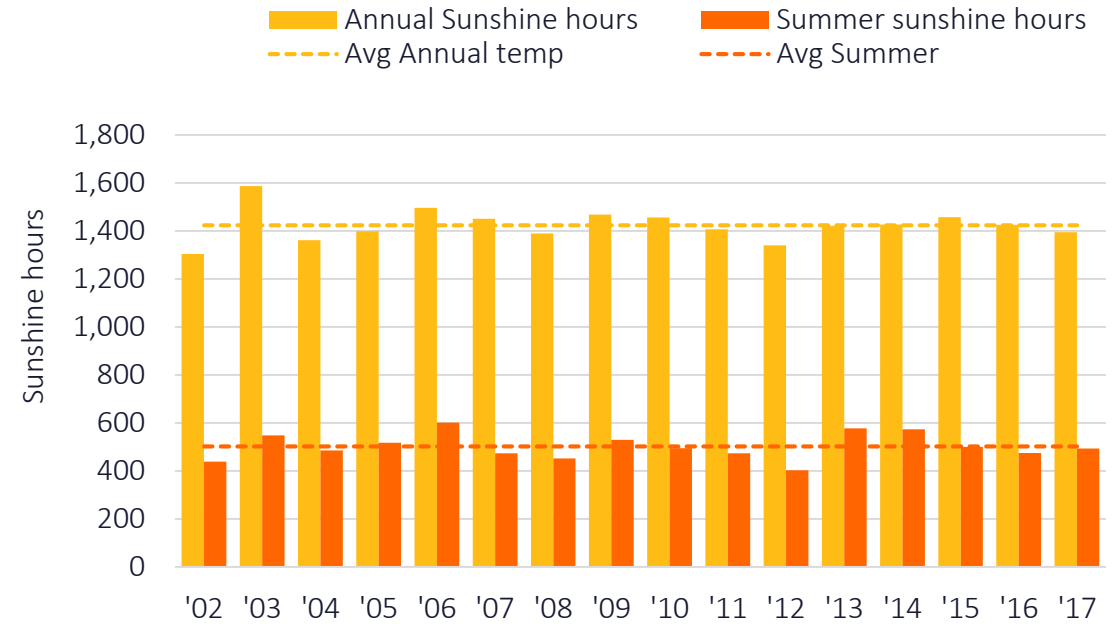
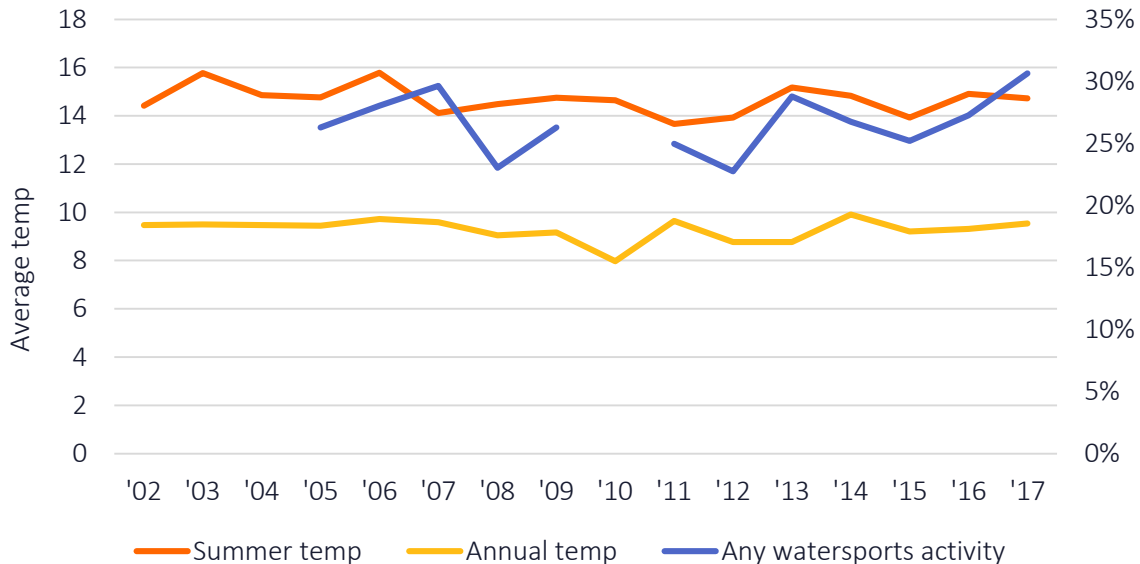
Importance of the weather?

- 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 to the right show the participation rates alongside sunshine hours
- When looking at the top graph, 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, this year saw a slight decrease in annual sunshine hours and an increase in overall participation
- The 'any boating participation' graph on the bottom shows less correlation between the 2 data sets

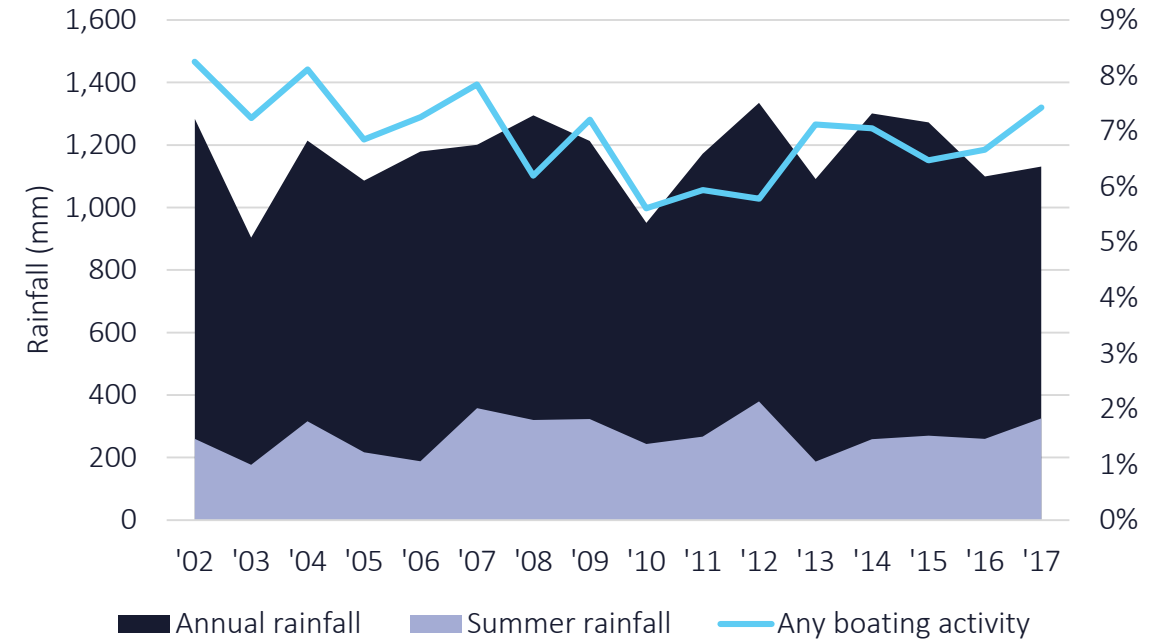
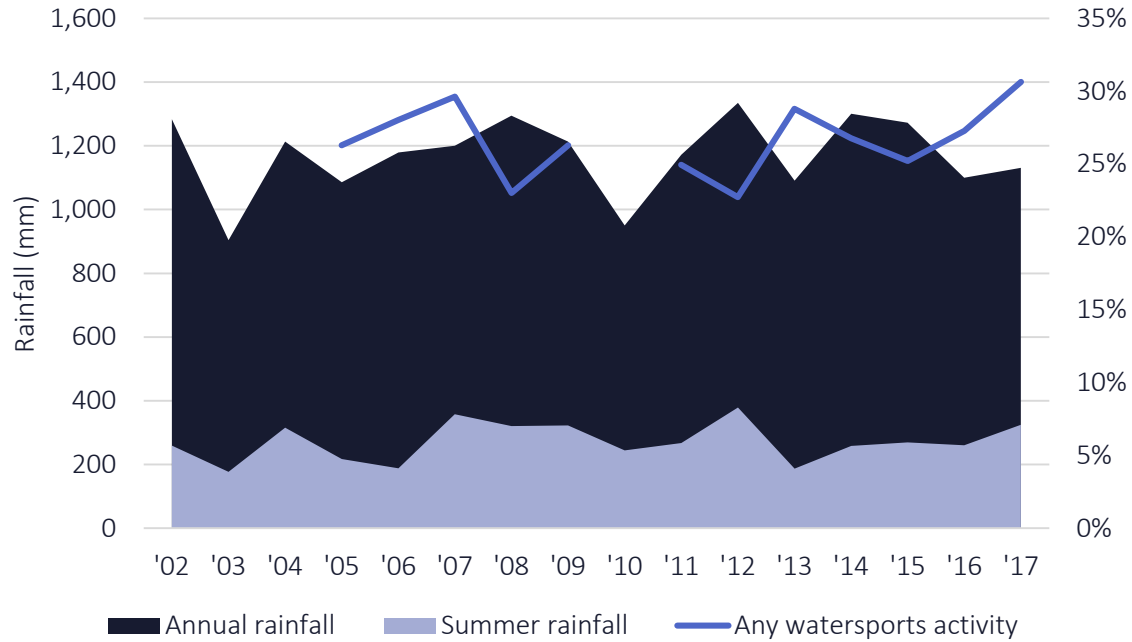


Sunshine and Temperature

- Although the average sunshine hours in summer was slightly under average, both the annual and summer temperatures were high
- 'Any watersport activity' is tied strongly with the temperature – when it gets hotter lots of people head to the beach and coast

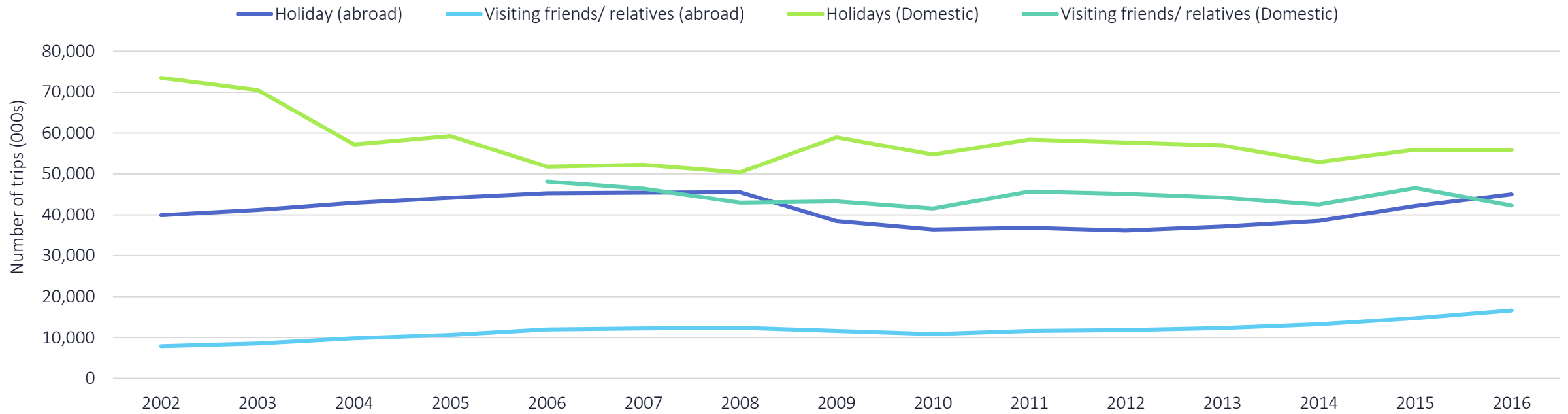


Rainfall



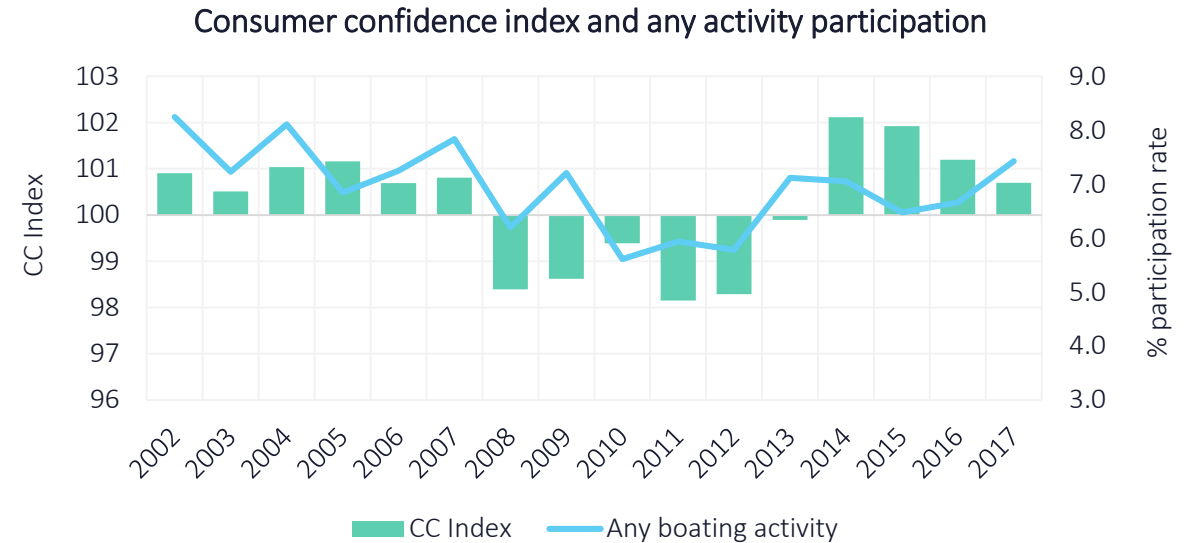
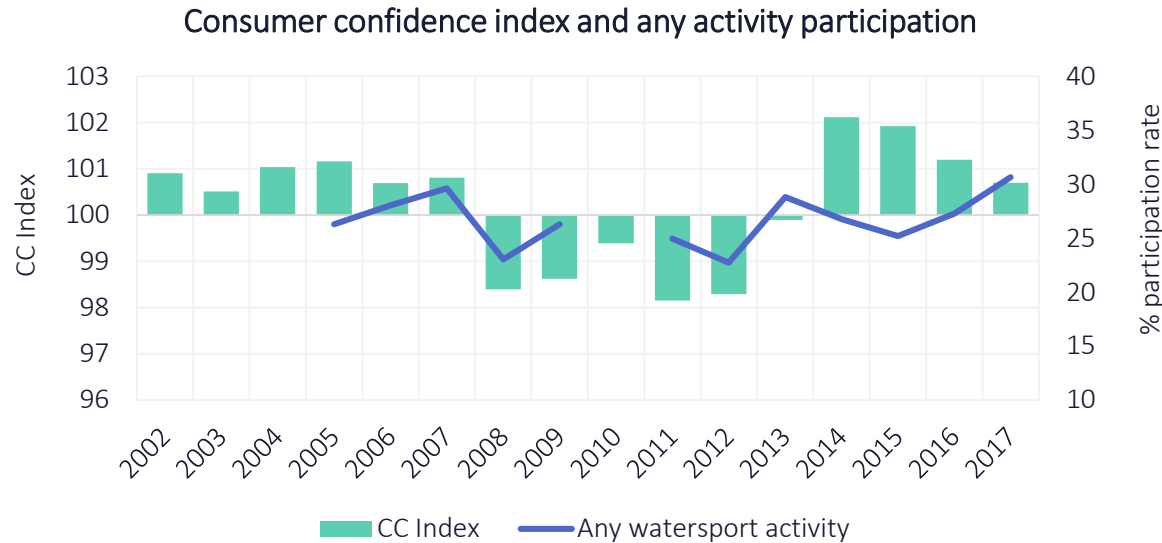
- 2017 saw an increase in the summer rainfall compared to the past 4 years, but the annual rainfall was fairly consistent with 2016
- The slightly higher precipitation level in summer has not impacted participation in ‘any watersport’ or ‘any boating activity’, which have both increased. Though participation in the summer months has decreased, possibly as a result.

Importance of holidays?



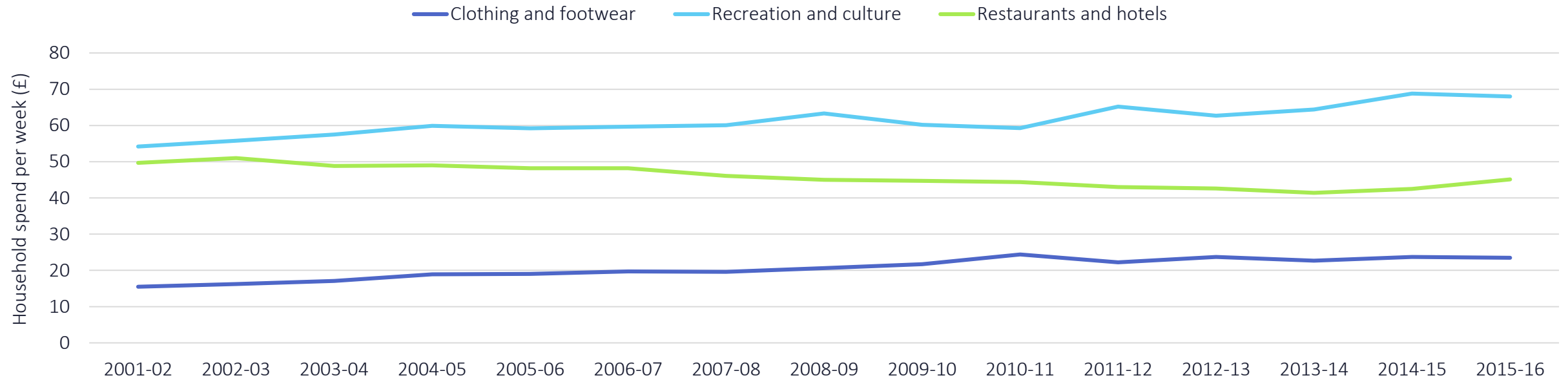
- Holiday taking abroad has been on the increase since 2012 while holidaying in the UK remains relatively steady
- From other research that we undertake in the tourism industry, we know that people are being more active on holidays – not necessary physical activities, but wanting to fill their time
- While British holiday makers are still confused about the impact that Brexit will have on their holiday taking they are still committed to travelling to Europe, with 63% of Brits planning to travel to Europe in 2018

Consumer Confidence



- 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. This measures how optimistic or pessimistic consumers are
- The idea is that if the consumers are optimistic they will tend to purchase more goods and services
- Looking at the long term trends however show some correlation, especially when looking at boating participation
- Although consumer confidence has been dropping since 2014, both 'any watersport activity' and 'any boating activity' participation has been increasing since 2015

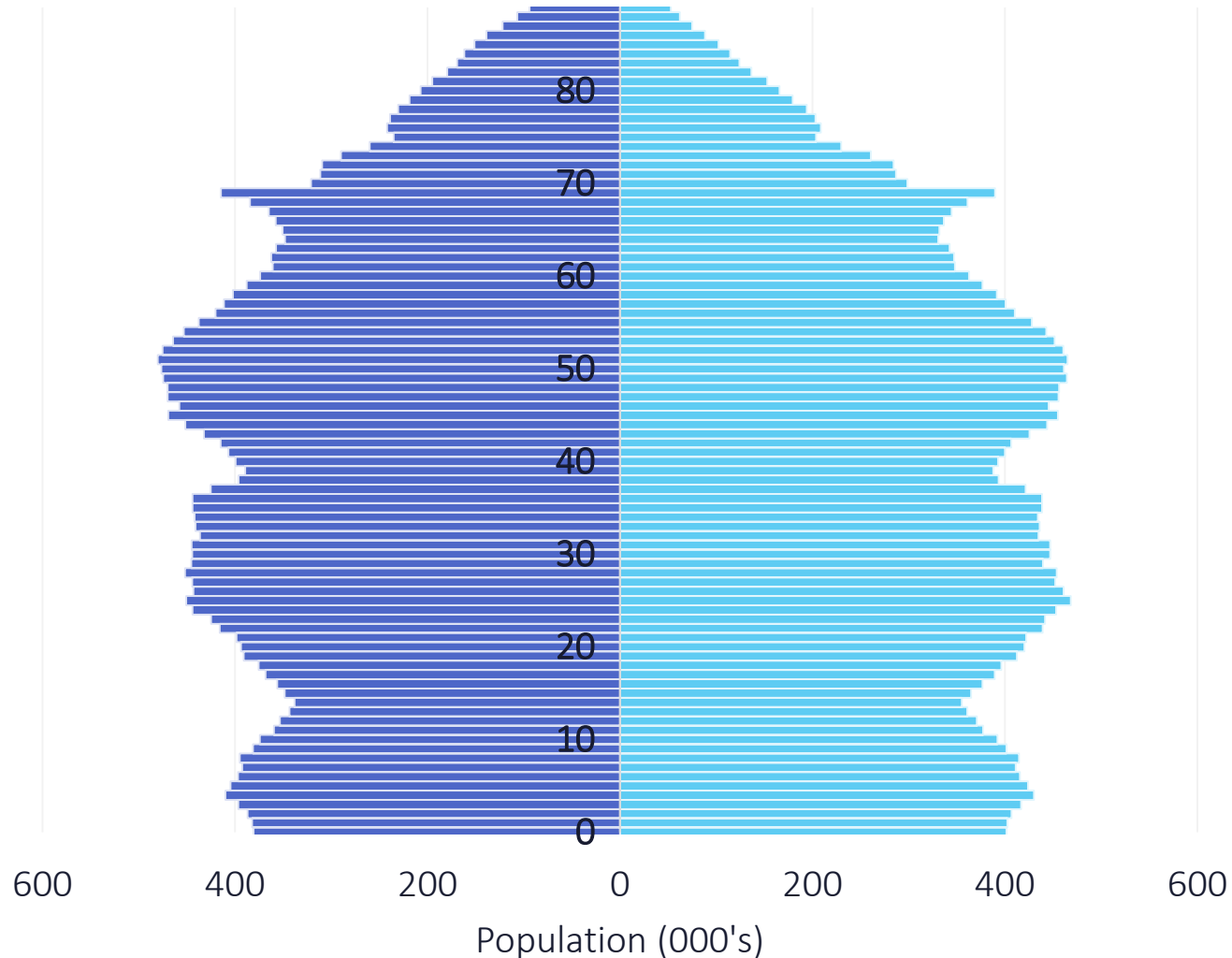
Recreational and Culture Spend



- 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
- As we have just seen with the consumer confidence index, spending confidence is dropping and this is reflected in spend on recreation and culture

The Aging Population

■ Females ■ Males

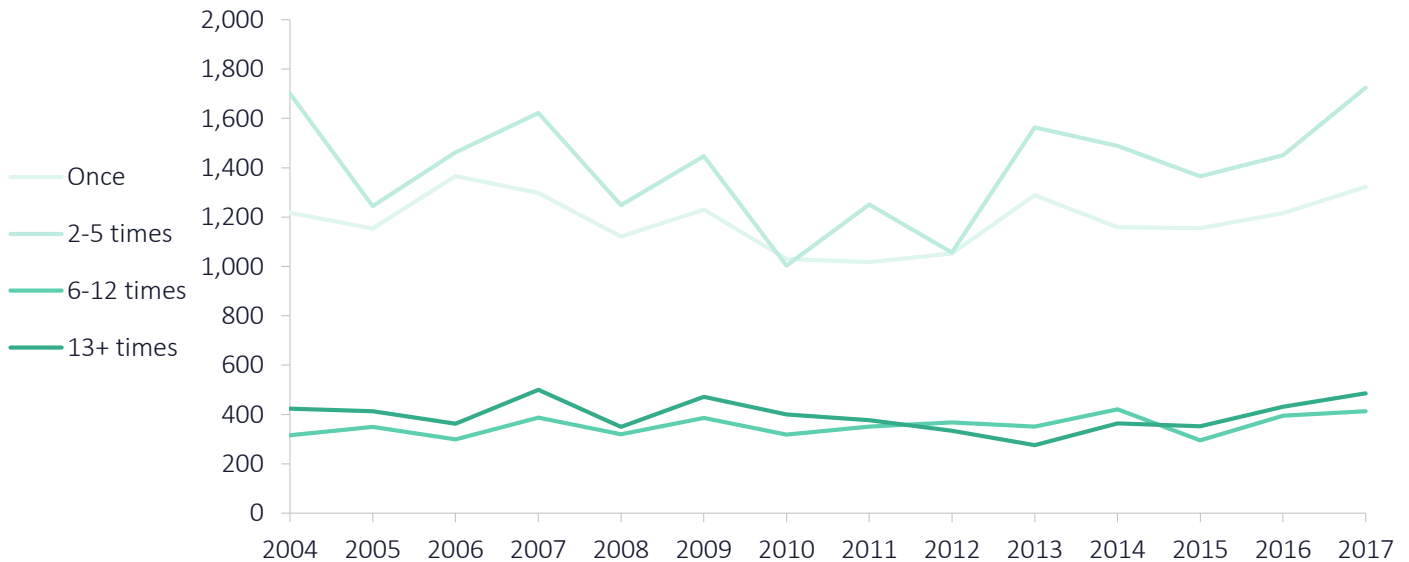
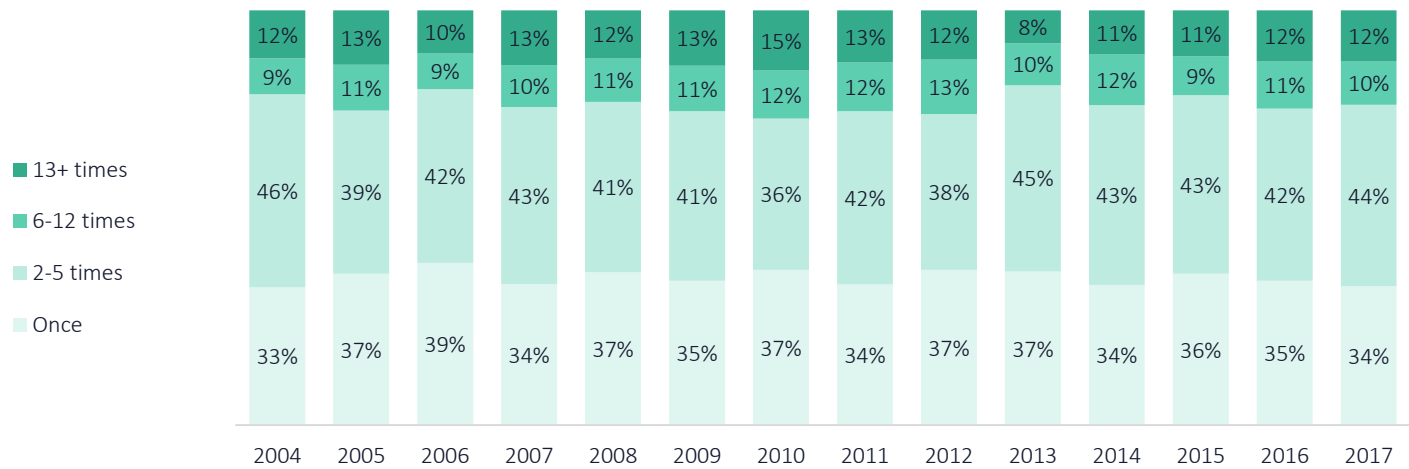


- We have known that the population is getting older as people live longer
- The chart shows the peaks and troughs of the population profile by age
- The peaks are getting smaller each time
- There is currently a trough between the age of 10 and 15 meaning there are fewer children to get into watersports than 10 years ago
 - This could have implications for participation years down the line

SUMMARY OF PARTICIPATION



Proportion of Boating Participants by Frequency



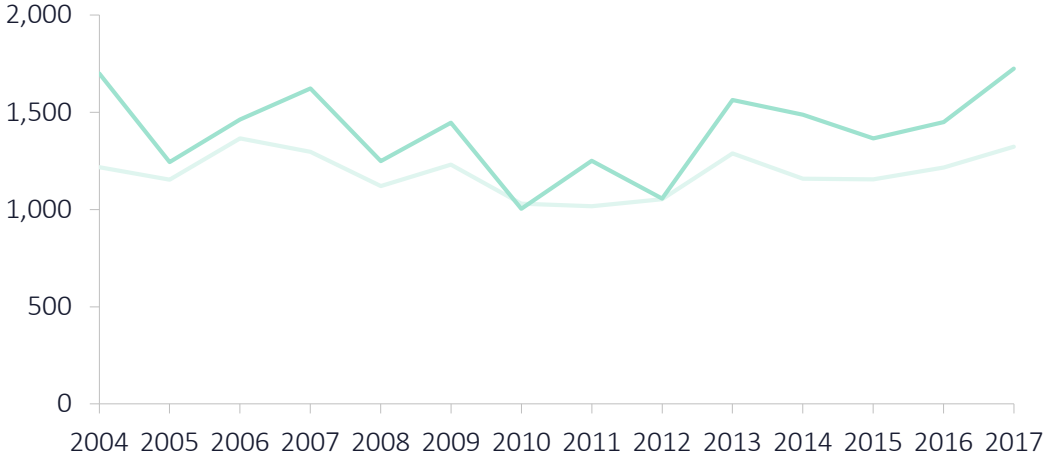
- The difference in casual and enthusiastic boaters has stayed fairly consistent this year
- The percentage of enthusiasts has very slightly decreased since last year. The volume of both casual participants and frequent participants has increased on last year
- The volume of enthusiasts has remained fairly consistent whereas the volume of casual participants fluctuates much more

Casual Boating Participation

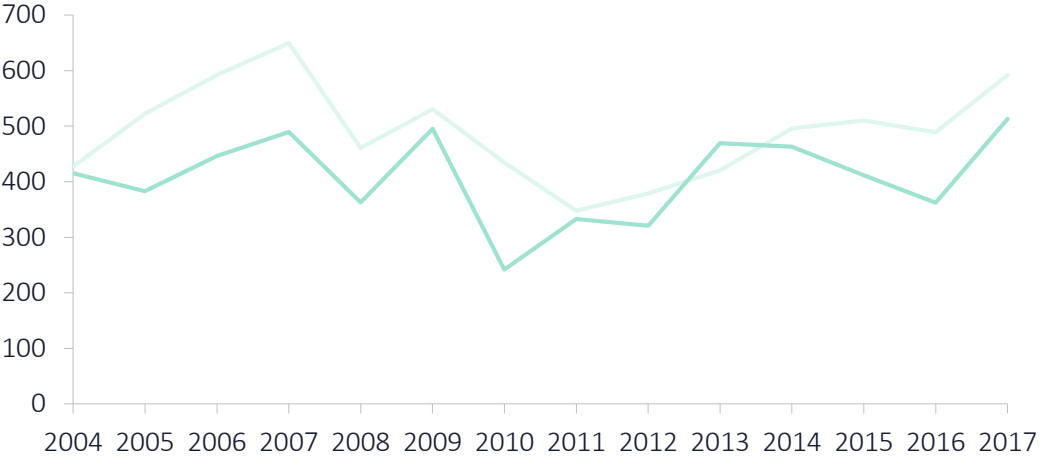
Once —
 2-5 times —

All graphs show participation in 000s

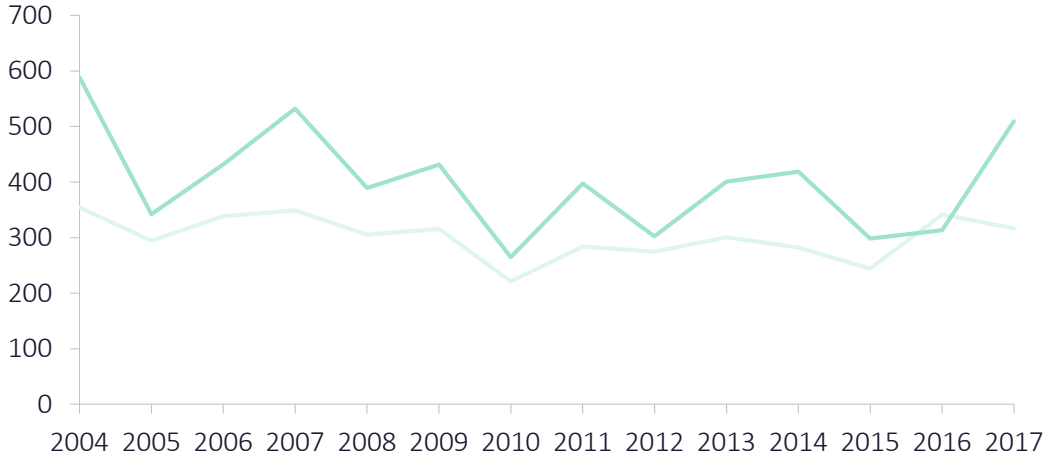
Any Boating



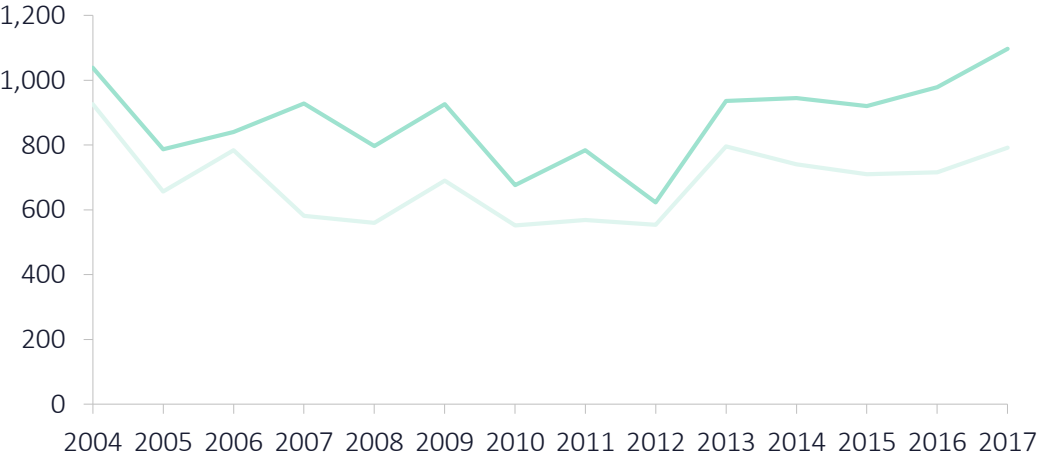
Any Power



Any Sailing



Any Manual

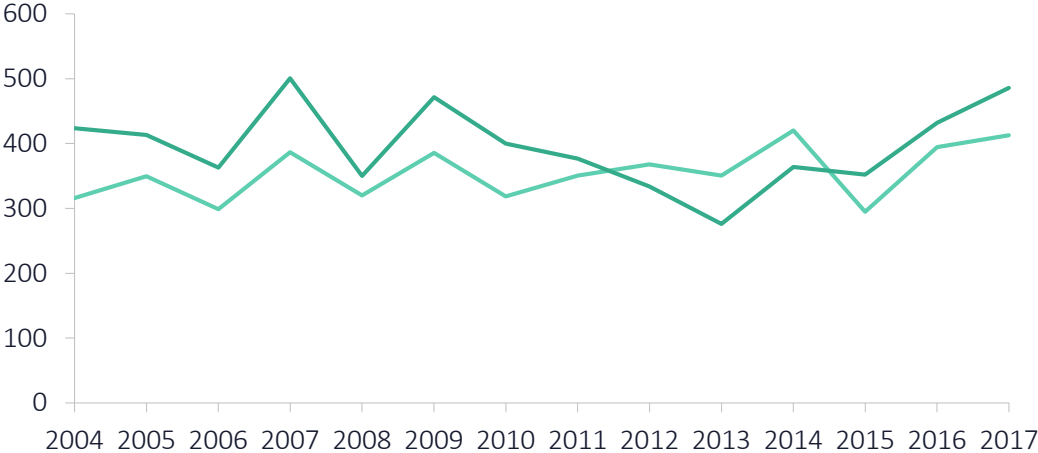


Enthusiast Boating Participation

6-12 times 
 13+ times 

All graphs show participation in 000s

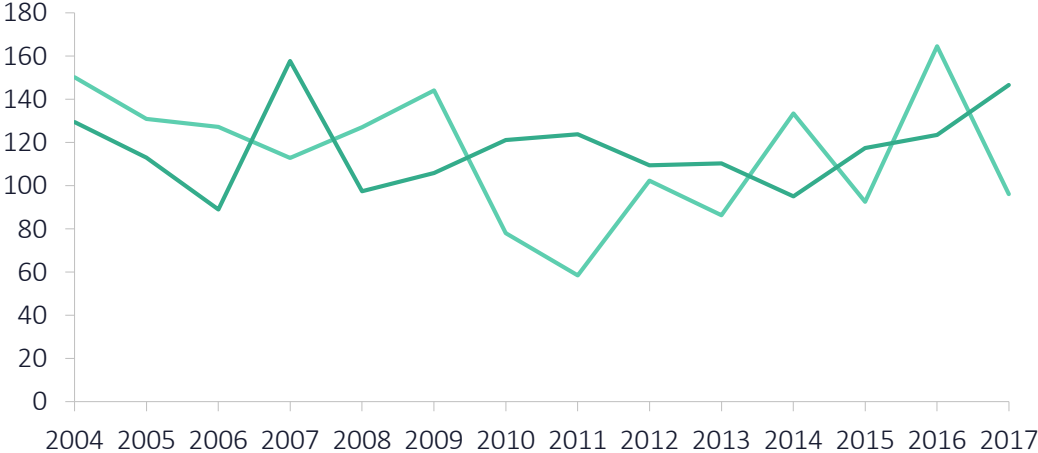
Any Boating



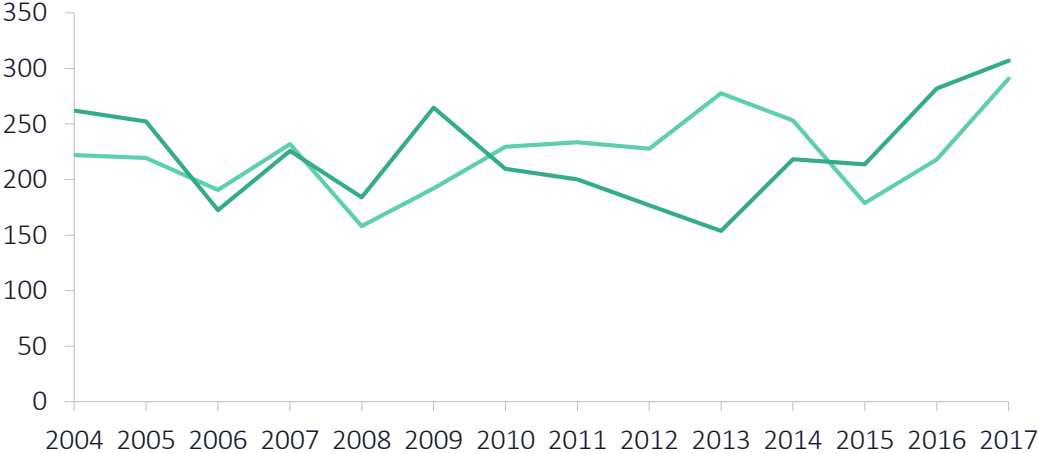
Any Power



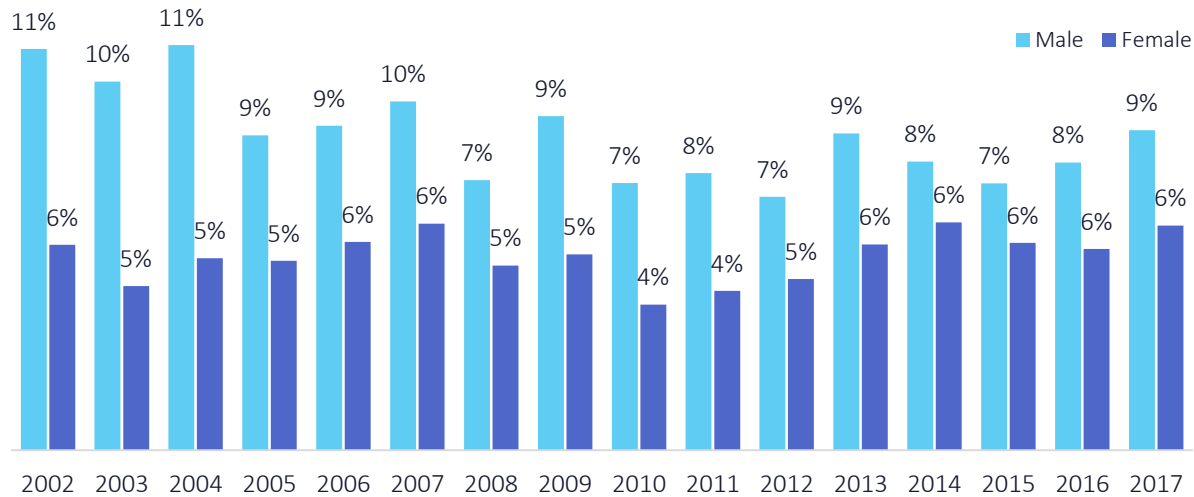
Any Sailing



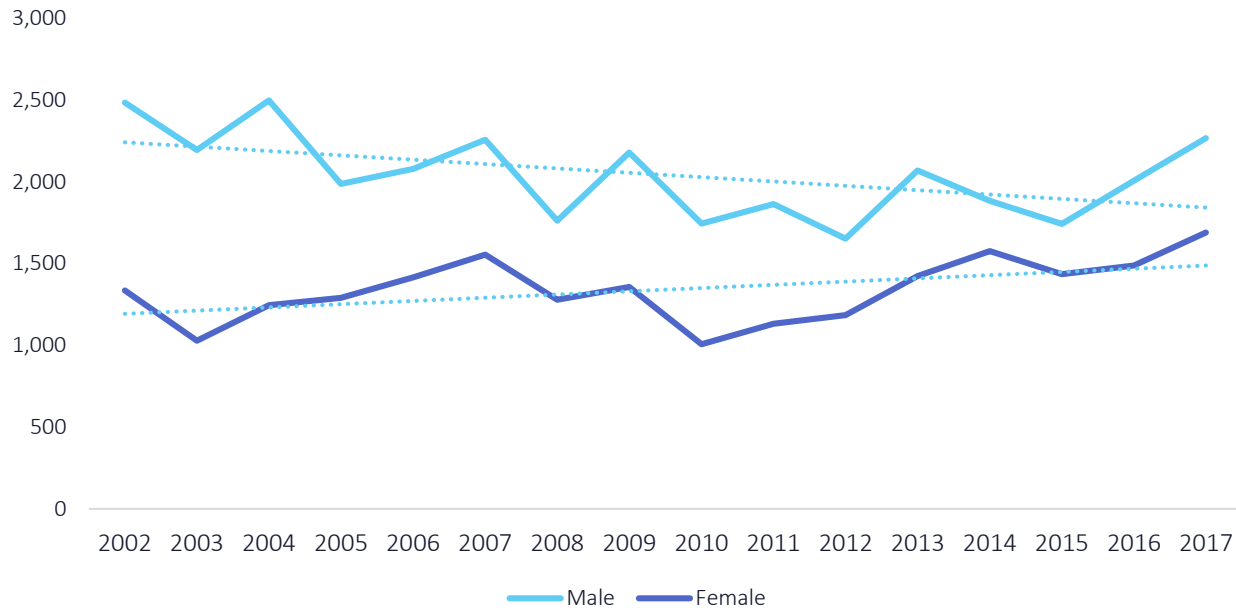
Any Manual



Participation by Gender – Any Boating



- The table and graph show trends in ‘any boating activity’ for each of the genders
- Although male participation has increased for the past 2 years, the overall trend is still downward
- The gap between male and female participation continues to show a narrowing trend, with the number of females participating increasing and the number of males decreasing

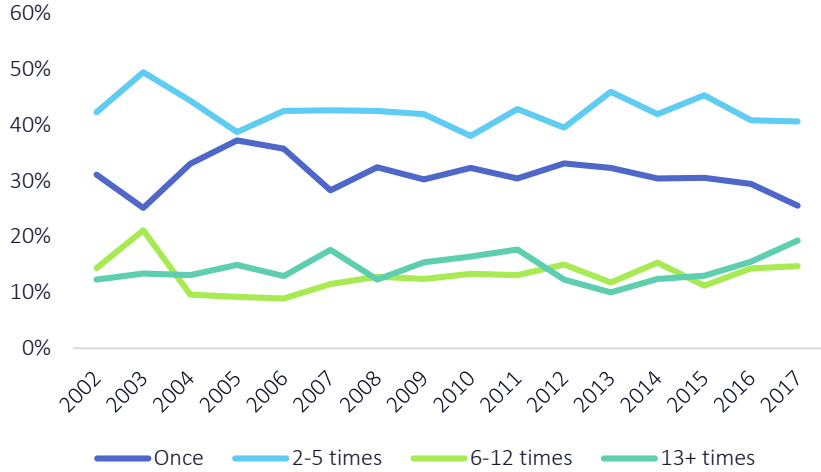


Frequency by Gender – Any Boating

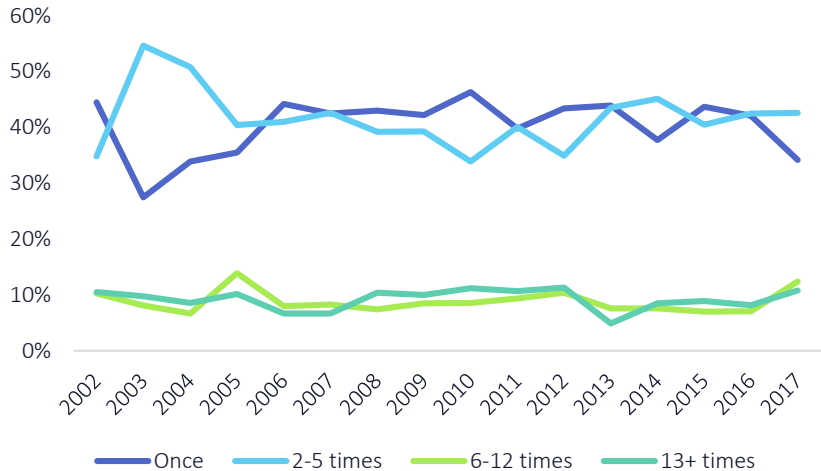
	Males					Females				
	Once	2-5 times	6-12 times	13+ times	Sample	Once	2-5 times	6-12 times	13+ times	Sample
2002	31.1%	42.3%	14.4%	12.3%	264	44.5%	34.8%	10.3%	10.5%	157
2003	25.1%	49.4%	21.1%	13.4%	240	27.5%	54.6%	8.1%	9.8%	130
2004	33.0%	44.3%	9.6%	13.1%	235	33.9%	50.8%	6.7%	8.6%	148
2005	37.2%	38.7%	9.2%	14.9%	409	35.5%	40.4%	13.9%	10.2%	302
2006	35.7%	42.5%	8.9%	12.9%	446	44.2%	41.0%	8.0%	6.7%	364
2007	28.3%	42.6%	11.5%	17.6%	465	42.5%	42.6%	8.3%	6.7%	386
2008	32.4%	42.5%	12.8%	12.3%	379	43.0%	39.2%	7.4%	10.4%	301
2009	30.2%	41.9%	12.4%	15.4%	470	42.2%	39.3%	8.5%	10.0%	317
2010	32.3%	38.0%	13.3%	16.4%	382	46.3%	33.9%	8.6%	11.2%	231
2011	30.4%	42.8%	13.1%	17.7%	809	39.8%	40.1%	9.4%	10.7%	554
2012	33.1%	39.5%	15.0%	12.3%	370	43.4%	34.9%	10.4%	11.3%	300
2013	32.3%	45.9%	11.8%	10.0%	469	43.9%	43.5%	7.6%	4.9%	329
2014	30.4%	41.9%	15.3%	12.4%	393	37.7%	45.1%	7.6%	8.5%	359
2015	30.5%	45.3%	11.2%	13.0%	388	43.7%	40.5%	7.0%	8.9%	326
2016	29.4%	40.8%	14.3%	15.5%	401	42.1%	42.5%	7.1%	8.2%	324
2017	25.5%	40.6%	14.7%	19.3%	458	34.2%	42.6%	12.4%	10.8%	357

66.1%
34.0%
76.8%
23.2%

Males

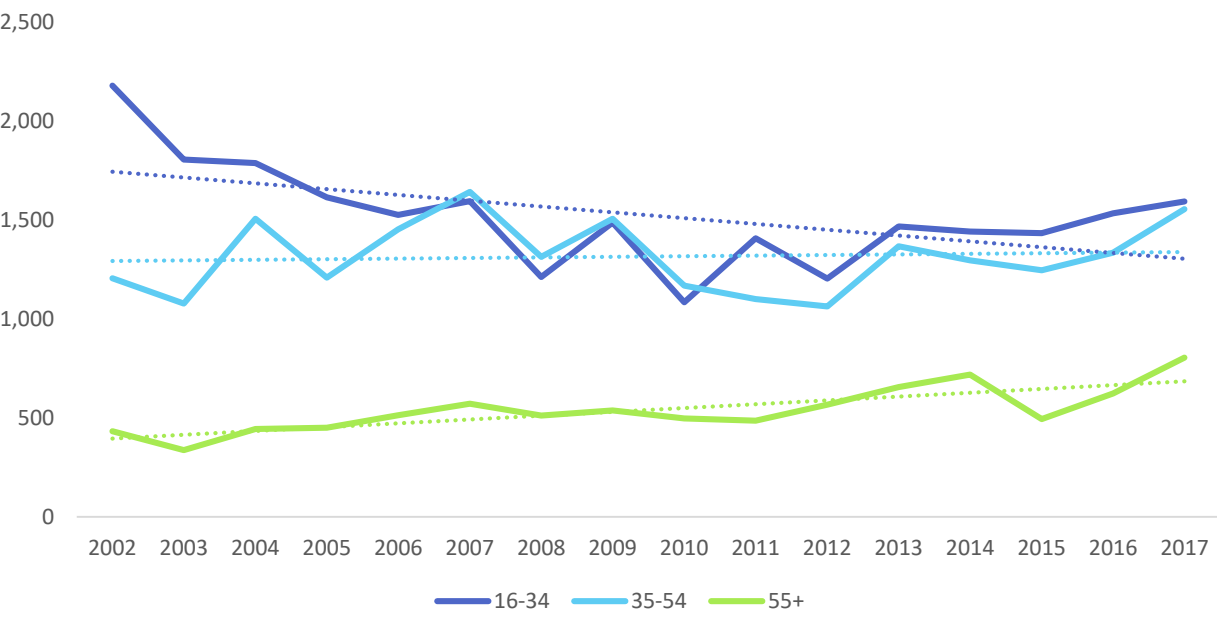
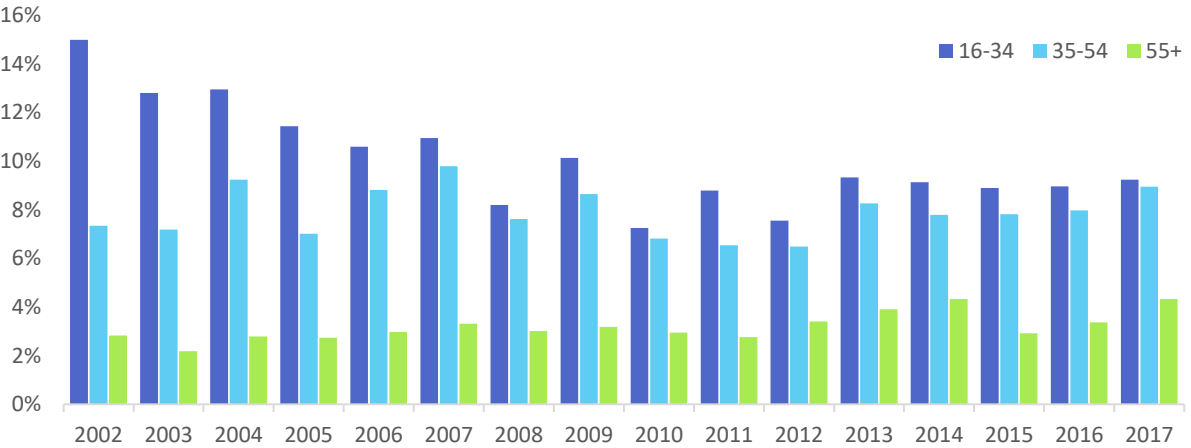


Females



- Males are more likely to be enthusiasts than females with 34% of males participating more than 6 times compared to 23% for females. The percentage of enthusiasts (both male and female) has increased since last year
- The number of both males and females participating 13+ times has also increased

Participation by Age – Any Boating

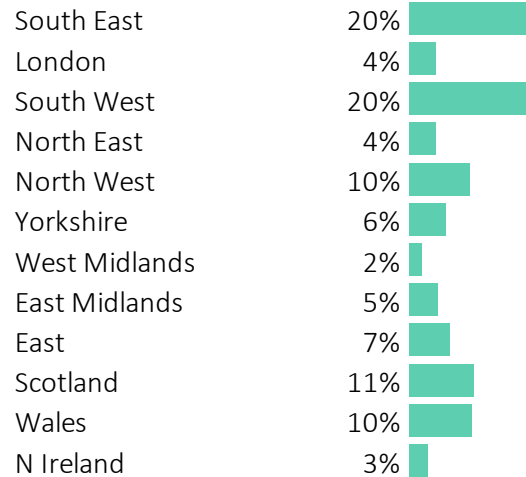
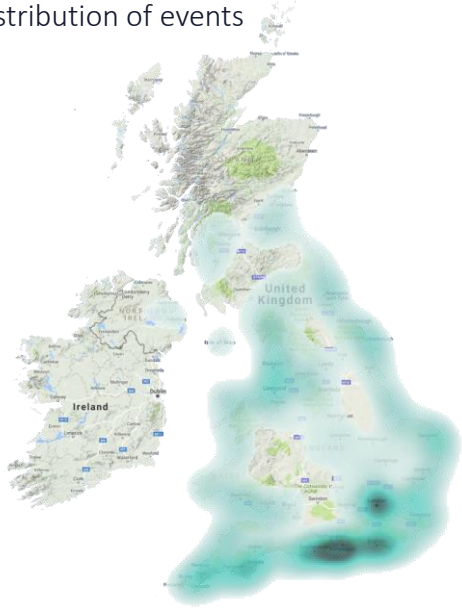


- Historically it is the younger age groups that show the most fluctuations but the last few years have stayed fairly consistent and participation rates across all age groups have remained fairly consistent for the past few years
- Participation in ‘any boating activity’ for both 16-34 year olds and 35-55 year olds is around the 1.5m mark
- The participation rates for over 55s have returned to the 2014 high of 4.3% and the volume of over 55s participating is the highest since the survey began (758,000)

Distribution of Participation

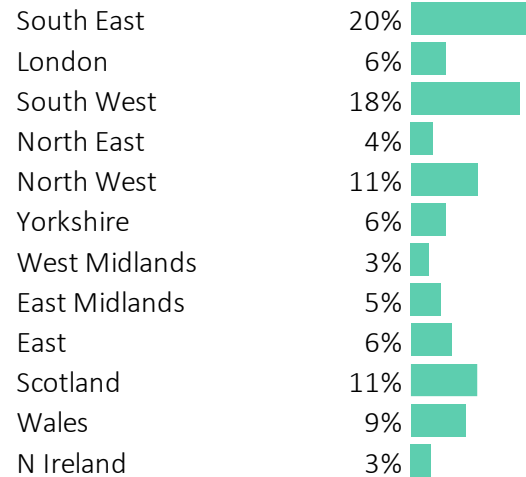
Any activity

Distribution of events



Boating activity

Distribution of events



- For the 4th 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 2015-2017
- 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, the North West and around Birmingham
- For 'any boating activity' the pattern is very similar with the south coast dominating participation
 - London, Birmingham, the Peak District and the Lake District are showing as popular areas for participation

BOAT OWNERSHIP



Boat Ownership Trends

	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017
Any boat	2.68%	2.52%	2.65%	2.82%	2.73%	2.69%	2.58%	2.55%	2.61%
Small sailing boat	0.62%	0.51%	0.55%	0.65%	0.63%	0.63%	0.55%	0.54%	0.50%
Sailing yacht	0.26%	0.24%	0.23%	0.24%	0.23%	0.19%	0.21%	0.19%	0.22%
Power boat	0.25%	0.22%	0.20%	0.18%	0.17%	0.17%	0.17%	0.16%	0.16%
Motor boat	0.38%	0.38%	0.37%	0.34%	0.25%	0.30%	0.27%	0.28%	0.28%
Canal boat	0.09%	0.07%	0.09%	0.15%	0.14%	0.11%	0.12%	0.10%	0.11%
Canoe/ Kayak	0.85%	0.91%	1.00%	1.05%	1.12%	1.21%	1.18%	1.23%	1.29%
Rowing boat	0.13%	0.10%	0.11%	0.16%	0.14%	0.13%	0.13%	0.14%	0.10%
RIBs/ Inflatables or sports boats	0.18%	0.15%	0.31%	0.17%	0.17%	0.15%	0.12%	0.11%	0.13%
Windsurfer	0.29%	0.28%	0.25%	0.20%	0.21%	0.21%	0.18%	0.18%	0.18%
Personal Watercraft	0.15%	0.11%	0.12%	0.15%	0.12%	0.09%	0.09%	0.10%	0.10%

- Boat ownership tends to fall between 2.5% and 2.9%; for 2015-2017 boat ownership was at 2.6%
- Consumer confidence has been declining over the past 3 years, which tends to impact boat ownership
- Canoes and Kayaks remain the most widely owned of all the craft types, which is unsurprising given the lower cost of entry and easier storage options. The proportion of people owning one is at its highest level (1.3%) since the beginning of the survey

Boat Ownership Trends - Detailed

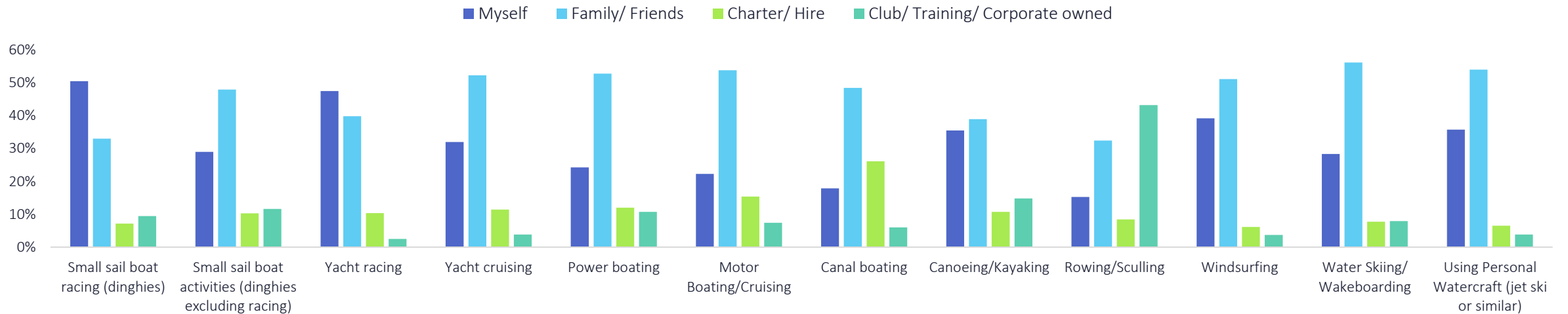
	2012-2014			2013-2015			2014-2016			2015-2017		
	Number of boats owned by households	Number of boat owning households	% kept in the UK	Number of boats owned by households	Number of boat owning households	% kept in the UK	Number of boats owned by households	Number of boat owning households	% kept in the UK	Number of boats owned by households	Number of boat owning households	% kept in the UK
Any boat	1,214,154	712,530	94.5%	1,130,266	681,644	95.4%	1,147,265	674,268	95.5%	1,185,243	690,415	94.9%
Small sailing boat	204,670	165,431	94.9%	178,433	146,017	93.5%	171,057	142,821	95.1%	166,625	132,107	91.1%
Sailing yacht	54,246	50,540	95.4%	58,110	55,227	91.6%	52,266	49,607	93.1%	60,798	58,611	89.5%
Power boat	46,550	44,903	86.5%	44,540	44,540	91.6%	45,193	41,243	84.4%	46,738	42,896	85.8%
Motor boat	82,799	78,573	94.7%	80,249	72,502	91.6%	83,798	73,863	88.2%	82,050	73,320	90.1%
Canal boat	28,814	28,814	97.1%	33,056	30,900	100.0%	27,917	25,780	96.6%	31,702	29,654	94.7%
Canoe/kayak	573,614	320,717	95.9%	530,642	312,320	96.9%	547,729	324,163	97.7%	581,338	341,526	98.1%
Rowing boat	41,450	33,868	90.8%	42,542	33,942	93.8%	45,330	37,469	94.4%	34,751	27,448	93.7%
RIBs/Inflatables or sportsboats	47,086	39,187	92.0%	37,069	31,988	97.6%	34,962	29,549	93.0%	40,472	33,118	91.9%
Windsurfer	100,917	54,953	93.4%	90,619	46,430	91.1%	104,381	46,847	96.2%	96,258	47,525	97.2%
Personal Watercraft	34,008	24,357	88.7%	35,006	23,081	93.1%	34,633	25,901	90.5%	41,392	27,712	91.9%

- After a downward trend in the number of households owning a boat, this year has seen an increase. The number of boats owned per household has remained relatively consistent over previous years
- 1,185,243 boats were recorded per year on average for the years 2015 to 2017. An increase of approximately 38,000 on the earlier 3 year period
- Canoes and Kayaks continue to be the most popular of the boats, making up 33% of ownership (roughly the same figure for 2013-15 and 2014-2016)

Boat Ownership by Activity

	Myself	Family/ Friends	Charter/ Hire	Club/ Training/ Corporate owned	Base
Small sail boat racing (dinghies)	50%	33%	7%	9%	200
Small sail boat activities (dinghies excluding racing)	29%	48%	10%	12%	376
Yacht racing	47%	40%	10%	3%	122
Yacht cruising	32%	52%	11%	4%	268
Power boating	24%	53%	12%	11%	312
Motor Boating/Cruising	22%	54%	15%	7%	483
Canal boating	18%	48%	26%	6%	589
Canoeing/Kayaking	35%	39%	11%	15%	752
Rowing/Sculling	15%	32%	8%	43%	339
Windsurfing	39%	51%	6%	4%	200
Water Skiing/ Wakeboarding	28%	56%	8%	8%	249
Using Personal Watercraft (jet ski or similar)	36%	54%	7%	4%	284

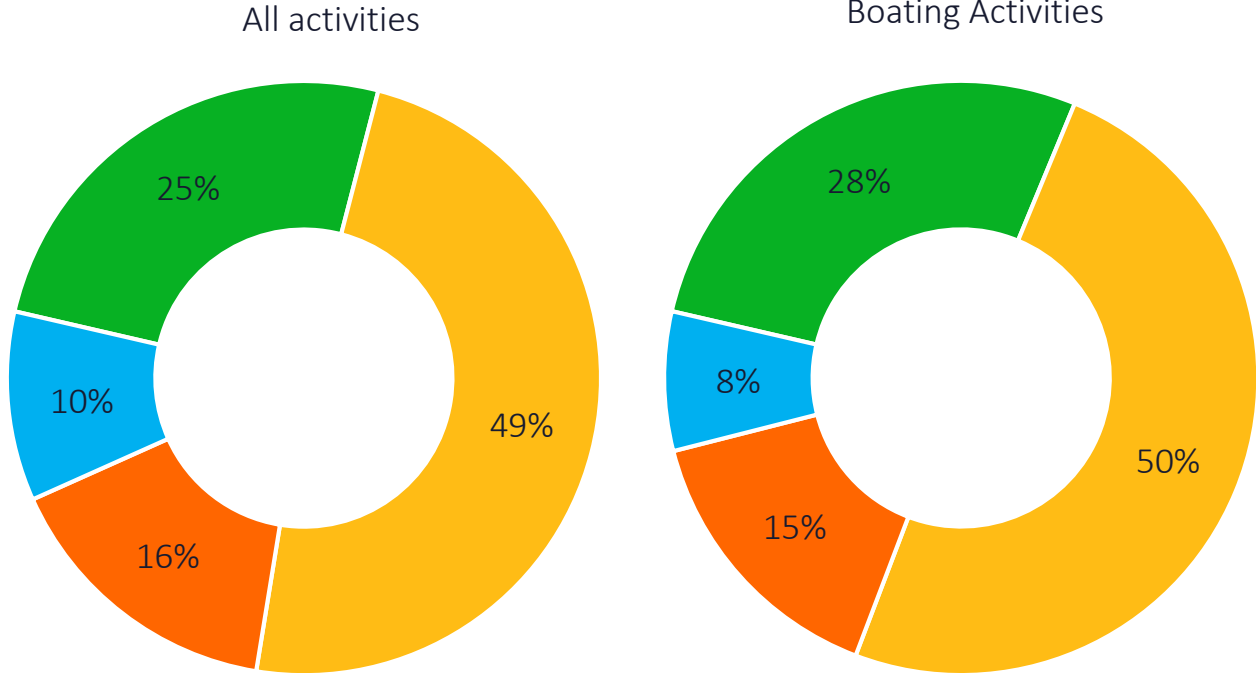
- For the majority of the activities, going on a friend or family member's boat was most popular
- For small sailboat racing and yacht racing they were more likely to have done the activity on their own boat
- Rowing/ sculling was most likely to be carried out using a club/ training or corporate owned boat



BESPOKE QUESTIONS



Seasonal Participation

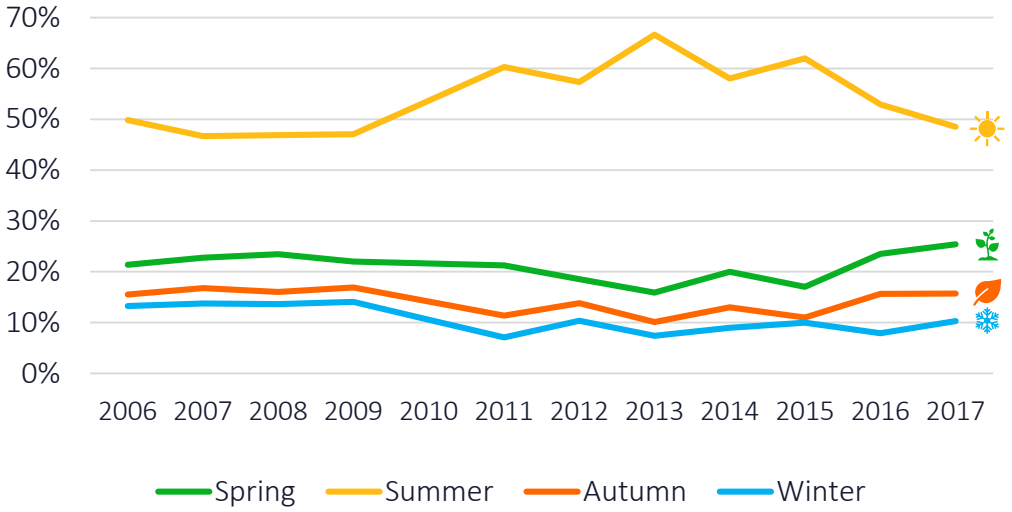


	Spring	March - May
	Summer	June - August
	Autumn	September - October
	Winter	December - February

- Summer participation has continued to drop, from 53% last year to 49% this year
- Summer participation in boating activities decreased from 61% in 2015 to 51% in 2016 and again to 50% in 2017. With more than a quarter now participating in the Spring
- Participation in 'any activity' in winter has increased from 8% to 10%, but people are still least likely to participate in the colder months

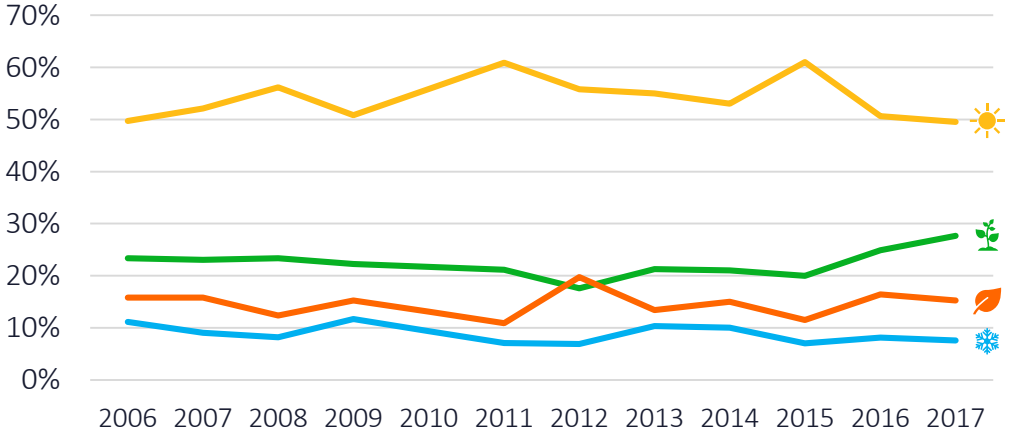
Seasonal Trends

All Activities

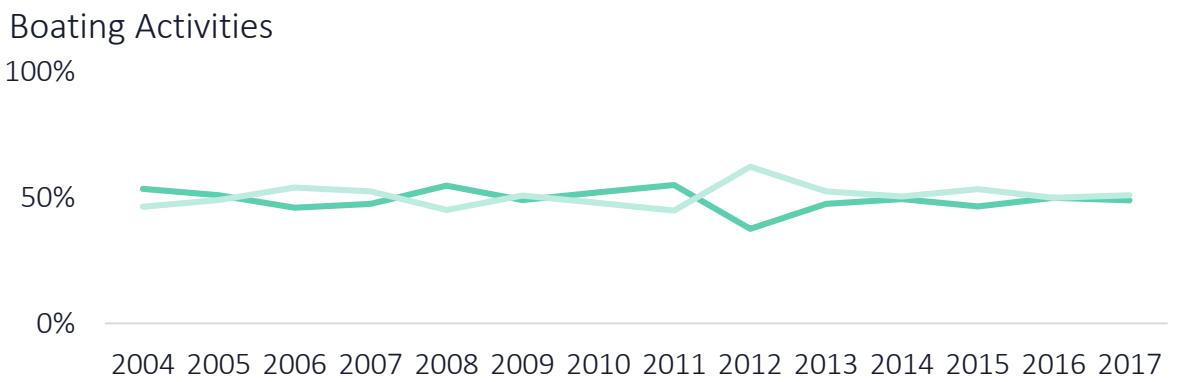
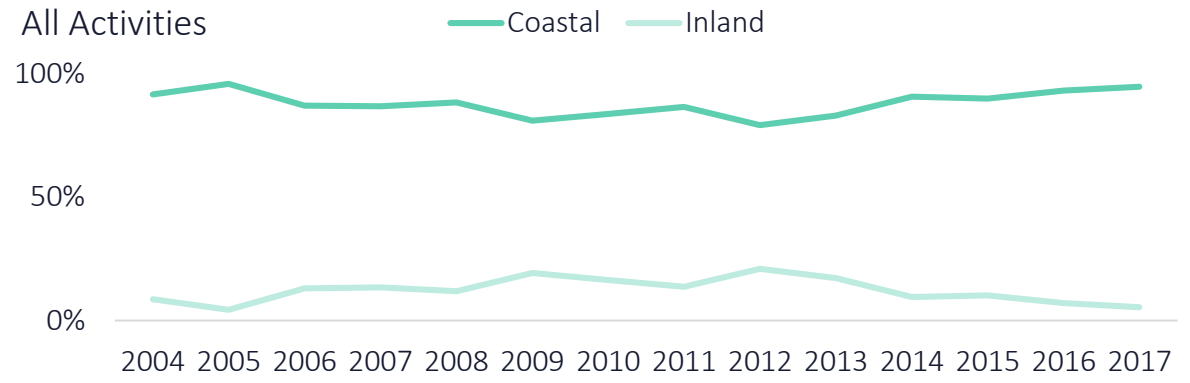
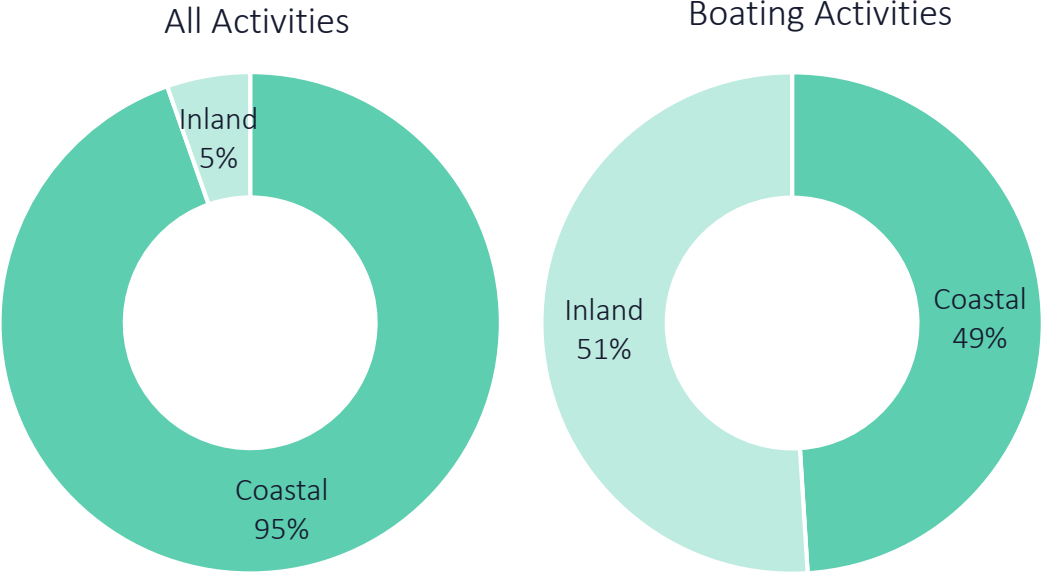


- Summer participation rates for ‘any activity’ have dropped considerably over the past two years and they are at their lowest recovered level
- This year has seen an increase in participation rates for all other seasons, but most noticeably for Spring
- Summer participation still accounts for almost half of all recorded activity

Boating Activities



Coastal Participation



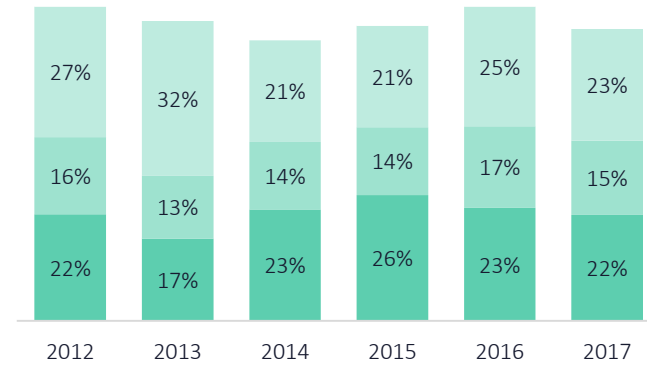
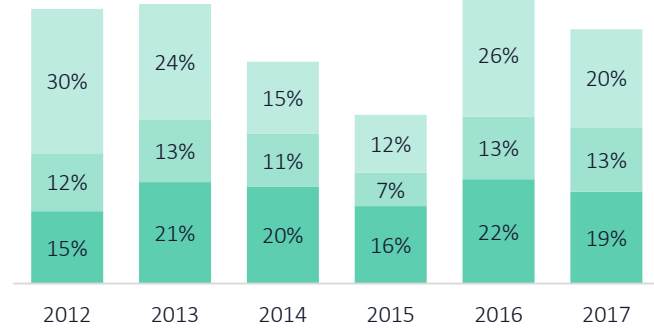
- Historically participation at the coast remained at 90%, but this has risen for the past 2 years, to 93% in 2016 and 95% in 2017
- Largely driven by coastal walking and spending leisure time at the beach, the trend for all activities is very much geared towards coastal activity
- For all boating activities the split continues to fluctuate around 50% inland and coastal

Proportion of Training

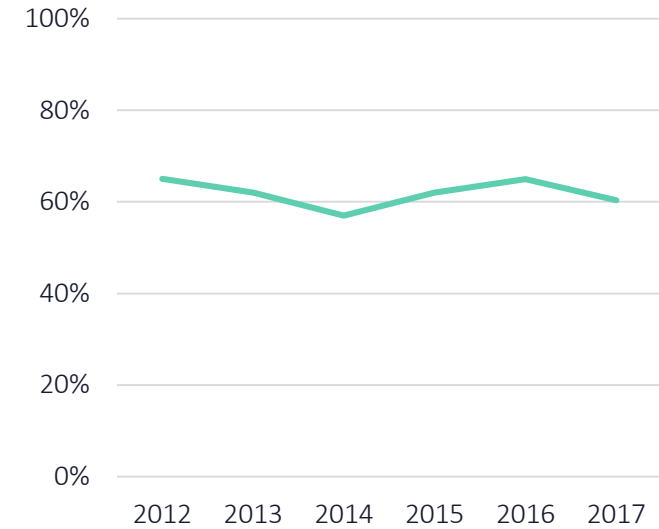
Any Activity

■ Yes, more than 2 days
■ Yes, 1-2 days
■ Yes, less than a day
■ None

Any Boating

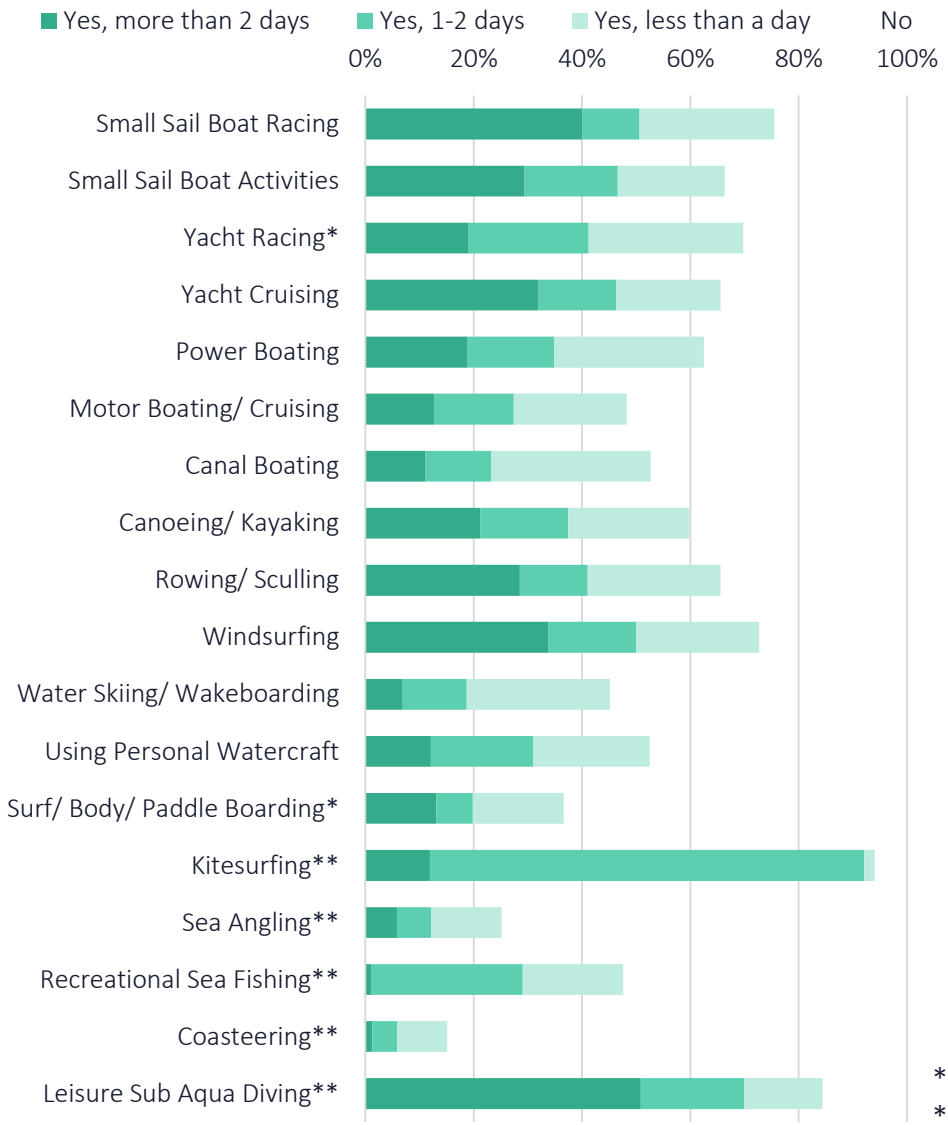


Proportion of boaters with training



- After an increase in training for ‘any activity’ last year, 2017 has seen a slight decrease, with 53% of people having some sort of training
- 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
- 2017 has seen a slight decrease in both the number of boaters with training and the percentage of people who have had more than 2 days training

Proportion of Participants with Training



- Training continues to differ among activities, with between 15% and 94% of people having had some form of training across different activities
- People participating in Coasteering and Sea Angling were the least likely to have received training
- Kitesurfing, Diving, Racing activities and Windsurfing had the highest percentage of trained participants. With over half of Divers having received more than 2 days of training and 80% of Kitesurfers receiving 1-2 days of training

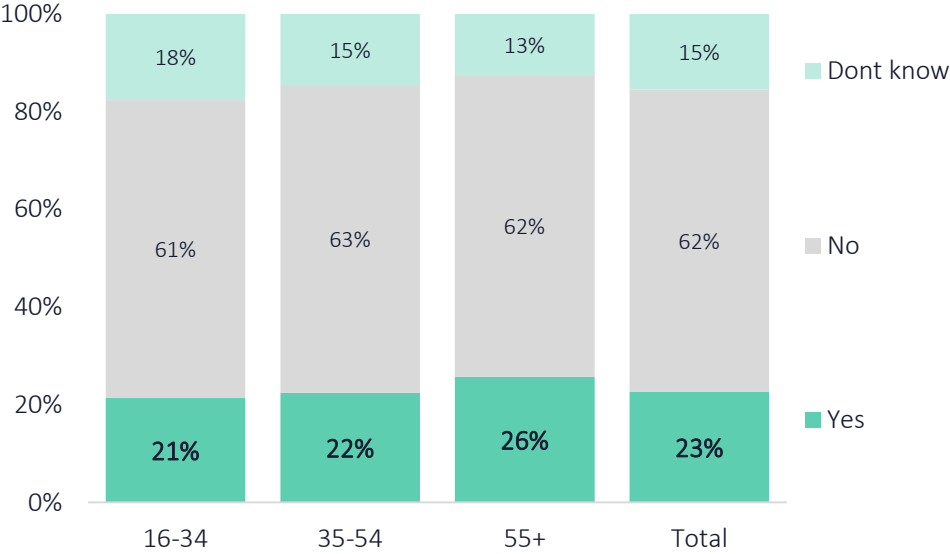
*sample less than 100
 **sample less than 50

SAFETY

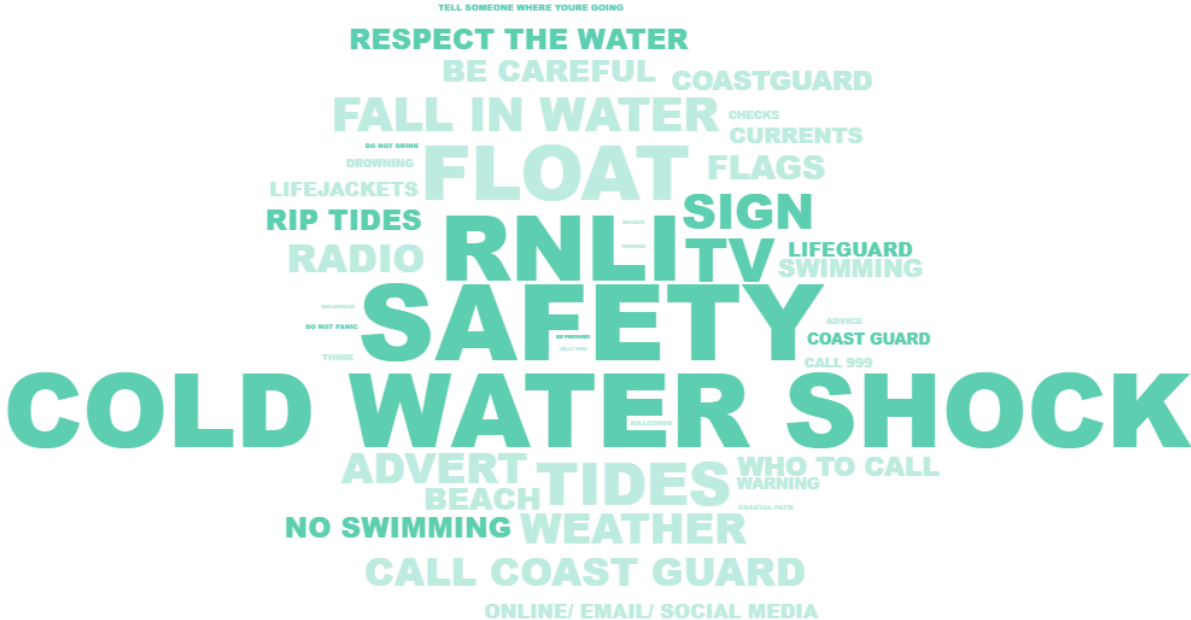


Awareness of Public Safety Messages

Have you ever seen any public safety messages or received any advice in the last 12 months in relation to safe use of the sea/ coastline in the UK?



Please briefly tell us what the messages or advice was and where you saw or received it?



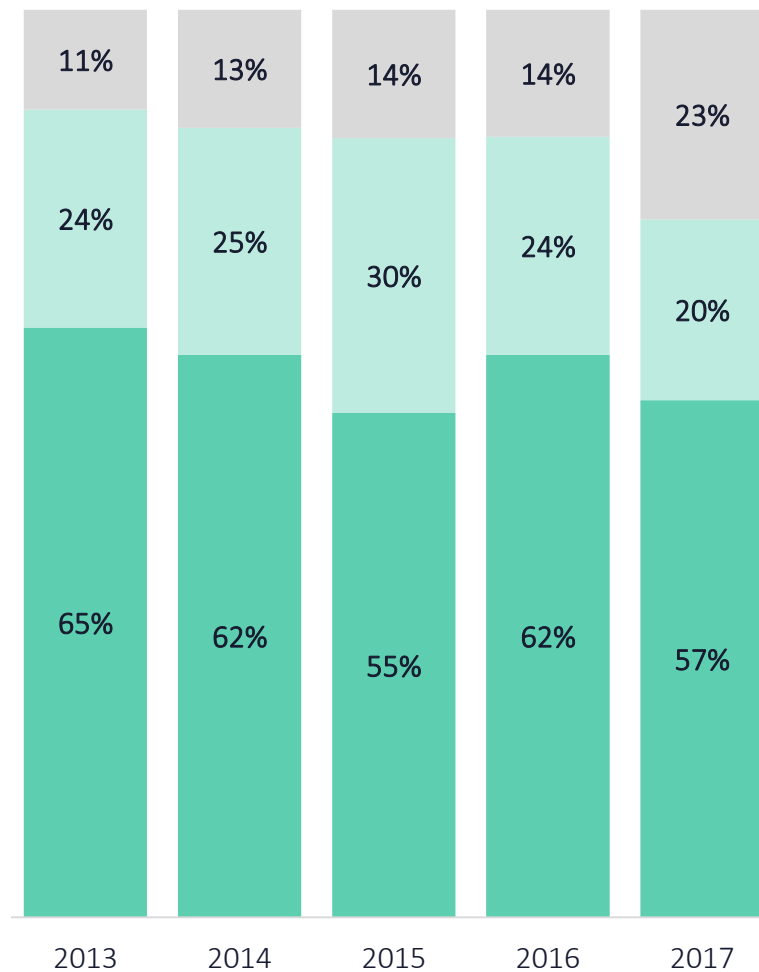
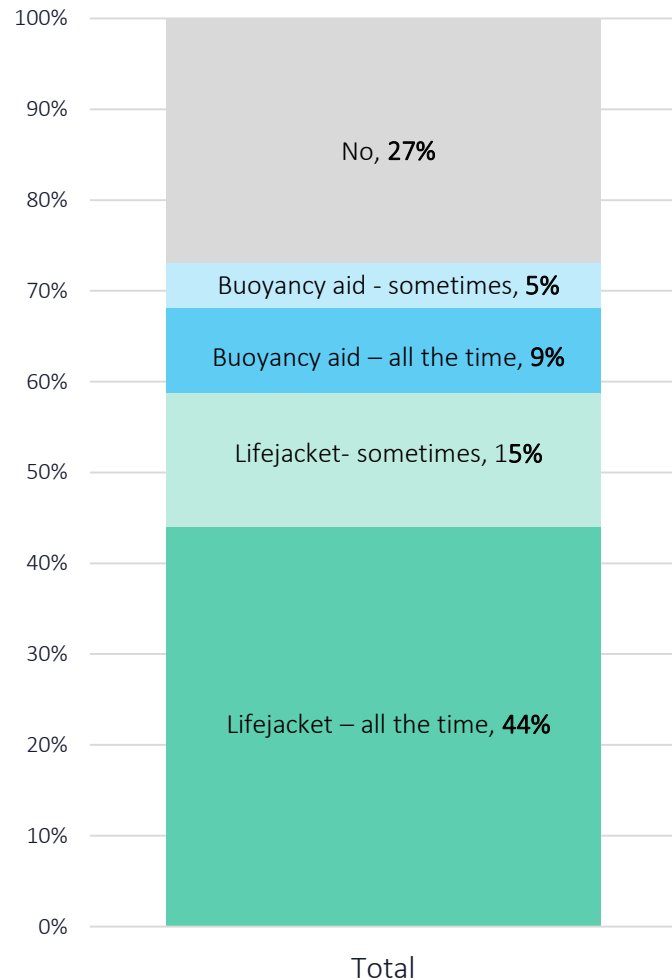
- When asked about public safety messages, 23% said they recalled seeing some sort of message, with a further 15% not sure
- The main specific safety message people remember was about cold water shock, with the majority also remembering advice to float. 3% of people recalled hearing a message about rip tides
- Half of the people who could remember which organisation provided the message said they heard it (or thought they had heard it) from the RNLI and 25% said the Coast Guard

Lifejackets/ Buoyancy Aids whilst Boating

Lifejacket/ buoyancy aid usage for any activity

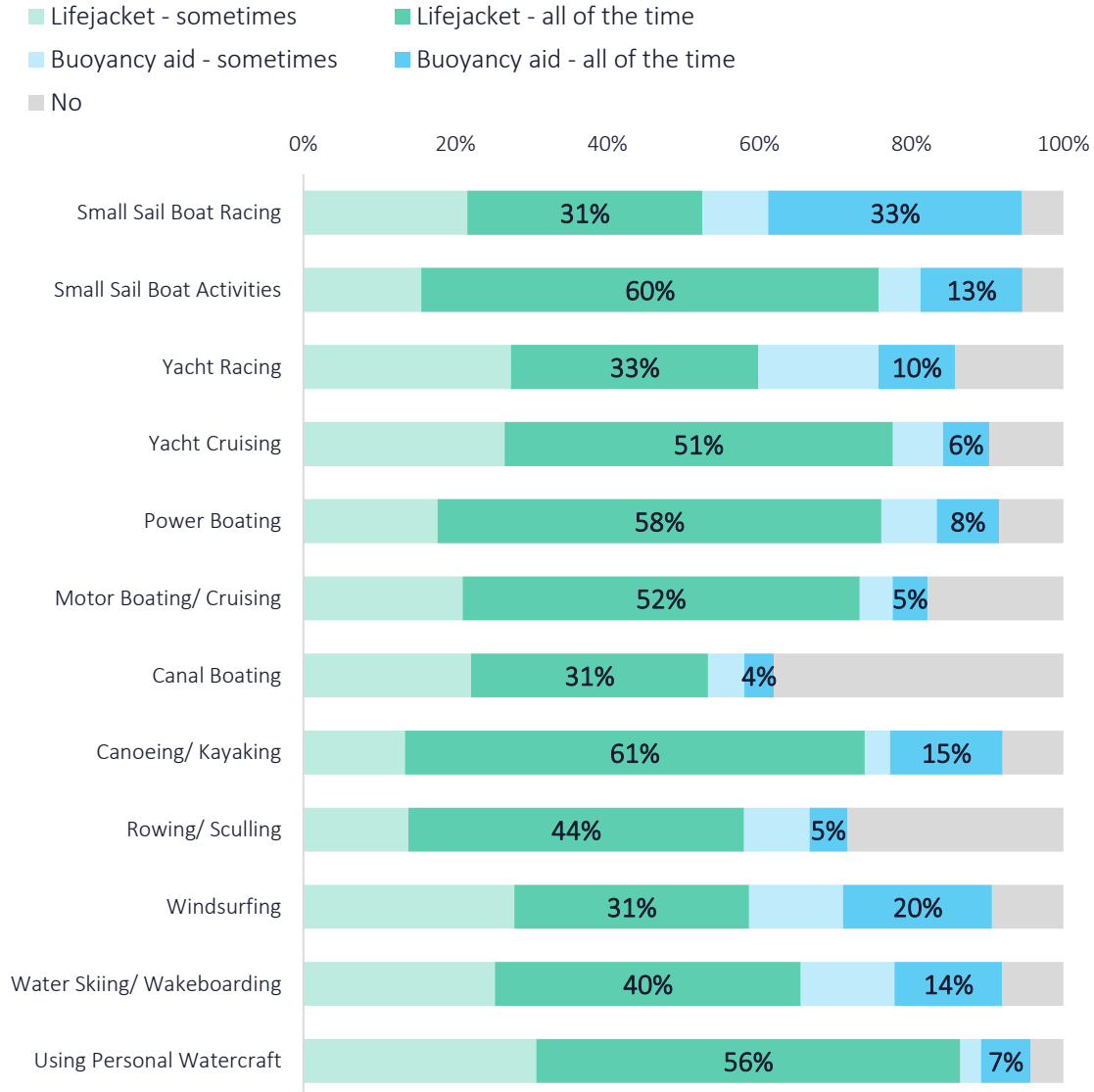
Lifejacket/ buoyancy aid usage for any boating activity
(excluding rowing)

■ Yes, all of the time ■ Yes, some of the time ■ No



- This year the wording of the lifejacket/ buoyancy aid question, splitting out lifejackets and buoyancy aids
 - For the purpose of the trend data, they have been regrouped to compare with previous years
- The question itself also changed, from asking whether respondents wear lifejackets/ buoyancy aids when participating, to if they wore one the last time they participated
- When taking part in 'any activity' 59% wear a lifejacket and 14% use a buoyancy aid (either some or all of the time)
- The general trend for lifejacket/ buoyancy aid usage whilst boating has been in slight decline since 2013
 - This year saw a more drastic decline, which could be partly due to the question wording

Lifejackets/ Buoyancy Aids whilst Participating



- As with previous years, we can see that lifejackets/ buoyancy aids are used most often for sailing and power boating activities
- People canal boating and rowing are the least likely to wear a lifejacket or buoyancy aid
- 87% of people using personal watercrafts will also wear lifejackets
- 27% of water-skiers/ wakeboarders and 32% of windsurfers will use buoyancy aids either some or all of the time
- For the majority of activities, if people are wearing lifejackets or buoyancy aids they are likely to wear them all of the time as opposed to part of the time

This years report has been funded by:



Royal Yachting Association



British Marine



Royal National Lifeboat Institution



British Canoeing



Maritime and
Coastguard Agency

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