



the nursery

Research and Planning

Watersports Participation Survey 2022

04 April 2023





Research methodology

- Online, device-agnostic survey
- Respondents recruited from the Dynata online panel
- Responses weighted to proportions of the UK population



Sampling

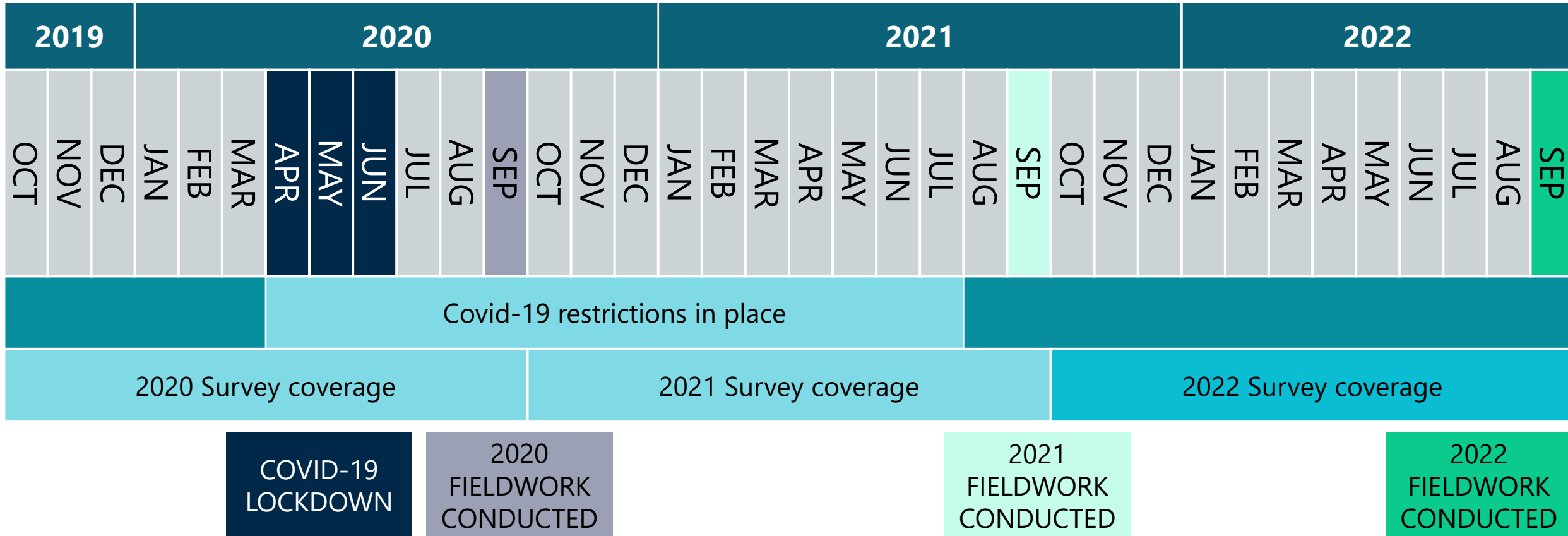
- 12,717 respondents for Market Sizing questionnaire
- 2,338 respondents for the Bespoke section



Timing

- 6th September – 28th September 2022

The 2022 survey covers a full 12 month period with no formal COVID-19 restrictions. Therefore, it is a good marker of how the Watersports market is recovering from the effects of the Pandemic. However, with financial concerns affecting many in the UK in light of high inflation and interest rates, the year is by no means 'back to normality'.

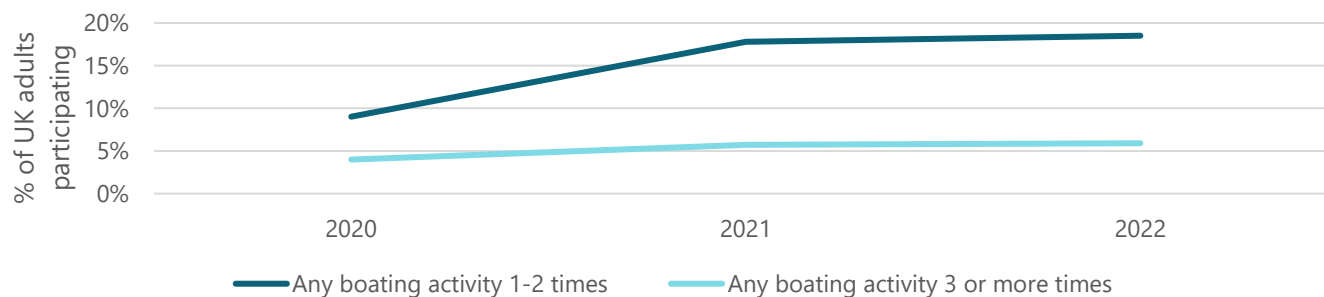


In 2022, participation levels remained fairly stable against 2021's figures.

| | | Online method | | | 95% sig '21 vs '22 |
|---------------------------------|------------------------|---------------|--------------|--------------|-----------------------|
| | | 2020 | 2021 | 2022 | |
| Any watersports activity | 1-2 times | 21.7% | 29.4% | 27.7% | |
| | 3 or more times | 40.3% | 37.4% | 44.6% | ▲ |
| Any boating activity | 1-2 times | 9.0% | 17.8% | 18.5% | |
| | 3 or more times | 4.0% | 5.7% | 5.9% | |
| Sailing activities | 1-2 times | 3.1% | 9.6% | 8.2% | ▼ |
| | 3 or more times | 1.2% | 2.4% | 1.8% | ▼ |
| Powered activities | 1-2 times | 6.8% | 14.5% | 14.9% | |
| | 3 or more times | 1.8% | 3.1% | 2.8% | |
| Manual activities | 1-2 times | 5.8% | 12.0% | 12.4% | |
| | 3 or more times | 4.0% | 5.3% | 6.2% | ▲ |
| Paddlesport activities | 1-2 times | 5.2% | 10.8% | 10.8% | ▲ |
| | 3 or more times | 2.8% | 3.9% | 4.5% | ▲ |
| Coastal activities | 1-2 times | 21.2% | 28.4% | 26.3% | ▼ |
| | 3 or more times | 38.5% | 34.9% | 42.5% | ▲ |

Following on from the pandemic, the huge growth in casual participation rates (defined as 1-2 times) has not died down. As seen in 2021, regular participation (defined as 3 or more times) has remained steady, with some activities experiencing moderate growth.

Notable is the growth in regular participation for coastal activities (up 7.6pp on 2021) and the continued growth of regular participants in paddlesports and manual activities.



COVID has presented unprecedented challenges across the market. With three years of data from the online methodology, spanning from the depths of the pandemic to a return to normality, we are able to see clearer trends across the years.



MARKET FACTORS



An exceedingly hot and dry summer in 2022 is likely to help improve the participation rate this year

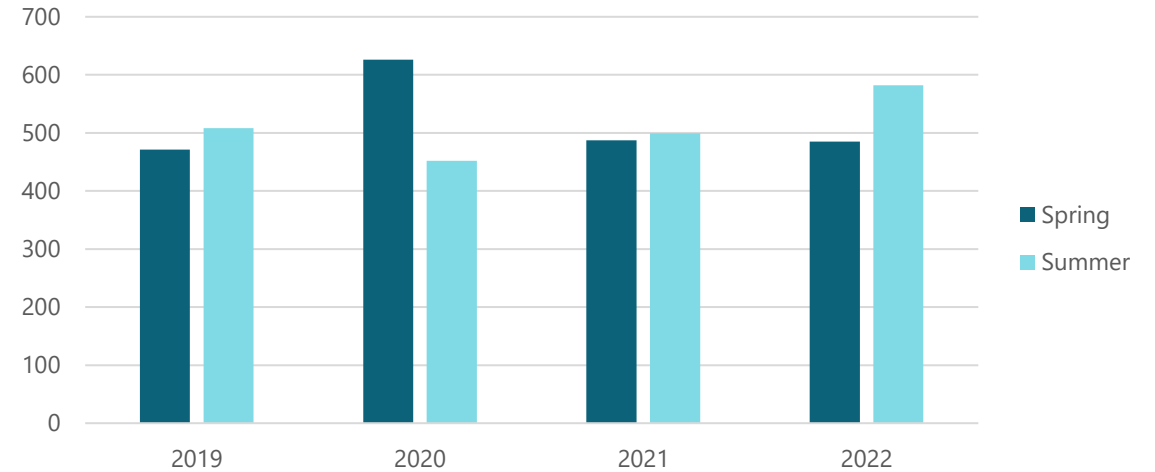
Over the years, we have seen that pleasant weather tends to bring people outside to participate in outdoor activities.

2022 saw one of the hottest and driest summers on record. Similar to 2021, Summer 2022 was drier and more sunny than the Spring, reversing the trend of 2020.

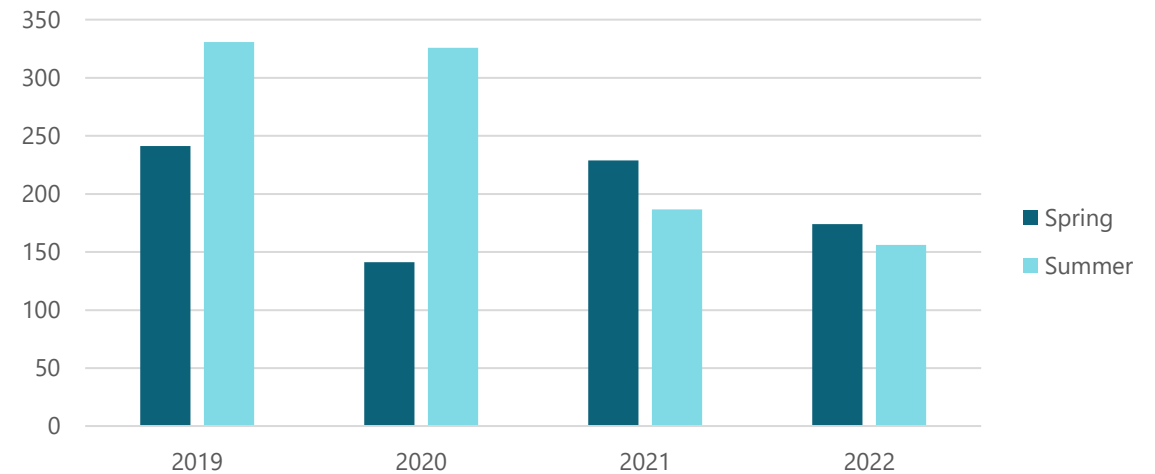
This is likely to have encouraged more people to participate in outdoor activities in 2022 to take advantage of the good weather.

Having said this, the extreme heat of the summer may have made some people less likely to participate.

Average sunshine hours

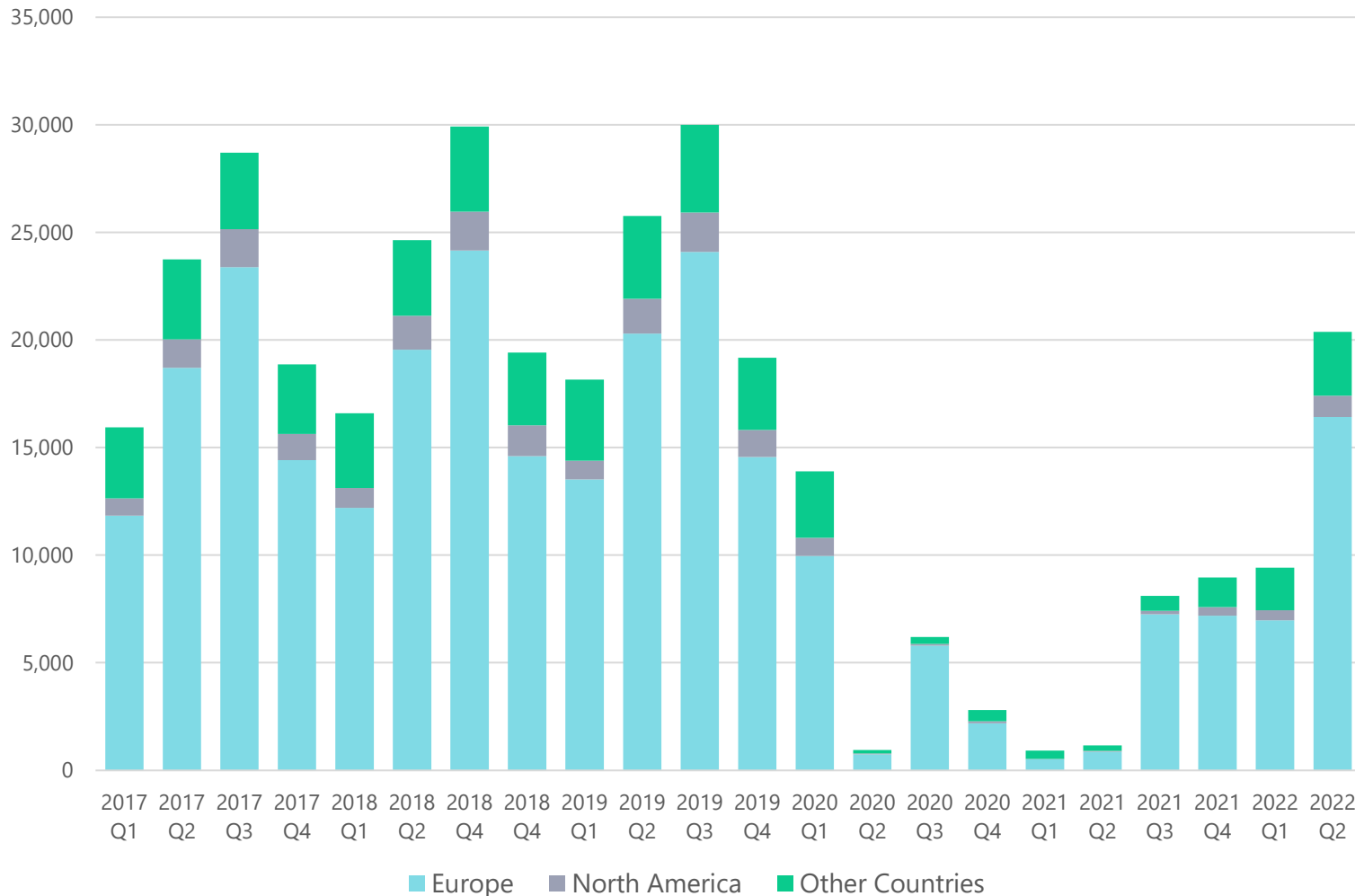


Average rainfall (mm)



International travel is recovering, but is still down on 2019 levels.

International Trips Made By UK Residents ('000s)



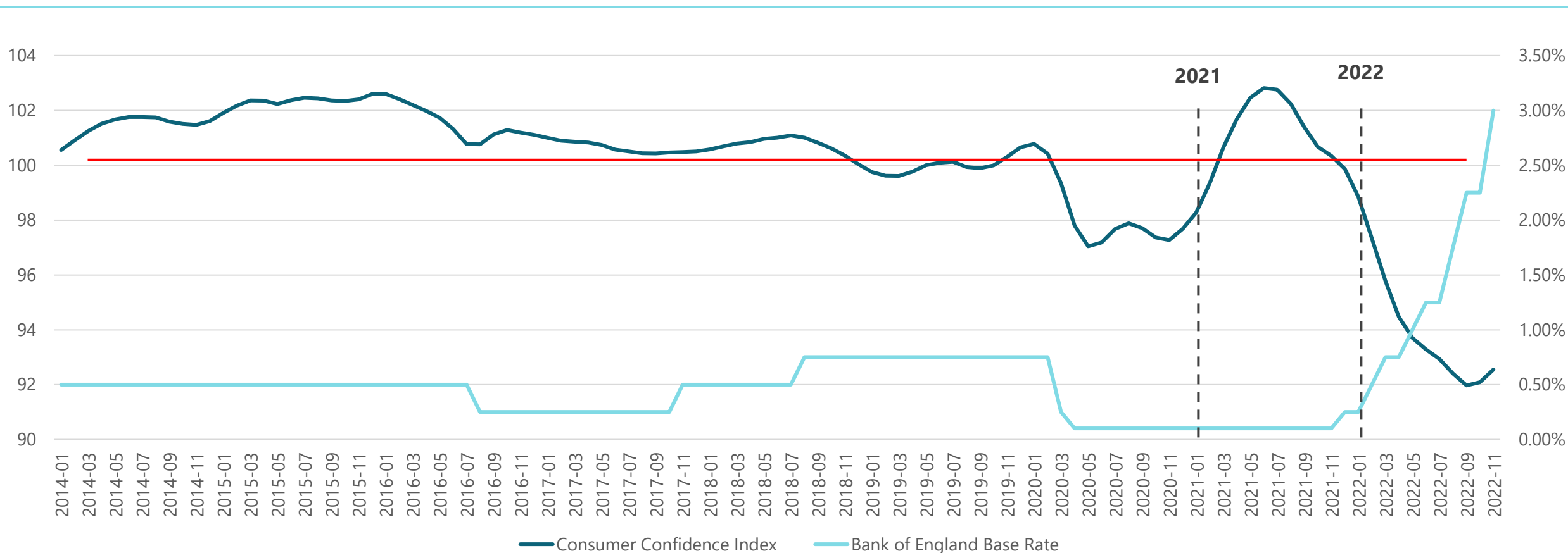
Beach holidays provide an opportunity for UK residents to participate in Watersports activities, either in this country or overseas.

ONS data to Q2 2022 shows that volumes of trips to overseas countries have increased considerably from last year but still remain lower compared to Q2 2019.

VisitBritain figures show that 118.9m domestic trips were taken in the final three quarters of 2021, which is only set to rise in 2022 as the country recovers from COVID.

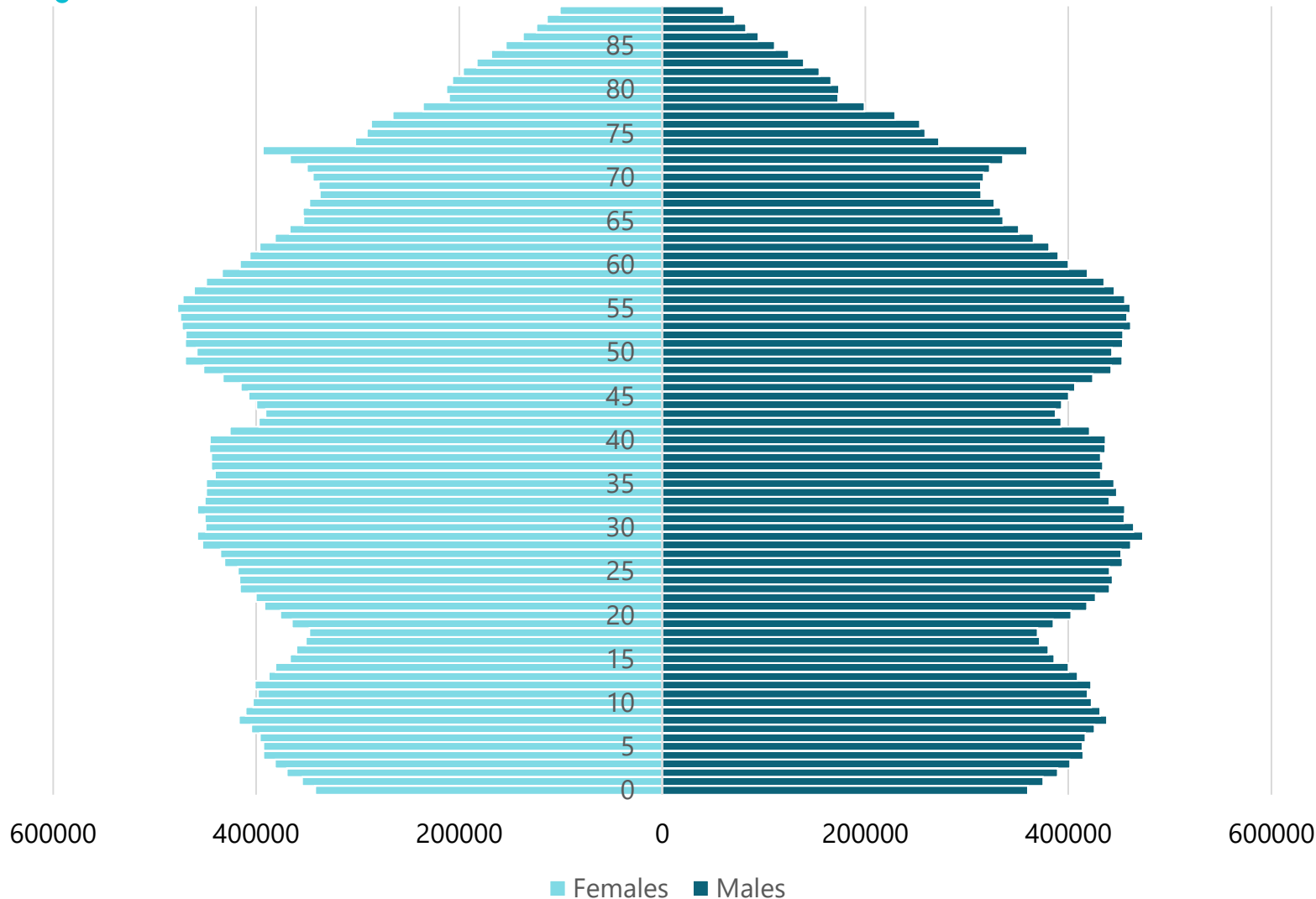
Inflation, cost-of-living concerns and interest rate rises are a real concern for British consumers in 2022. This could impact the watersports market going forwards, as people have less discretionary income and lower confidence in the economy.

Bank of England Base Rate x Consumer Confidence Index



Consumer Confidence Index Data taken from the Organisation for Economic Cooperation and Development (UK data) <https://data.oecd.org/leadind/consumer-confidence-index-cci.htm>

Base Rate Data taken from Bank of England <https://www.bankofengland.co.uk/monetary-policy/the-interest-rate-bank-rate>



We know that the population is getting older as people live longer.

The chart shows the peaks and troughs of the population profile by age.

There is a large trough between the ages of 10 and 20 meaning there are fewer younger people who can get involved with watersports compared to 10 years ago.

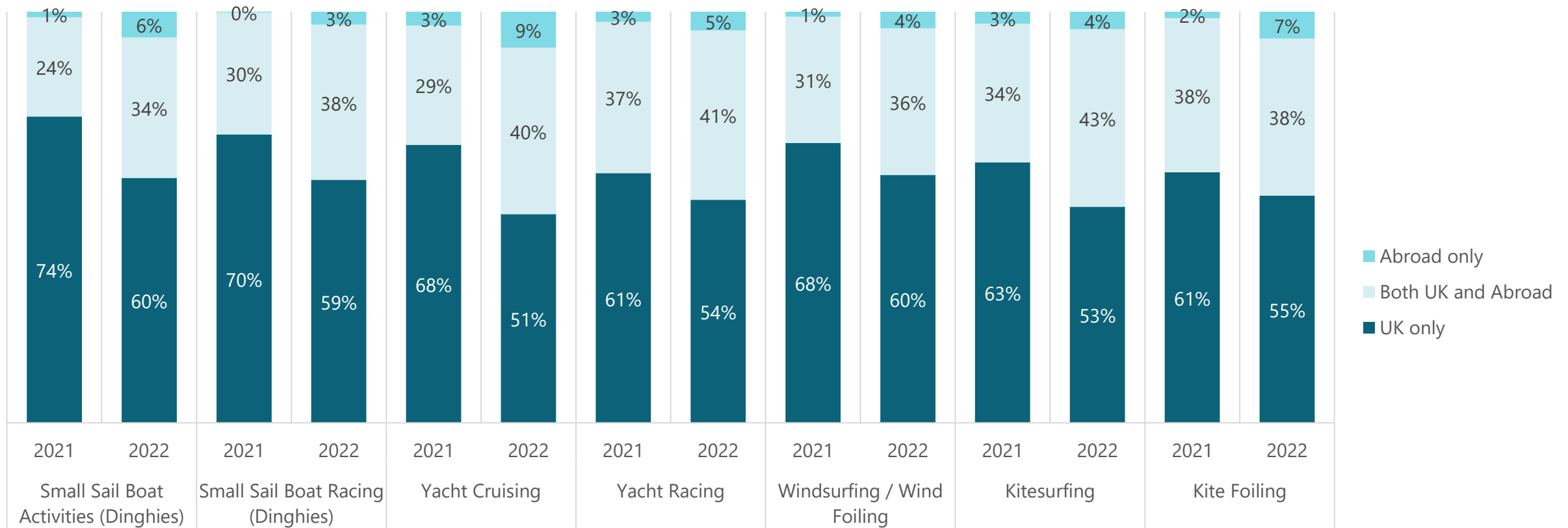


PARTICIPATION IN UK OR ABROAD



As expected, participation abroad is recovering well from the pandemic. Many more people are participating abroad.

Proportion of sailing participants who participated in the UK or abroad



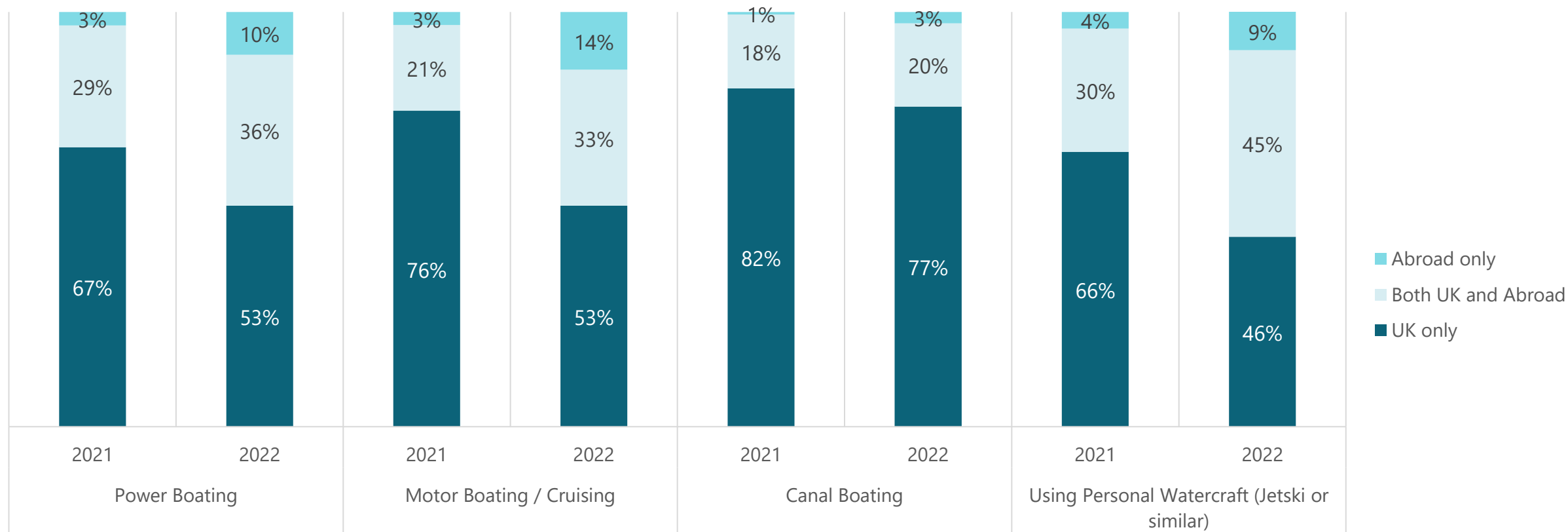
Question: How many times have you done each of the following **in the UK** in the last 12 months? How many times have you done each of the following **abroad** in the last 12 months?

Base: All who have done activity in past year, sizes vary

Weighting: Demographic

Most users of Personal Watercraft are outside the UK this year. Canal boating participation tends to remain domestic.

Proportion of powered participants who participated in the UK or abroad



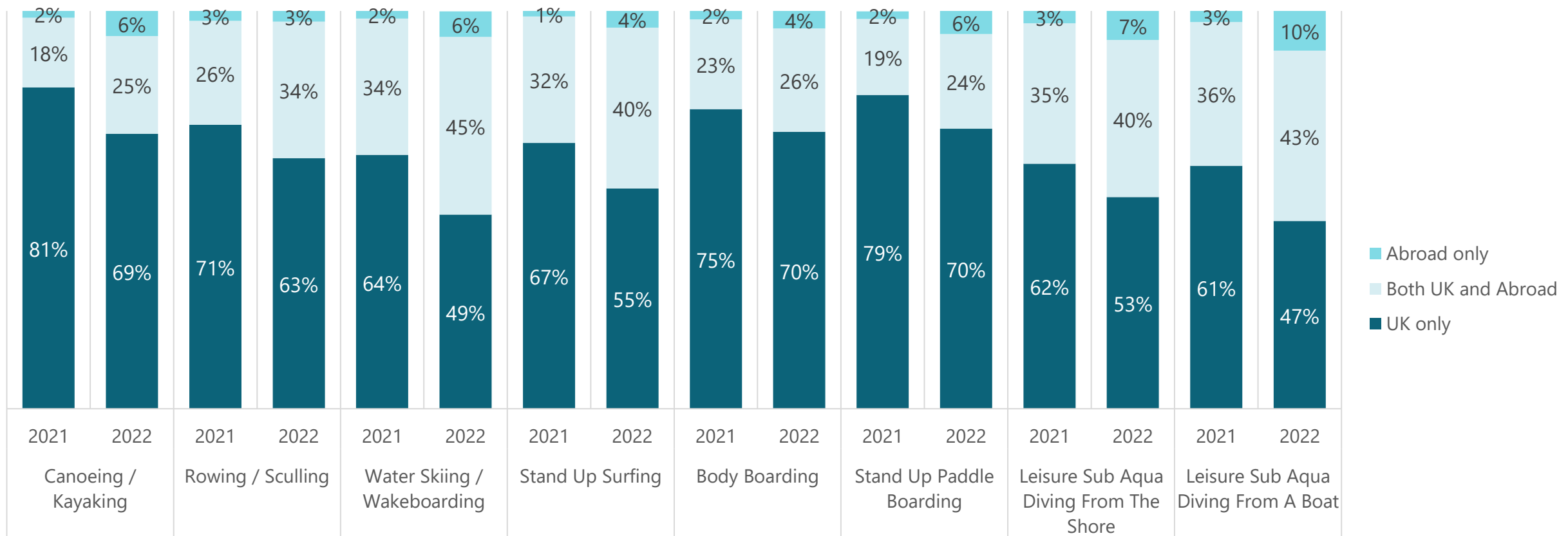
Question: How many times have you done each of the following **in the UK** in the last 12 months? How many times have you done each of the following **abroad** in the last 12 months?

Base: All who have done activity in past year, sizes vary

Weighting: Demographic

Water skiing/ wakeboarding and leisure sub aqua diving from a boat are the activities most likely to be undertaken overseas

Proportion of manual participants who participated in the UK or abroad



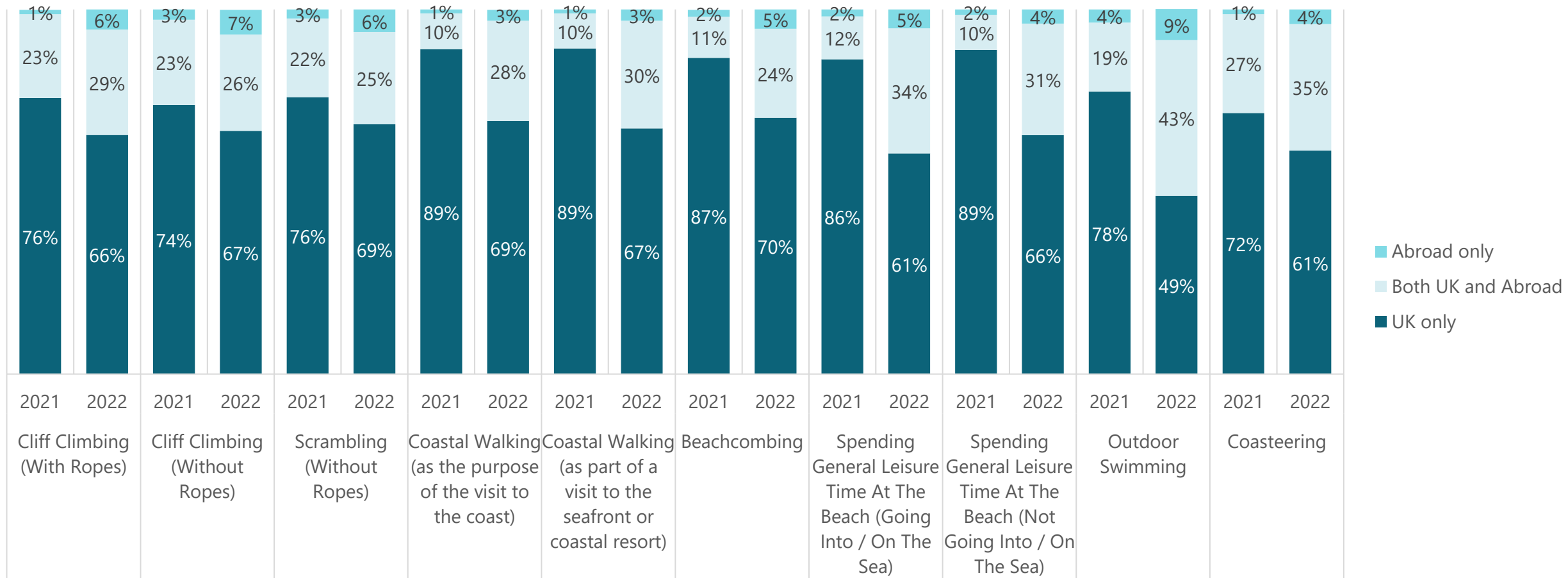
Question: How many times have you done each of the following **in the UK** in the last 12 months? How many times have you done each of the following **abroad** in the last 12 months?

Base: All who have done activity in past year, sizes vary

Weighting: Demographic

All coastal activities are more likely to have been done in the UK only, with the exception of Outdoor Swimming, which 52% of people have done outside the UK

Proportion of coastal participants who participated in the UK or abroad



Question: How many times have you done each of the following **in the UK** in the last 12 months? How many times have you done each of the following **abroad** in the last 12 months?

Base: All who have done activity in past year, sizes vary

Weighting: Demographic



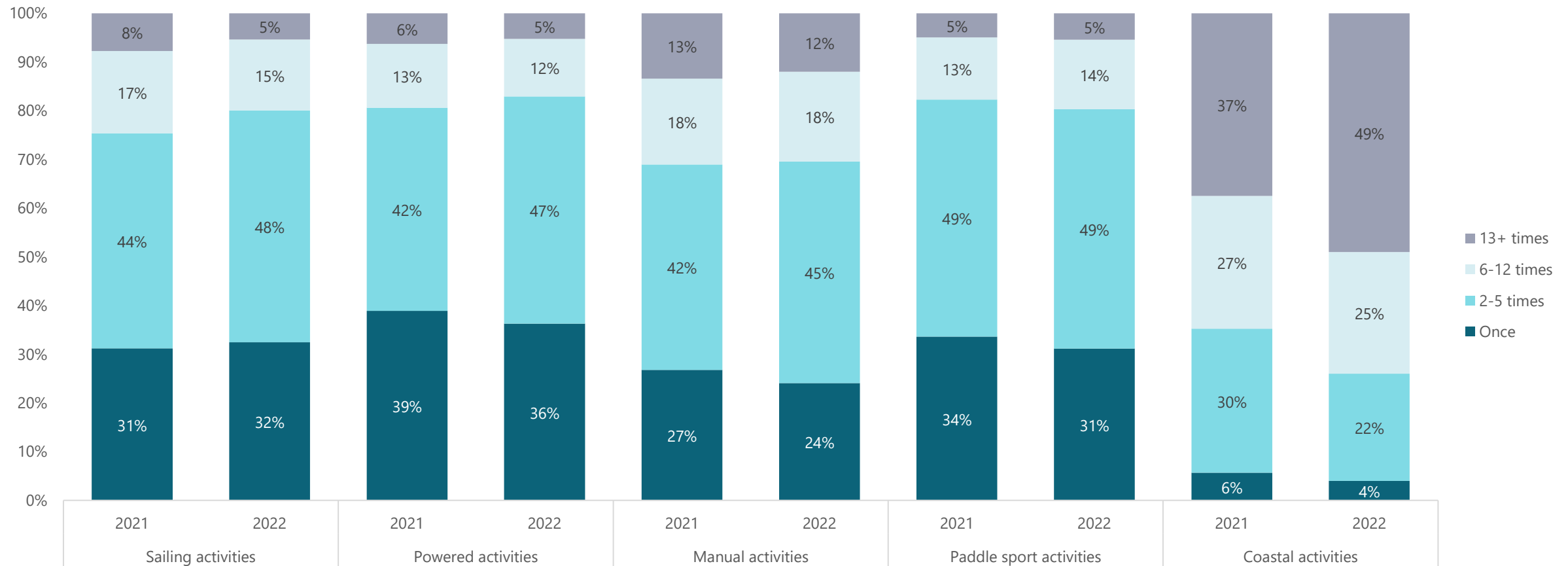
FREQUENCY OF PARTICIPATION



Coastal activities, which generally require little or no specialist training or equipment, are done the most frequently and show an increase in participation 13+ times.

Participation rates across the frequency categories remain largely consistent for the other categories.

Frequency of participation



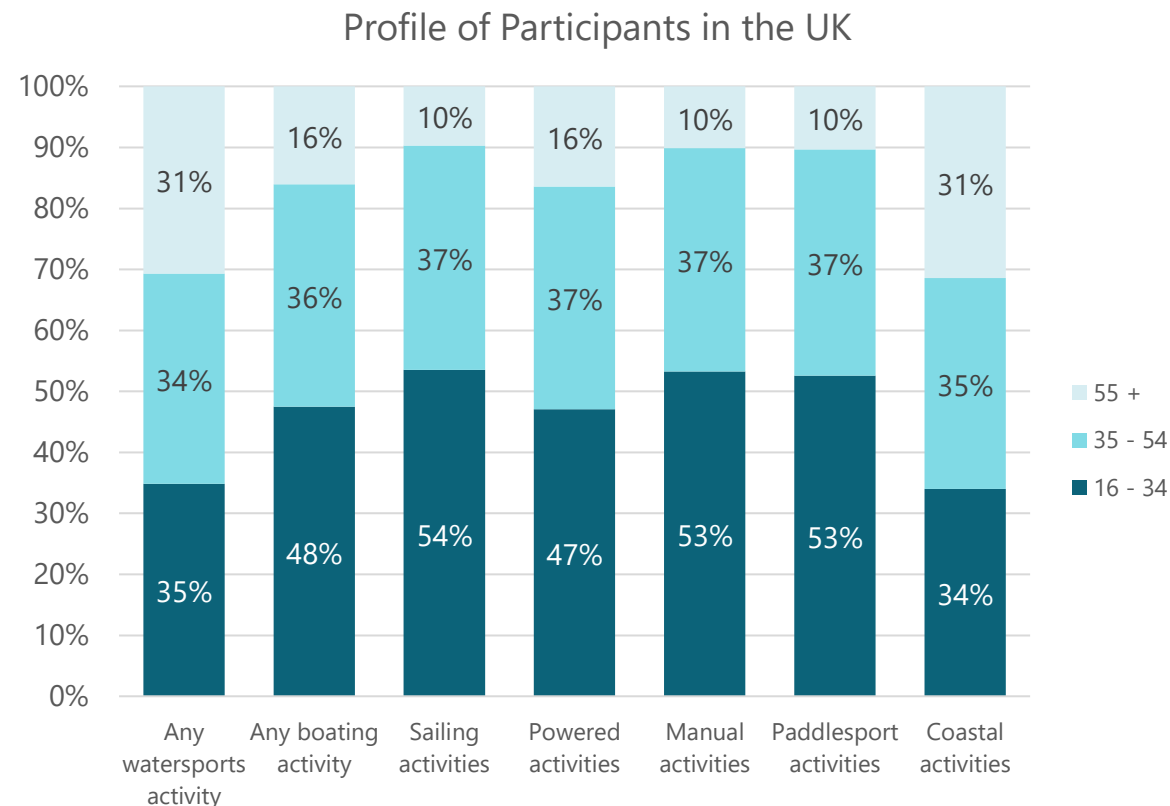
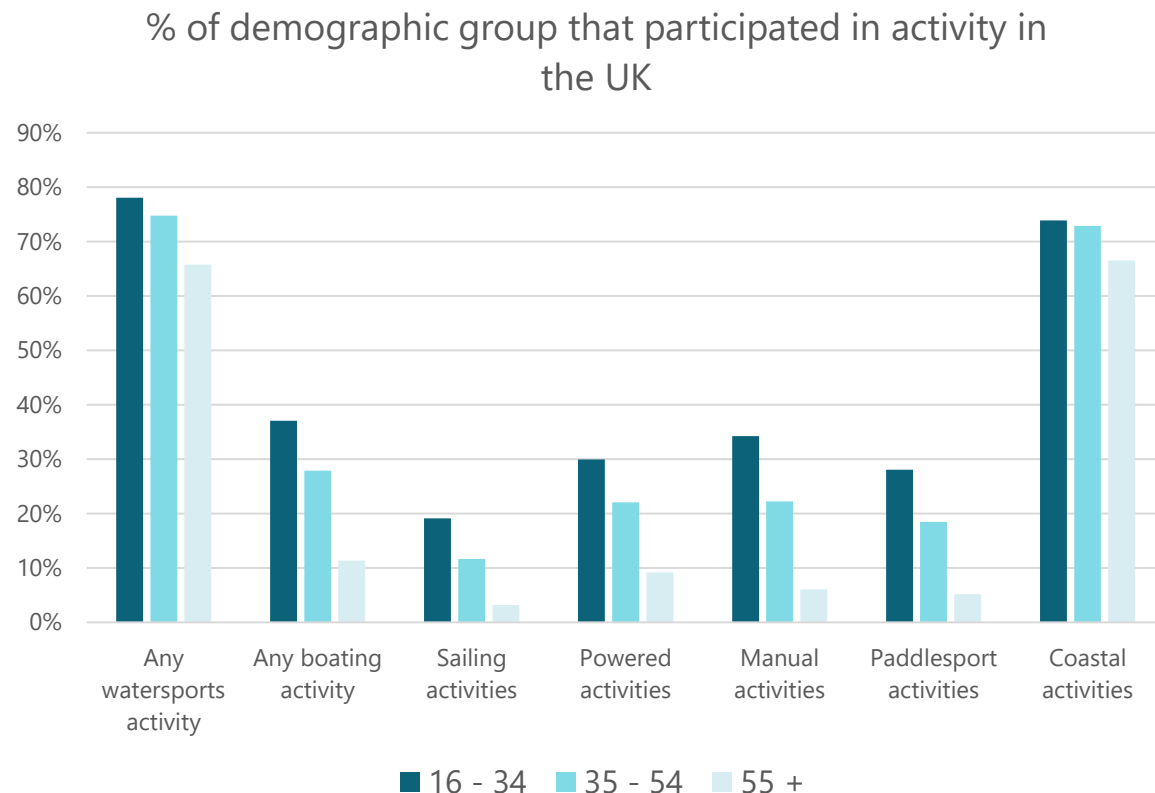
Question: How many times have you done each of the following **in the UK** in the last 12 months? How many times have you done each of the following **abroad** in the last 12 months?

Base: All who have done activity in past year, sizes vary

Weighting: Demographic

The youngest age group has the highest propensity to take part in all categories. They make up the largest proportion of participants in all categories except for coastal activities where there is a more even breakdown across all three age groups.

Proportion of each age group participating and age profile of participants



Question: Which of these activities you have taken part in within the **past year [2022]**?

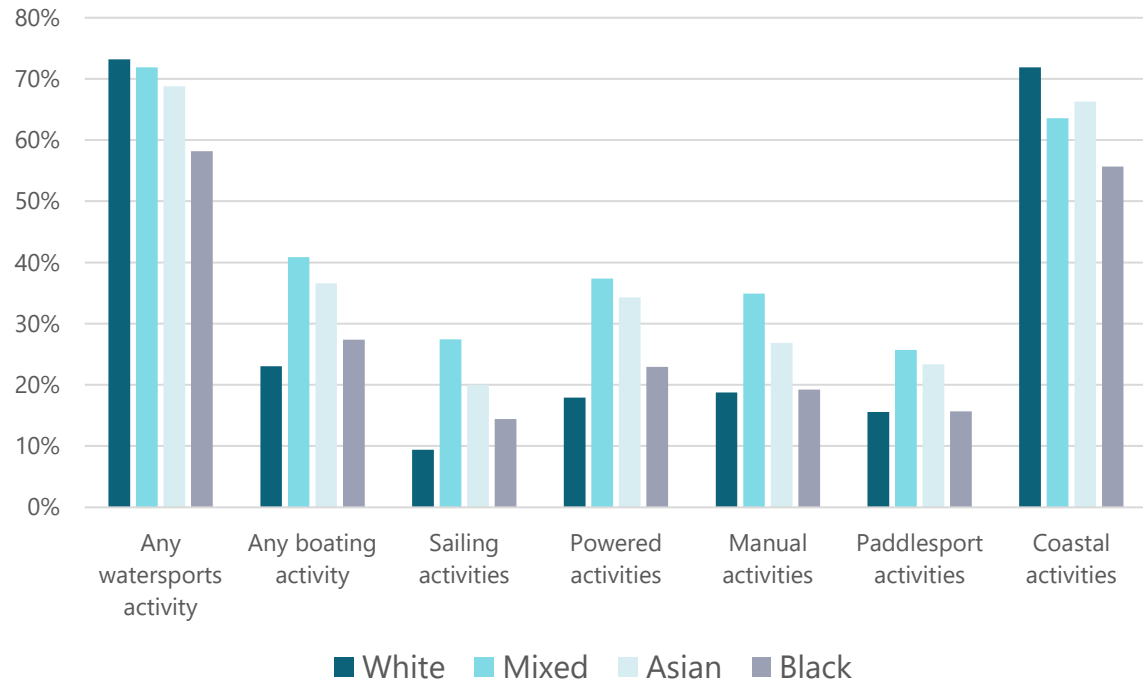
Base: all respondents (12,717)

Weighting: Demographic

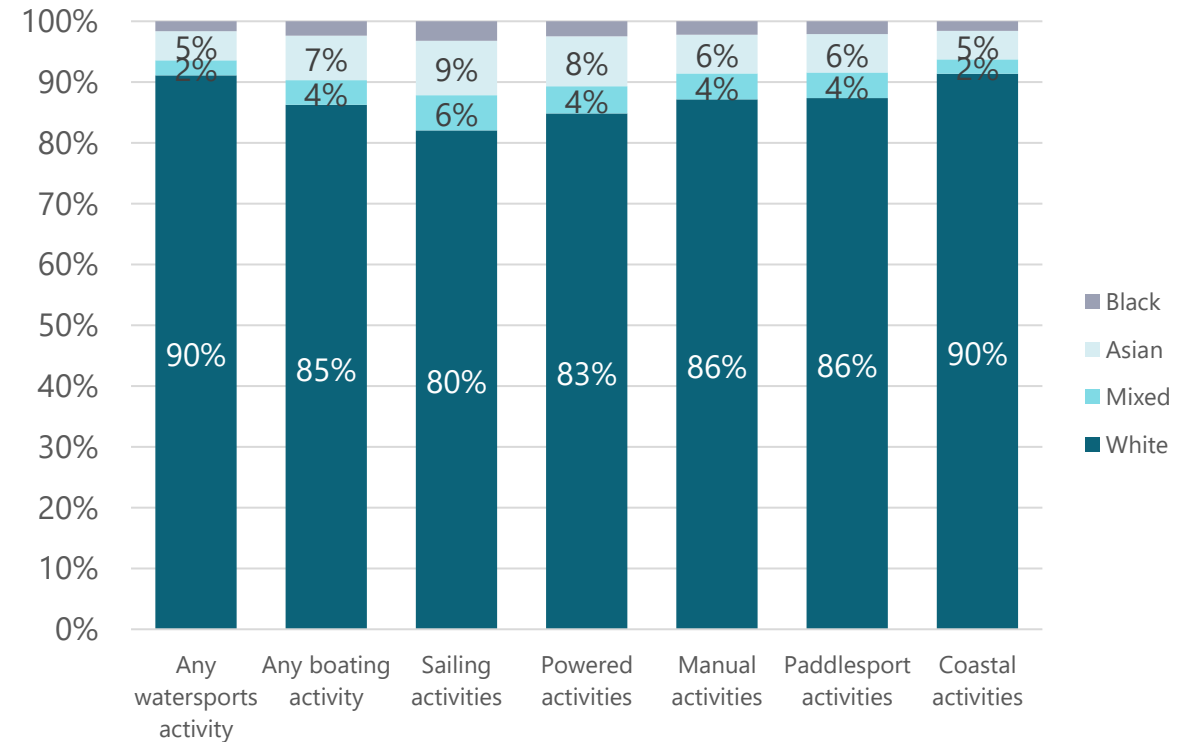
Although the majority of respondents were in the white ethnic group, respondents who are Mixed/Asian/Black were proportionally more likely to have taken part in most activity groups

Proportion of each ethnic group participating and ethnic profile of participants

% of demographic group that participated in activity in the UK



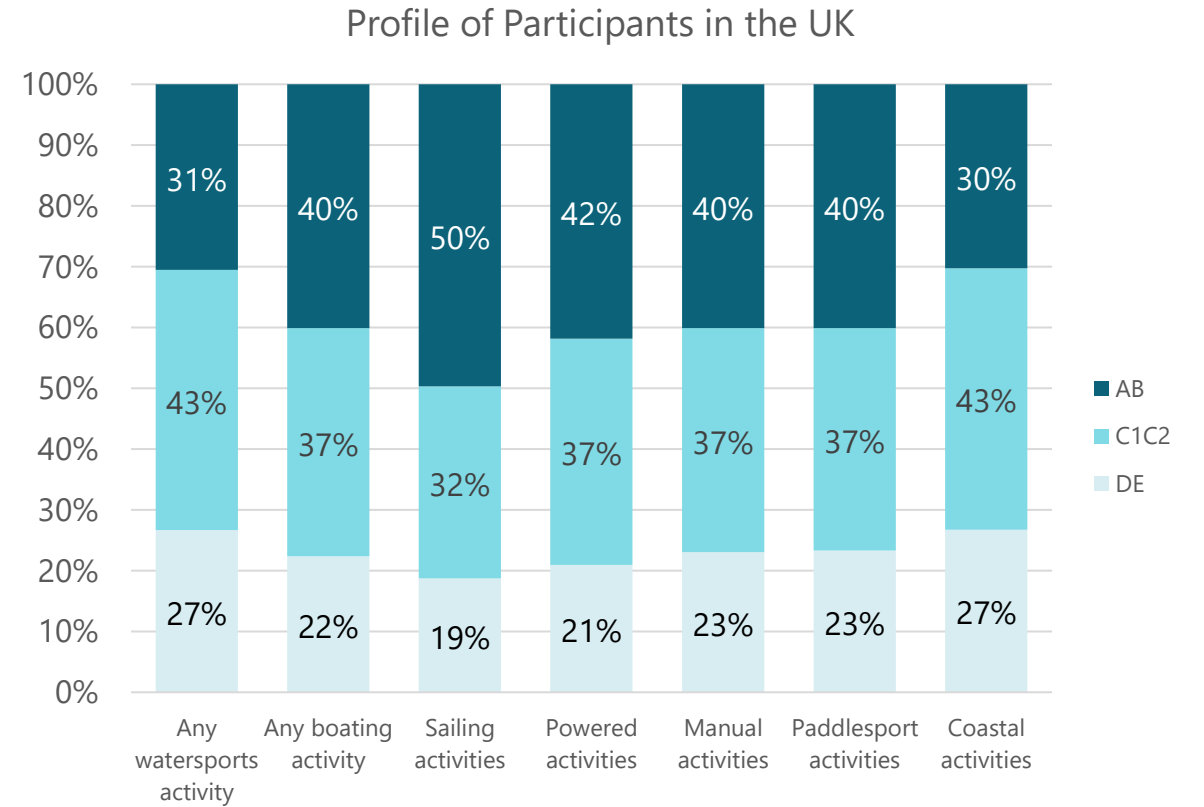
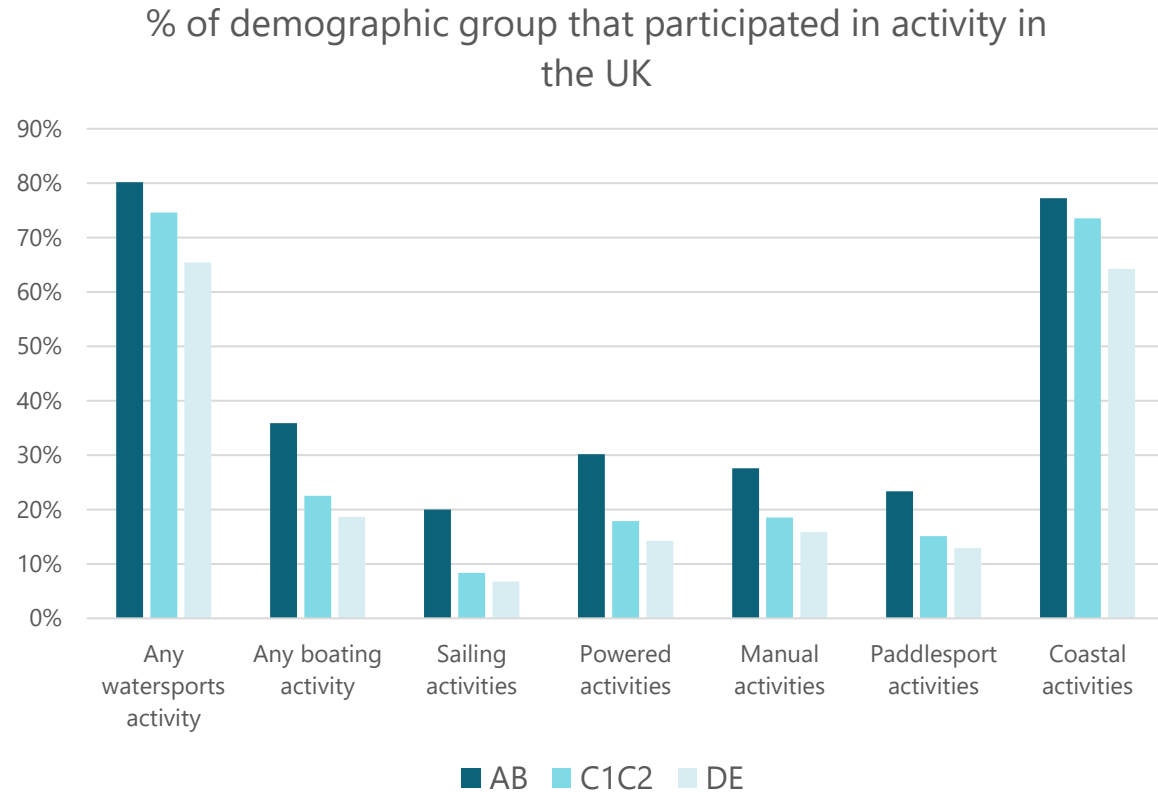
Profile of Participants in the UK



Question: Which of these activities you have taken part in within the **past year [2022]?**
 Base: all respondents (12,717)
 Weighting: Demographic

Those in the AB socio-economic group are more likely to have participated across all activity groups. They make up the largest proportion of participants in the sailing category.

Proportion of each socio-economic group participating and socio-economic group profile of participants

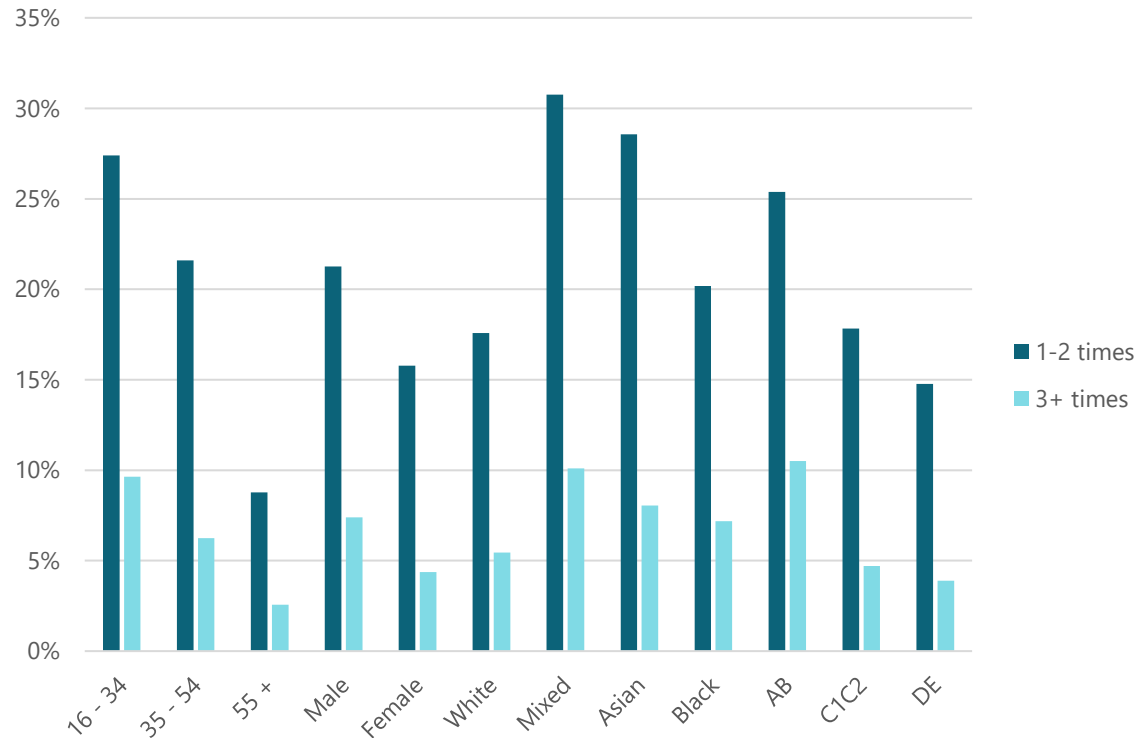


Question: Which of these activities you have taken part in within the **past year [2022]?**
 Base: all respondents (12,717)
 Weighting: Demographic

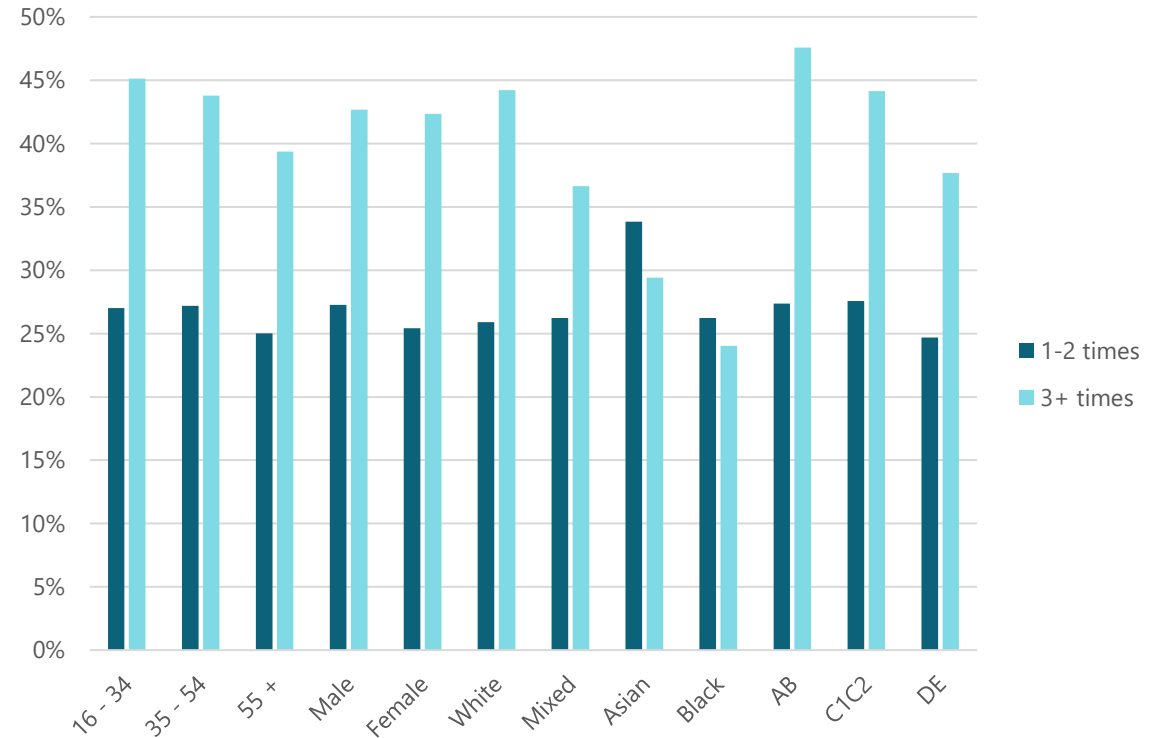
Within boating activities, younger people, males, and higher social grades tend to participate more frequently. Coastal activities do not see the same gender split, however higher social groups are more likely to be regular participants.

Profile of participants by frequency of participation

Any boating

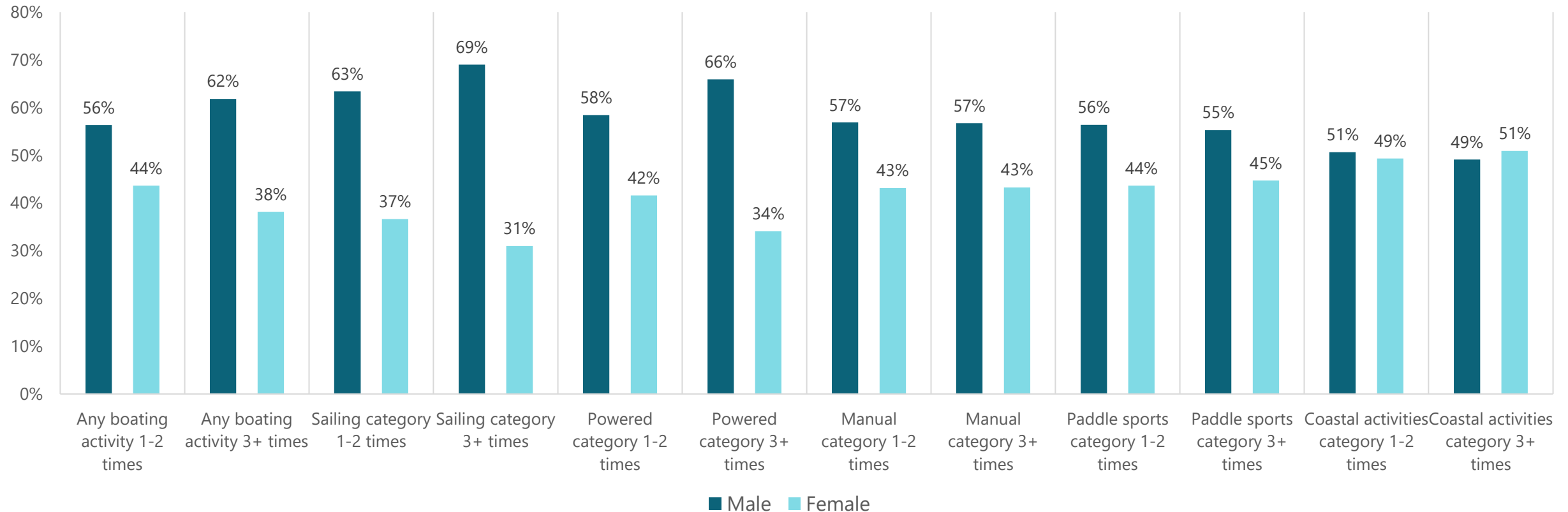


Coastal activities



Question: Which of these activities you have taken part in within the **past year [2022]?**
 Base: all respondents (12,717)
 Weighting: Demographic (UK participants only, excludes those who took part abroad)

Participation in almost all Watersport types is skewed towards males; although coastal activities see even participation among males and females. Angling has the greatest gap between genders, particularly for Enthusiasts.



Question: Which of these activities you have taken part in within the **past year [2022]**?

Base: all respondents (12,717)

Weighting: Demographic (UK participants only, excludes those who took part abroad)

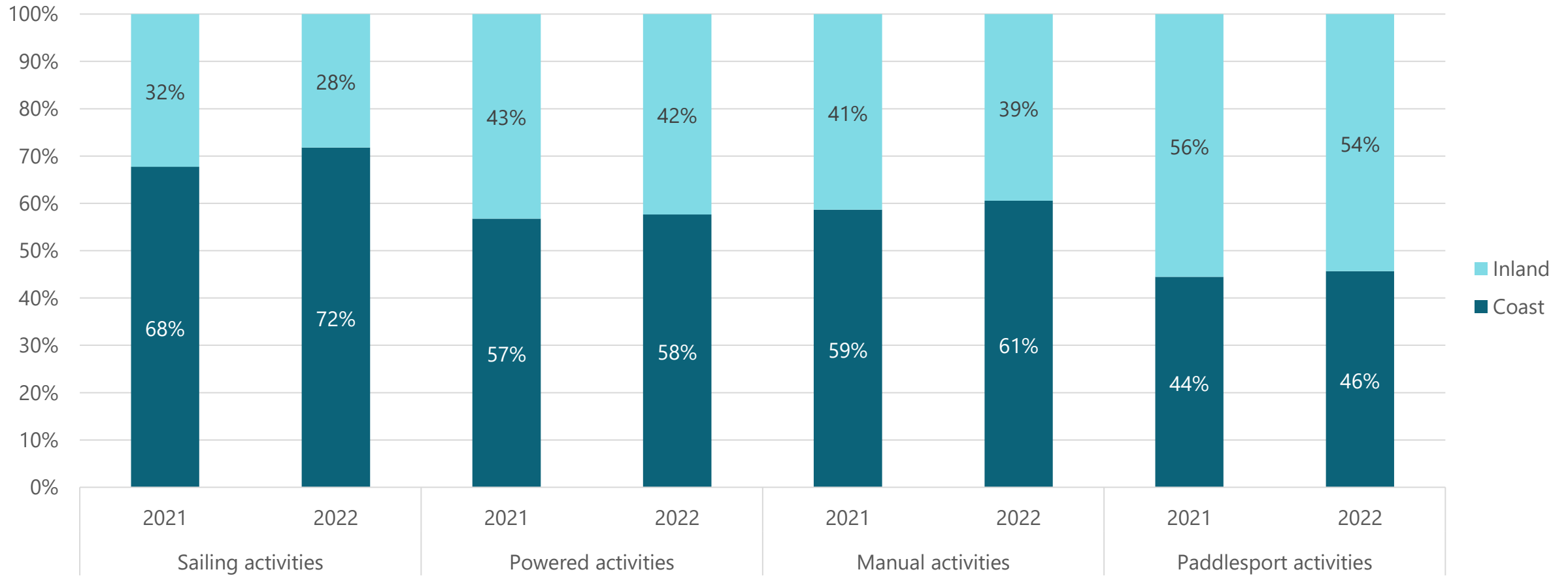


LOCATION OF ACTIVITIES



A greater proportion of sailing activities are performed at the coast than was the case in 2021. Other sports are fairly consistent; most participation is at the coast, except for Paddlesports, which are more often done inland.

Inland or coastal activities



Question: Please tell us how many times you did each activity at the coast / seaside and how many times inland. (UK Participation only)

Base: All who have done activity in past year, sizes vary

Weighting: Demographic

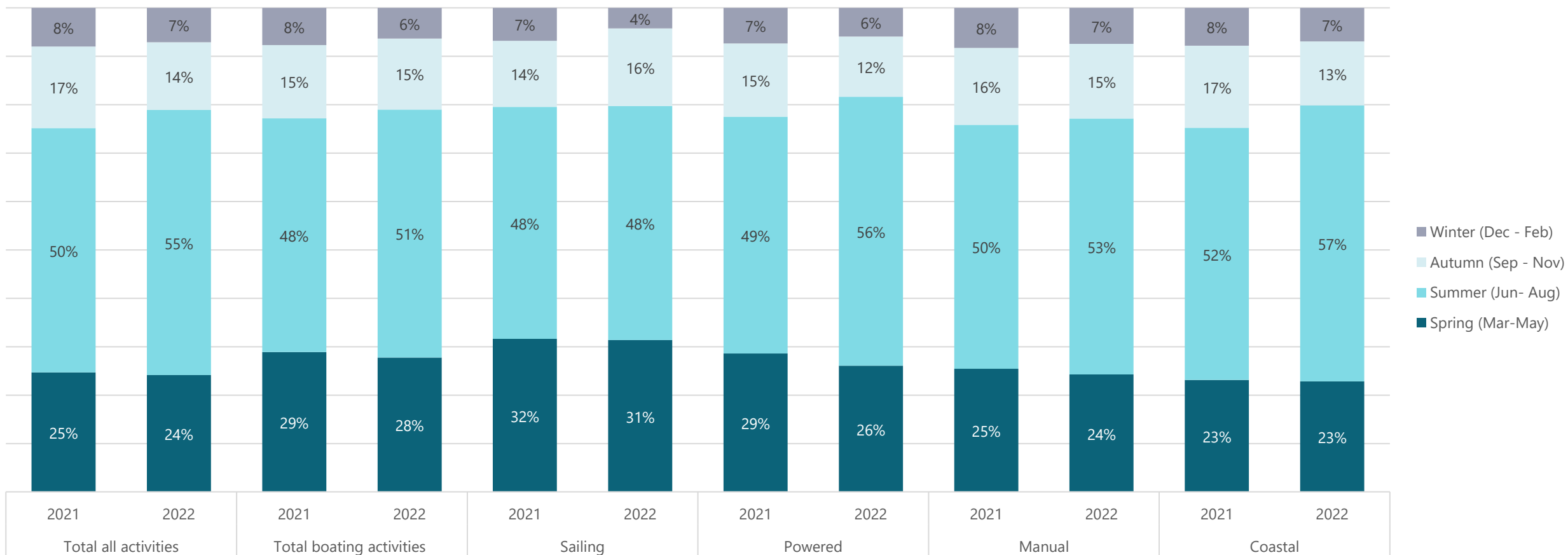


SEASONALITY



Summer participation was slightly more popular in 2022 compared to 2021, which may have been influenced by the good weather.

Seasonality



Question: We will now show you all of the activities you have done in the **past 12 months in the UK** and how many times you said that you did them in the past 12 months. Please tell us how many times you did each activity in spring, summer, autumn and winter **within the UK**.

Base: all respondents for bespoke section (2,338)

Weighting: Demographic



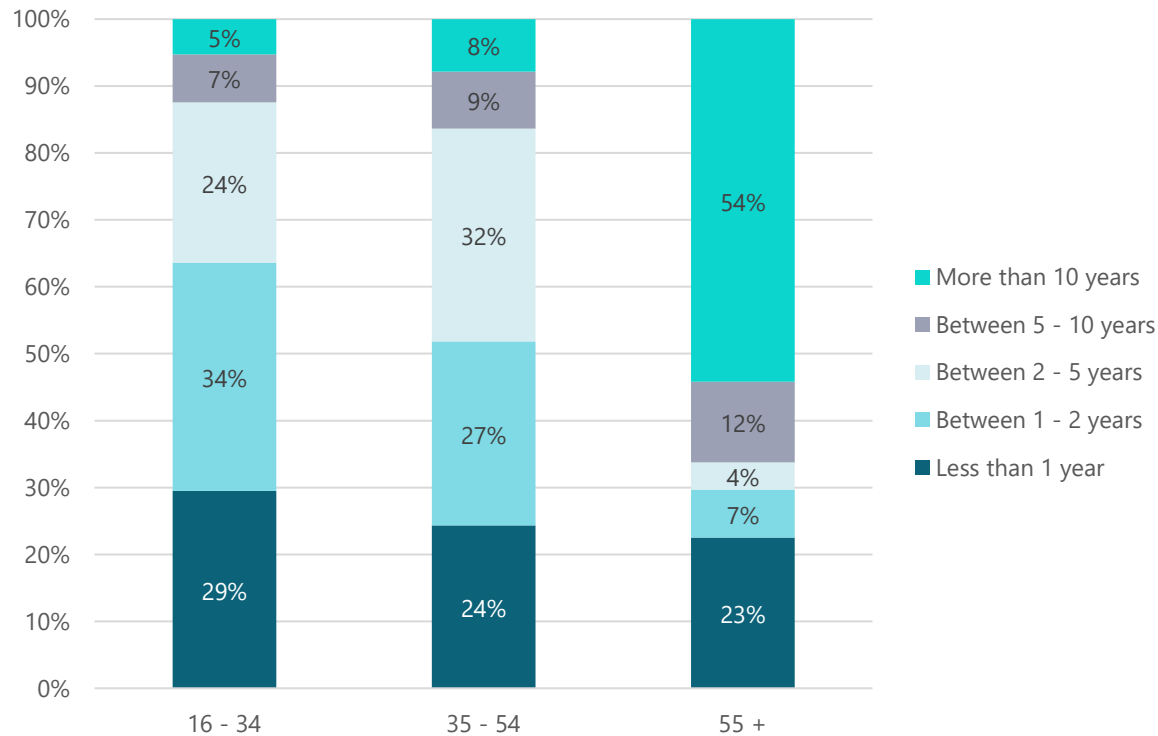
WHEN STARTED



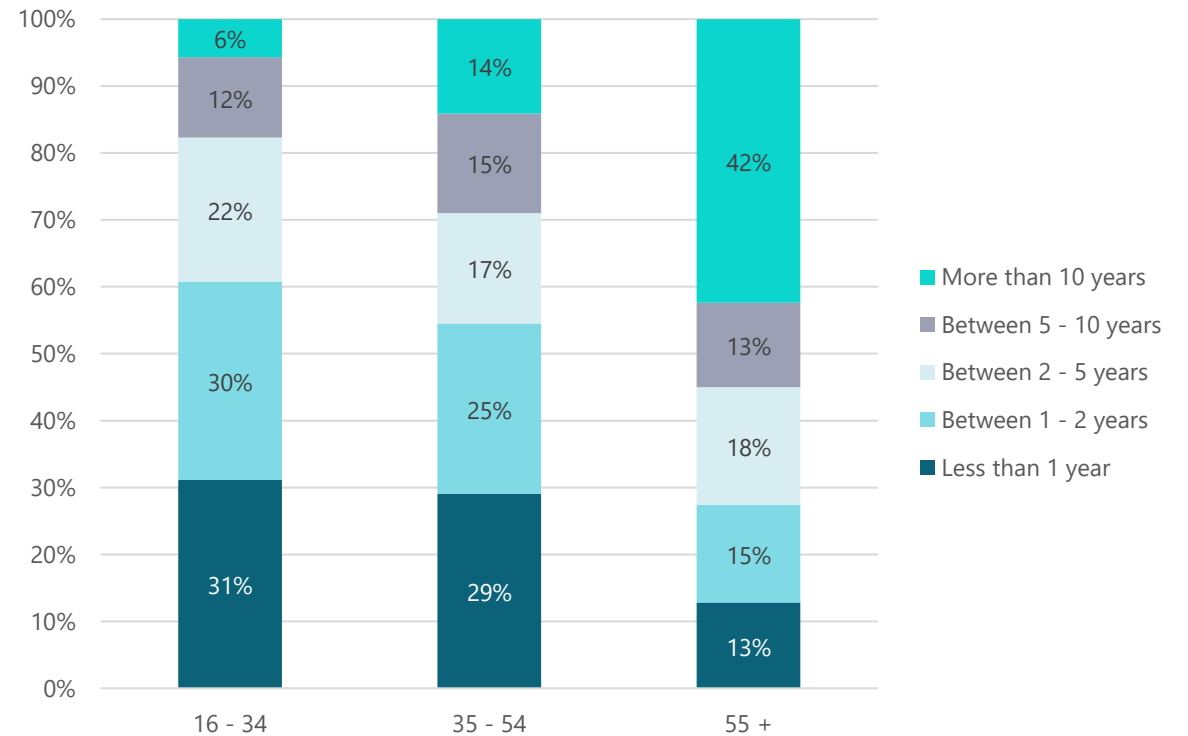
This chart shows the relationship between age and time participating. The story is the same for the majority of activities, with younger people being more likely to be new to the sport

When started activity by age group – Small Sail Boat Activities & Canoeing/ Kayaking

Small Sailboat Activities



Canoeing / Kayaking



Question: How many years has it been since you **started participating** in each the following activities?

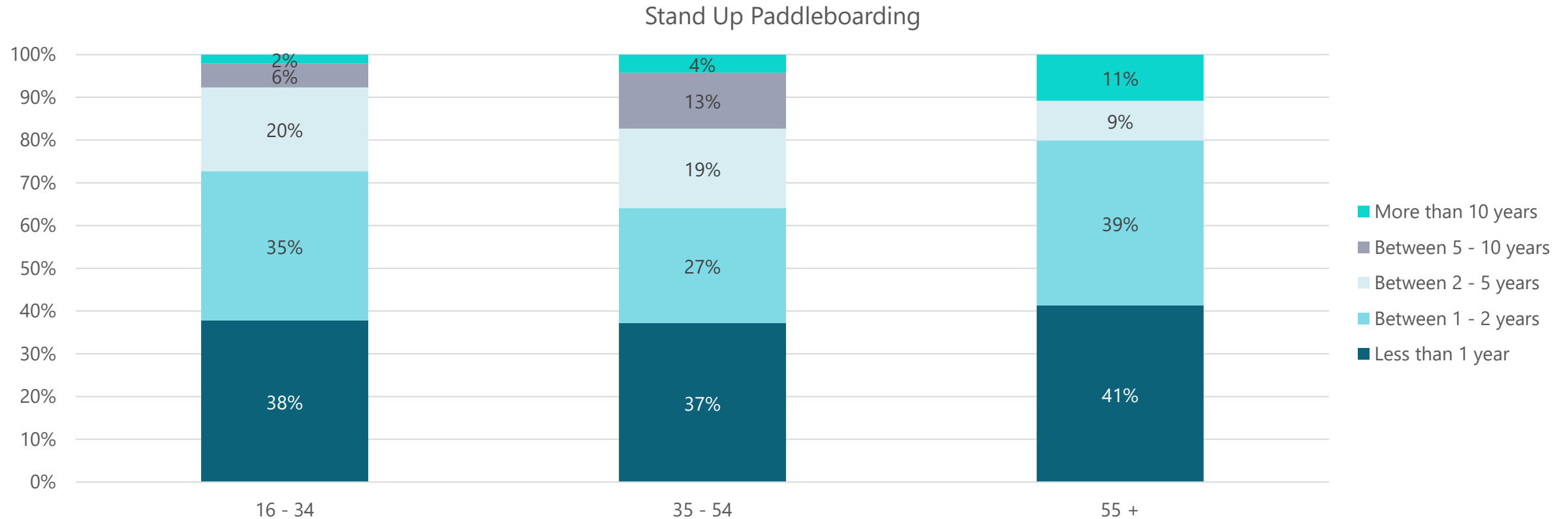
Base: all respondents for bespoke section (2,338)

Weighting: Demographic

Small sailboat is defined as: a dinghy, day boat or other small keelboat, usually taken out of water at end of use

Paddle boarding shows a different trend, with all age groups being likely to have started the sport within the past 5 years

When started activity by age group – Stand up paddle boarding



Question: How many years has it been since you **started participating** in each the following activities?
Base: all respondents for bespoke section (2,338)
Weighting: Demographic

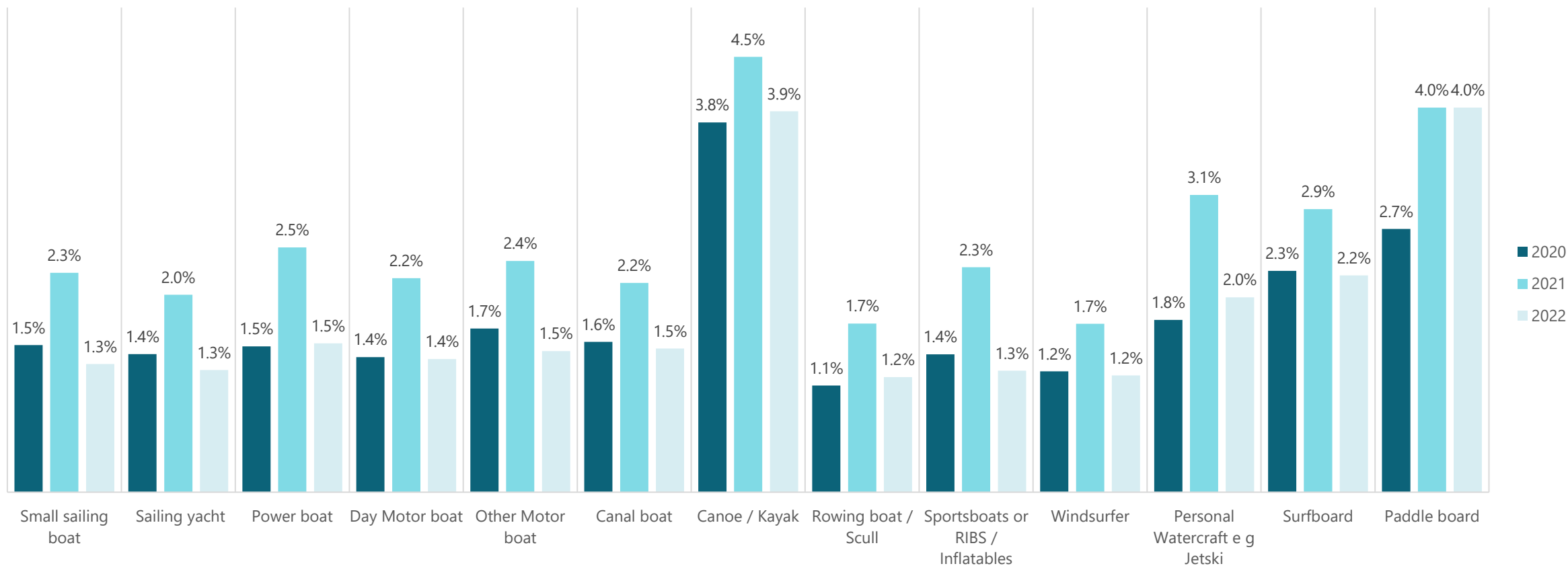


BOAT AND WATERCRAFT OWNERSHIP



Boat and watercraft ownership has dropped across most types to the level seen in 2020. The exception is paddle boards that have maintained their ownership level in 2022. It is the smaller and potentially cheaper craft that are most likely to be owned.

Boat and watercraft ownership



Question: Which of the following types of boat and watercraft does your household own in the UK or abroad? And how many of these boats does your household own?

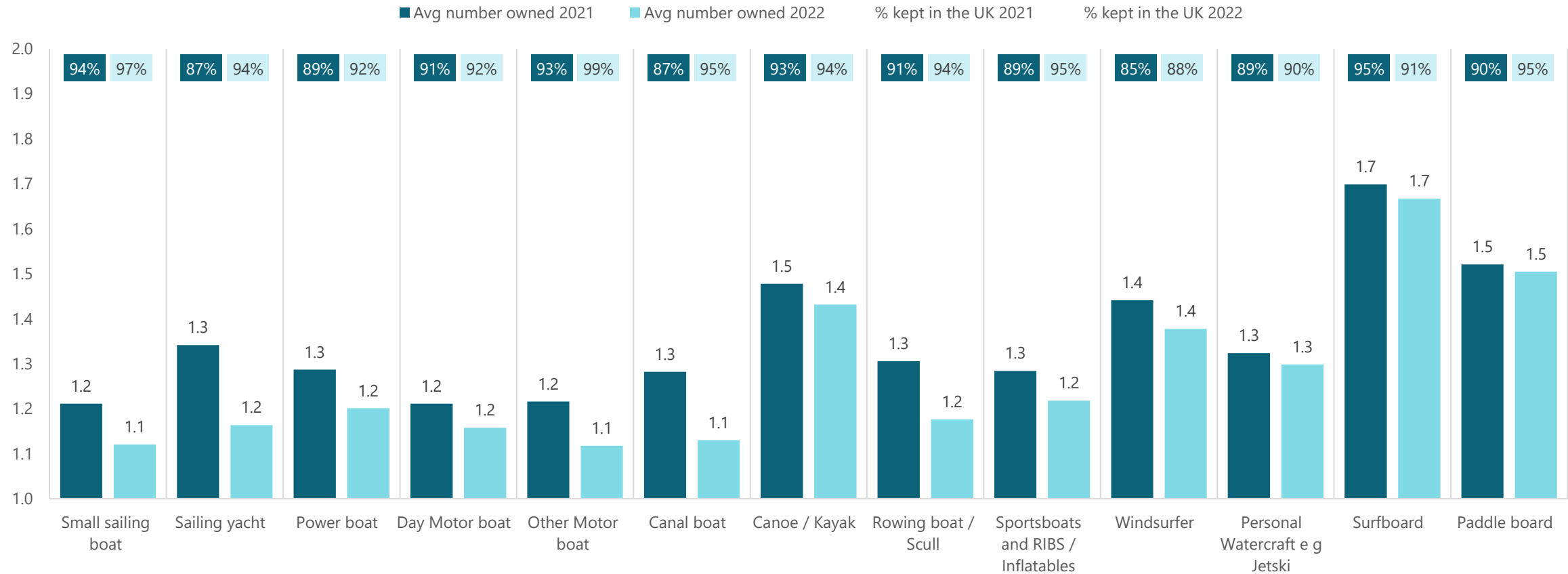
Base: all respondents (2022: 12,717; 2021, 12,010; 2020: 12,008)

Weighting: Demographic

Small sailboat is defined as: a dinghy, day boat or other small keelboat, usually taken out of water at end of use

Households owning surfboards on average will have 2, for all other crafts people are only likely to own one. Almost all types of craft are kept in the UK, the most likely to be kept abroad are windsurfers.

Boat and watercraft ownership and kept in the UK



Question: Which of the following types of boat and watercraft does your household own in the UK or abroad? And how many of these boats does your household own? And how many of these boats owned by your household are **kept in the UK**?

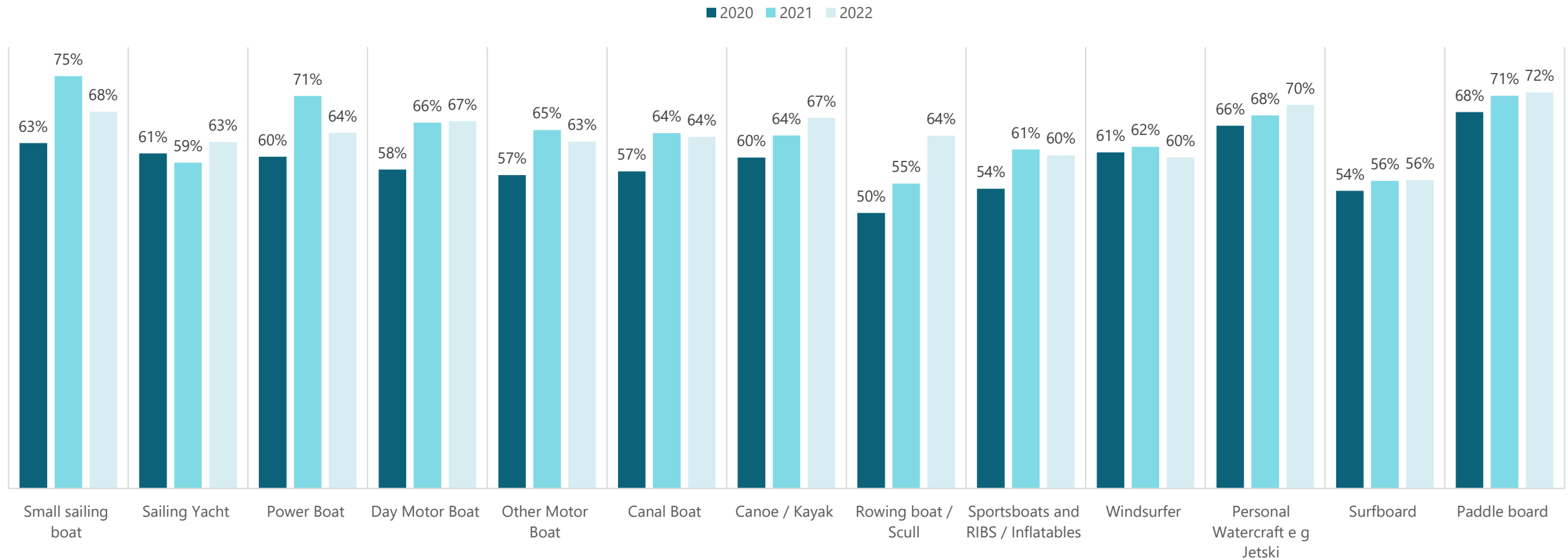
Base: all respondents (2022: 12,717; 2021, 12,010; 2020: 12,008)

Weighting: Demographic

Small sailboat is defined as: a dinghy, day boat or other small keelboat, usually taken out of water at end of use

First time ownership is highest for paddleboards, personal watercraft and canoes/ kayaks

First time ownership



Question: Which of the following types of boat and watercraft does your household own in the UK or abroad?

Base: all respondents (12,717)

Was the most recent watercraft you/ your household purchased the first one owned since starting the activity?

Base: all respondents for bespoke section (2,338)

Weighting: Demographic

Small sailboat is defined as: a dinghy, day boat or other small keelboat, usually taken out of water at end of use

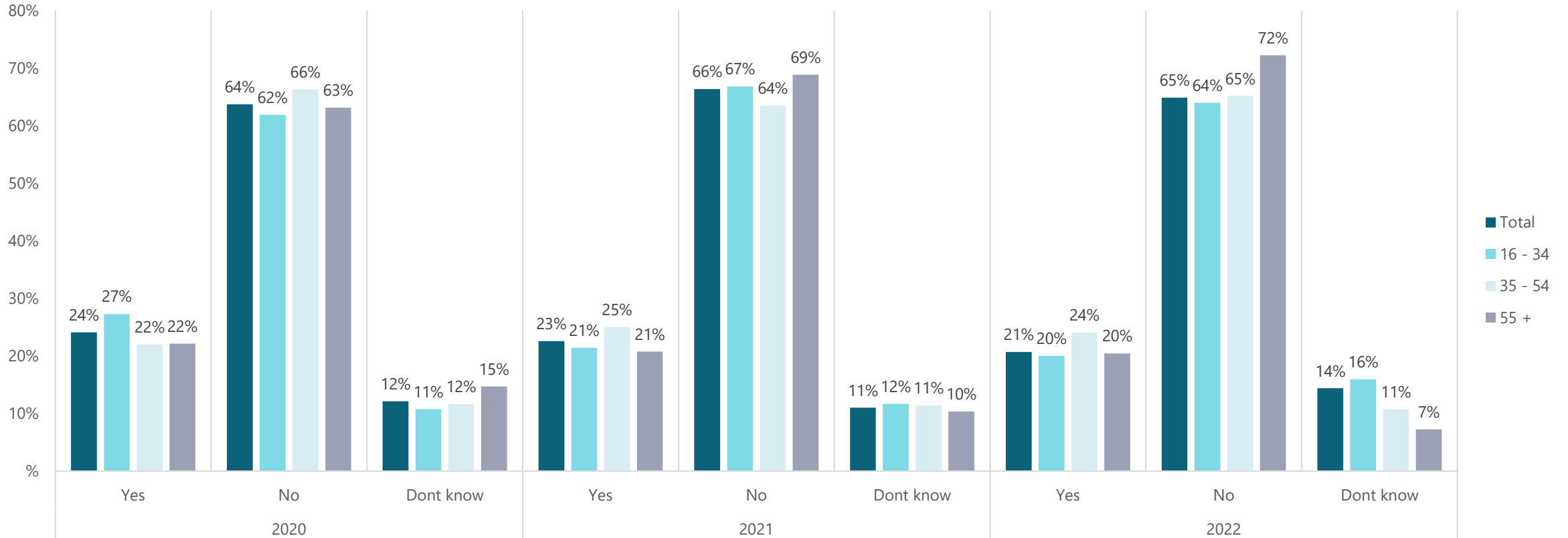


SAFETY



Awareness of safety messages has declined slightly this year across all age groups.

Awareness of safety messages



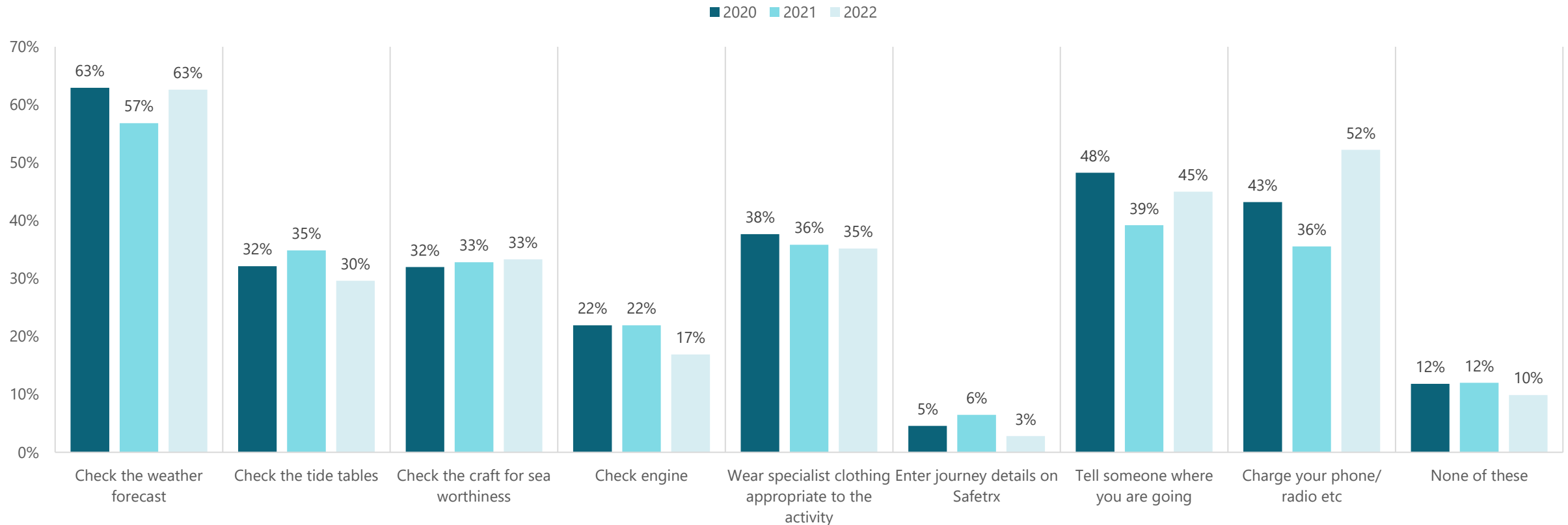
Question: Have you ever seen any public safety messages or received any advice in the last 12 months in relation to safe use of the sea/ coastline in the UK?

Base: all respondents for bespoke section (2,338)

Weighting: Demographic

Casual participation has risen slightly this year which has probably contributed to some of these pre activity categories declining as casual participants are more likely to rely on others to ensure a safe activity.

Precautions before taking part in any boating activity



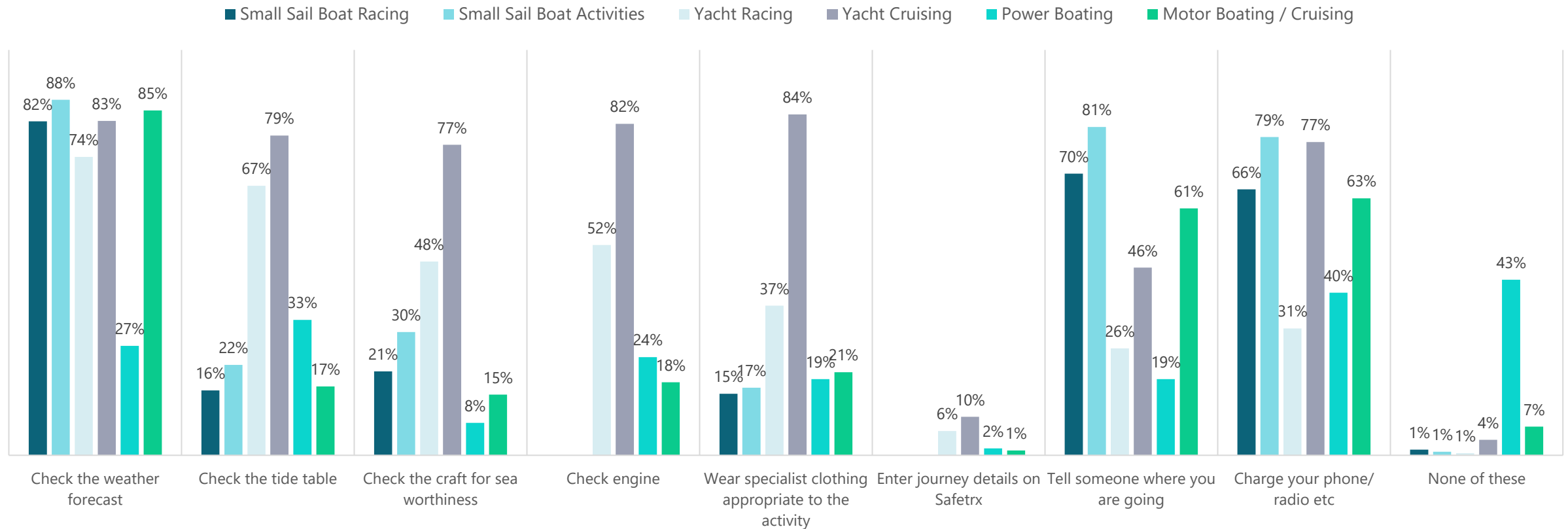
Question: Before participating in [activity] the last time did you...?

Base: All assigned activity in loop and safety check is relevant, sizes vary

Weighting: Demographic

Those power boating tend to take the fewest precautions.

Safety precautions by boating activity

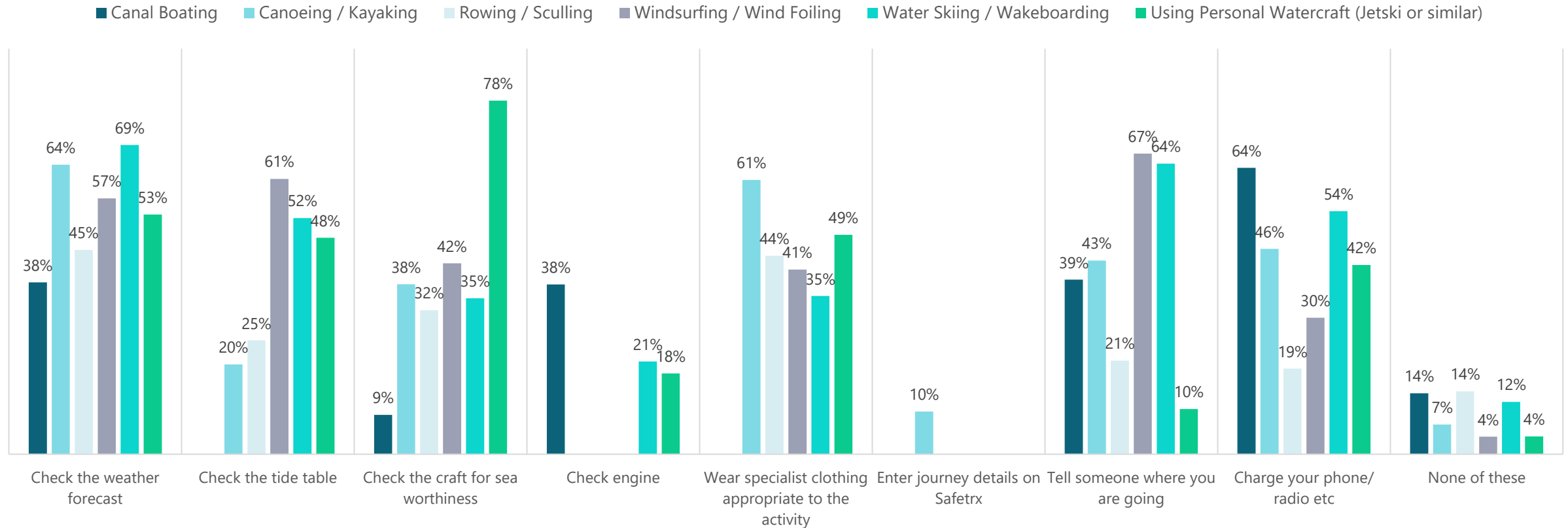


Question: Before participating in [activity] the last time did you...?
 Base: All assigned activity in loop and safety check is relevant, sizes vary
 Weighting: Demographic

Small sailboat is defined as: a dinghy, day boat or other small keelboat, usually taken out of water at end of use

Those activities more likely to be done at the coast are naturally likely to see participants check the weather forecast and the tide table. Checking the weather forecast appears more important than the tide table for inland activities, such as canoeing/kayaking.

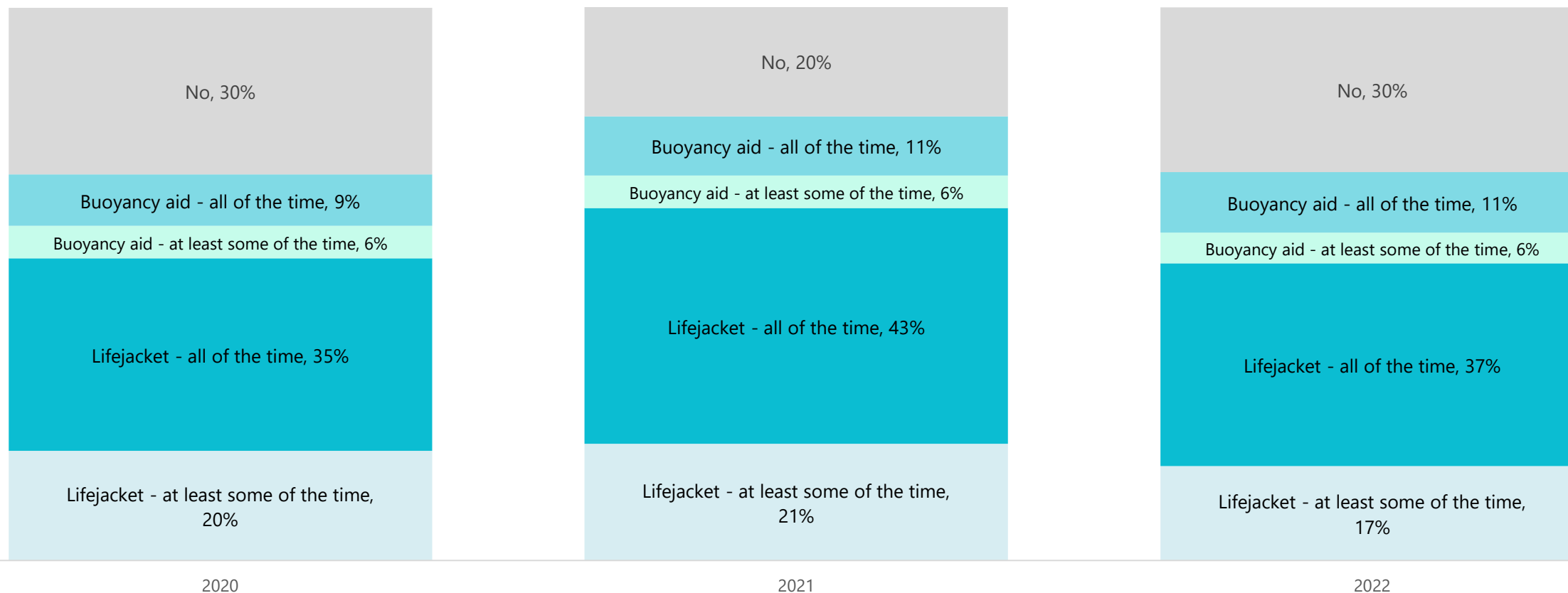
Safety precautions by boating activity



Question: Before participating in [activity] the **last time** did you...?
 Base: All assigned activity in loop and safety check is relevant, sizes vary
 Weighting: Demographic

Lifejacket or buoyancy aid wearing is back to levels seen in 2020 after an increase in wear last year.

Lifejacket and buoyancy aid wearing for any activity



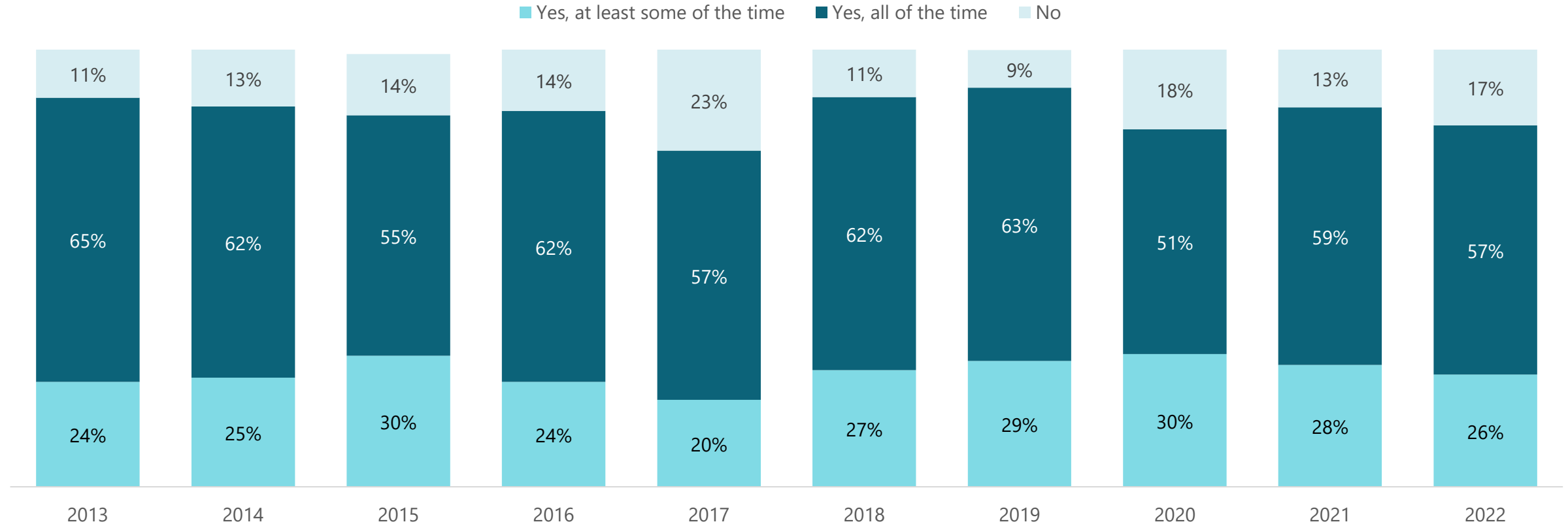
Question: Did you wear a lifejacket or buoyancy aid the last time you participated in [activity]?

Base: All assigned activity in loop, sizes vary

Weighting: Demographic

83% of participants wore their lifejacket or buoyancy aid at least some of the time. This is a slight drop of 4 percentage points from the previous year.

Lifejacket and buoyancy aid wearing for any watercraft activity (excluding rowing)



Question: Did you wear a lifejacket or buoyancy aid the last time you participated in [activity]?

Base: All assigned activity in loop, sizes vary

Weighting: Demographic

Why did people not wear them all the time?

Common themes emerging from the comments

Felt unnecessary

Restriction of movement

Conditions calm

Lifejackets on craft in case of emergency

Activity was close to the shore

Strong swimmer

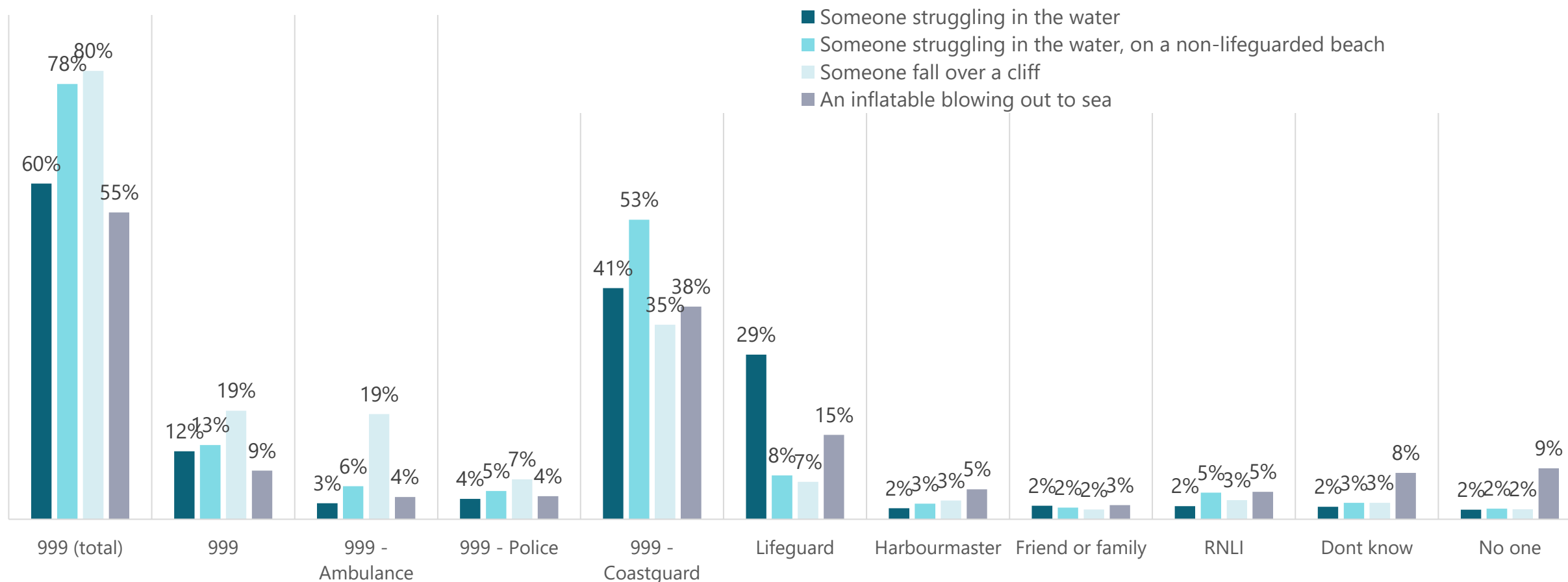
Wasn't in the water / was on the shore

I felt safe without one

Not needed for sport

The majority of people would call 999 for all incidents, with most of those knowing to ask for the Coastguard. There is a higher proportion stating they don't know who to contact or they would not contact anyone.

Reactions to incidents at the coast



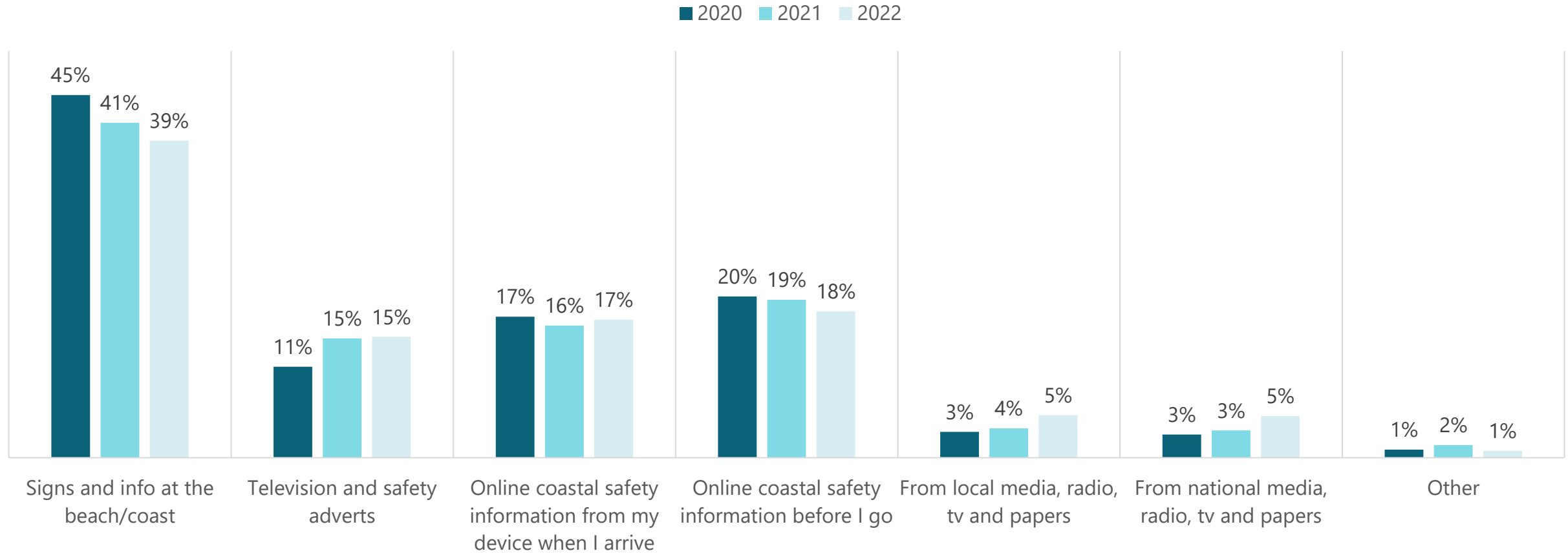
Question: Who would you call in each situation if you saw the following along the coast?

Base: all respondents for bespoke section (2,145)

Weighting: Demographic

Signs at the beach/ coast is still the preferred method for receiving safety information but there does seem to be a gradual increase in a preference for media campaigns.

Preferred source for coastal safety information



Question: Where would you prefer to get coastal safety information?
Base: all respondents for bespoke section (2,145)
Weighting: Demographic

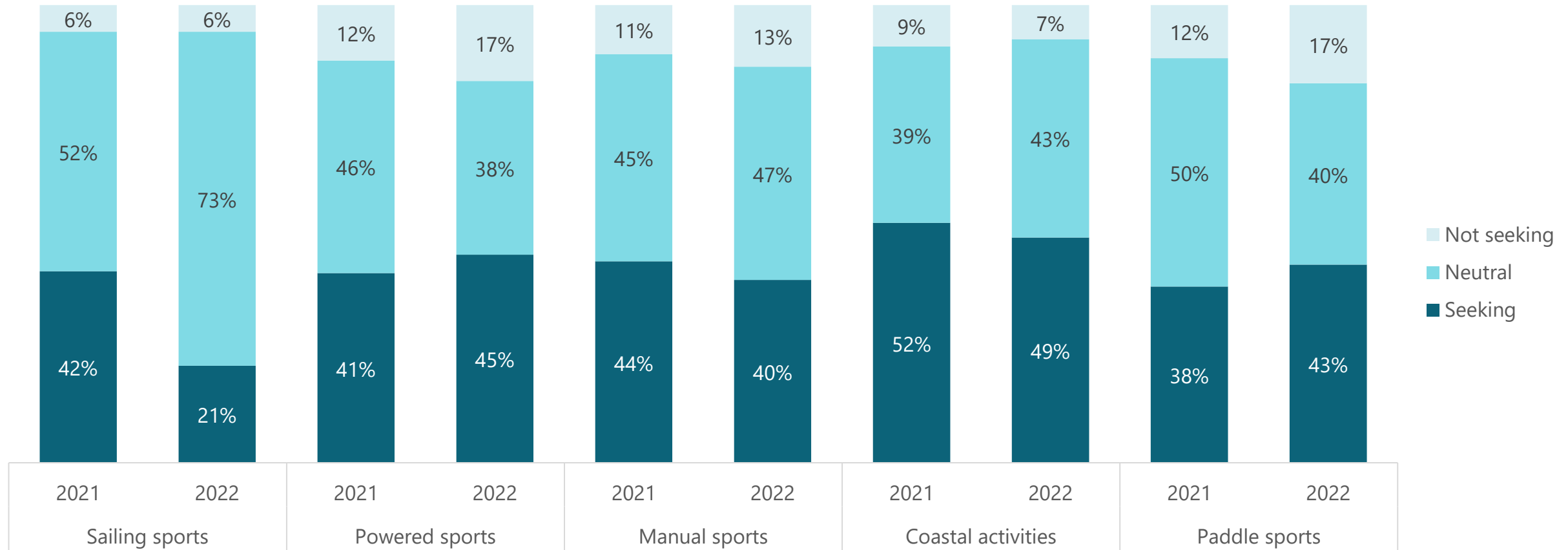


MOTIVATIONS FOR PARTICIPATING



People participating in coastal activities are the most likely to be doing so to improve their mental or physical health. People doing sailing sports are the least likely this year

% of respondents seeking improved sense of wellbeing



Question: When undertaking [activity] in the UK, to what extent are you seeking the following... **Sense of wellbeing (improving mental or physical health)?**

Base: All assigned activity in loop, sizes vary

Weighting: Demographic



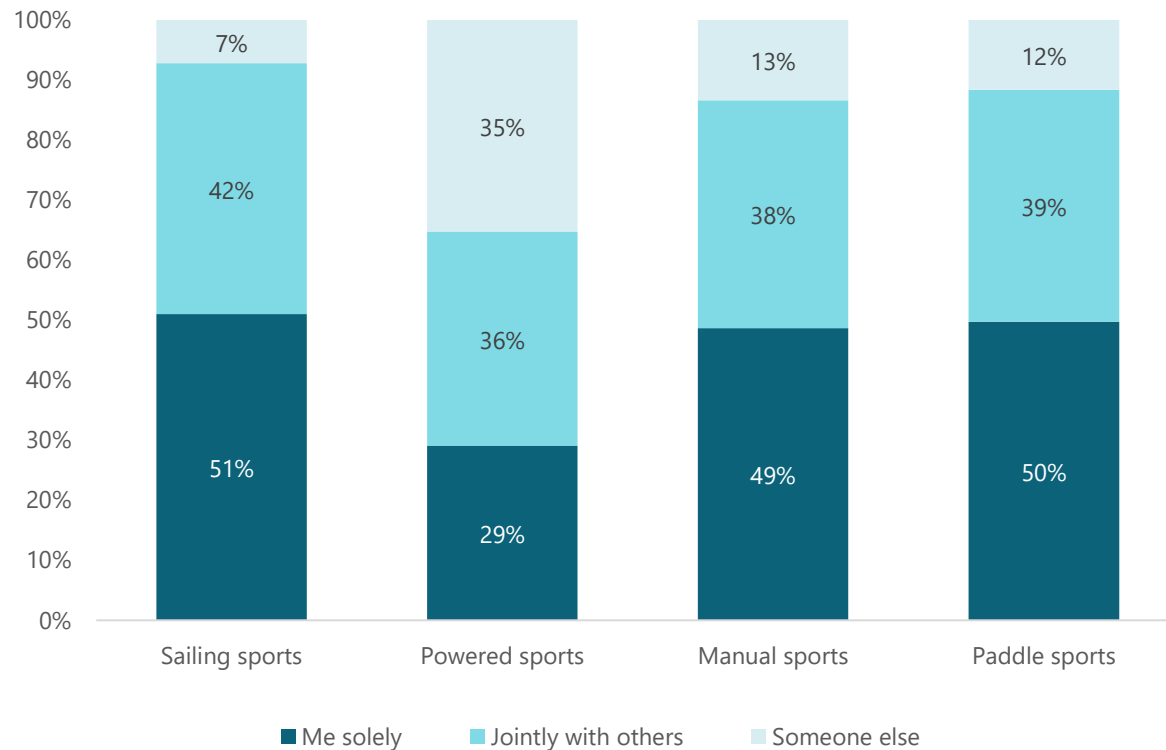
DETAILS OF LAST ACTIVITY



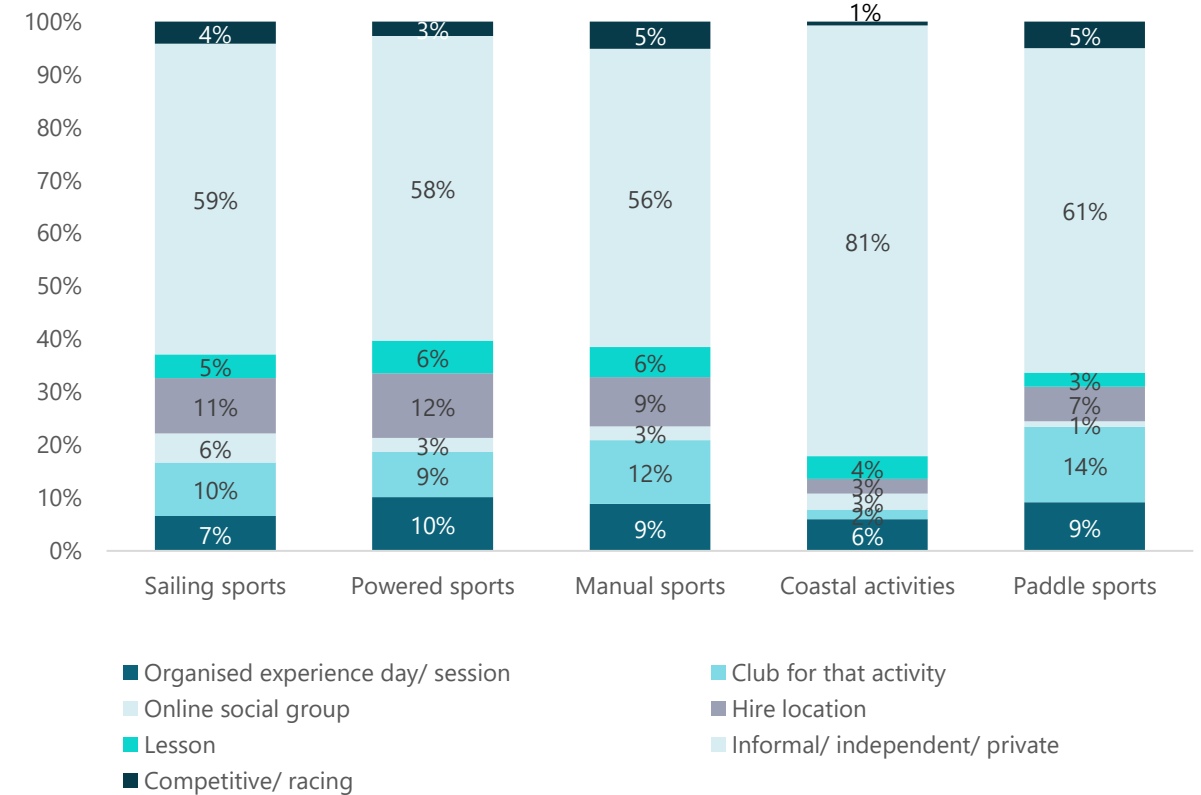
Powered sports or angling/ fishing are the most sociable. Most activities are done in an informal/ independent session.

Details of last activity

Who was in charge of the craft



Type of experience



* Coastal activities not included as no craft based activities within this category

Question: Which of the following best describes how you participated in [insert activity] last time you participated?

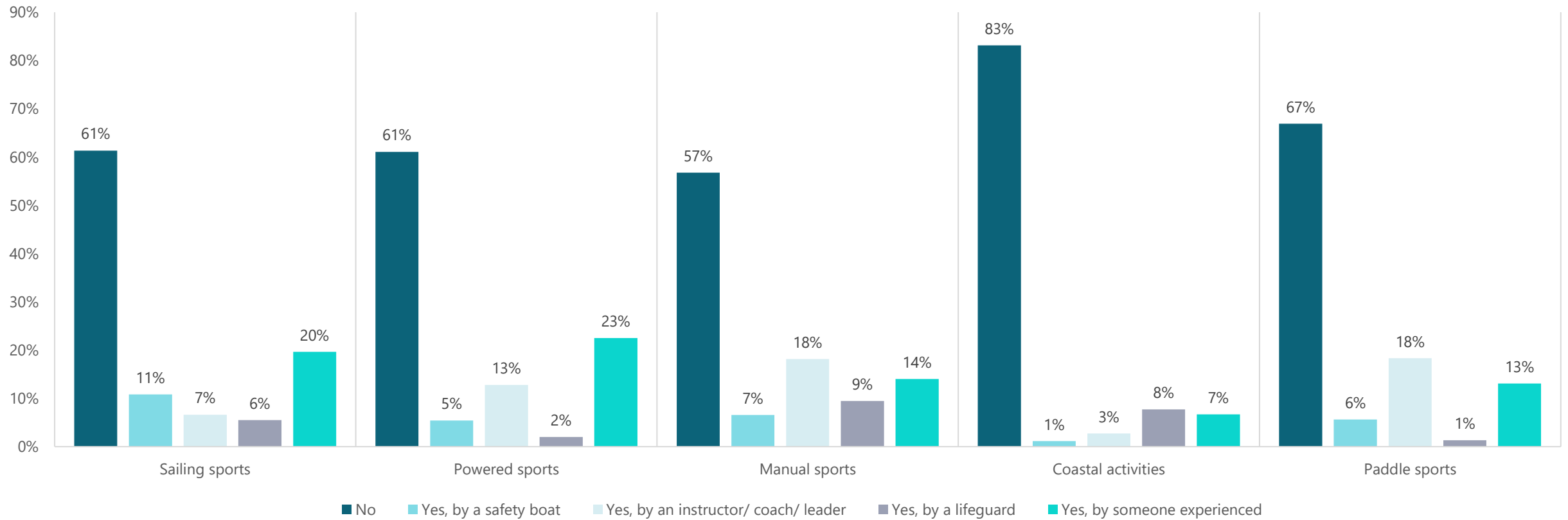
Base: All assigned activity in loop, sizes vary

Weighting: Demographic

Manual sports have the highest level of supervision, mostly by an instructor or coach

Details of last activity

Was there any supervision



Question: Which of the following best describes how you participated in [insert activity] last time you participated? (Multiple choice options for 'Was there any supervision')

Base: All assigned activity in loop, sizes vary

Weighting: Demographic

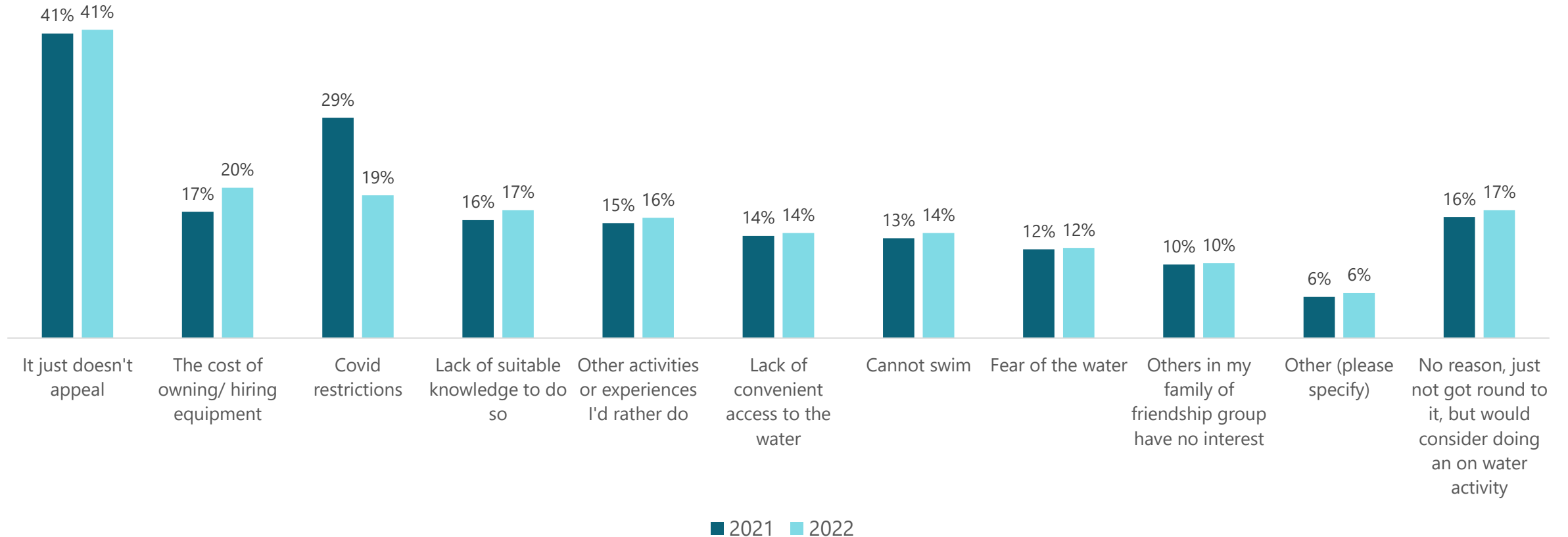


REASONS FOR NON PARTICIPATION



Lack of appeal continues to be the biggest reason for non-participation. As we would expect, fewer people mention COVID restrictions, but more people mention the cost.

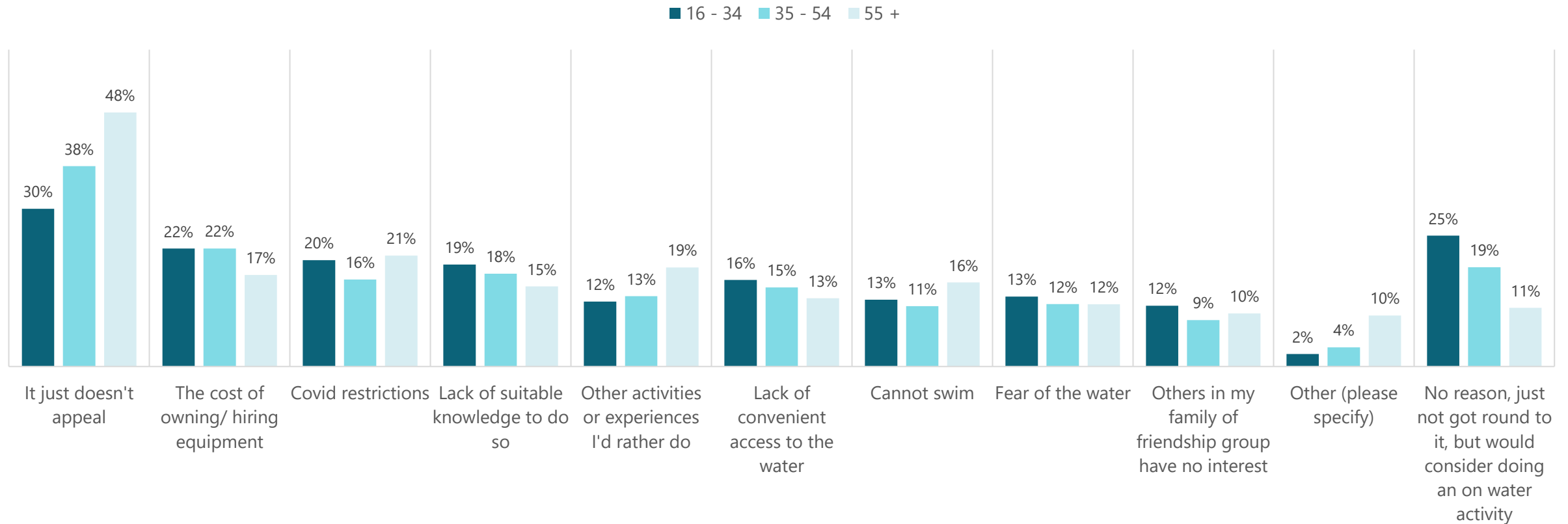
Reasons for non-participation



Question: Which of the following best describes why you did not take part in any on water activities in the past year
Base: All who did not participate in an activity on the water (8450)
Weighting: Demographic

Cost is less of a concern for the older age group. Younger people seem to be more open to trying new activities, but haven't had the chance.

Reasons for non-participation by age group



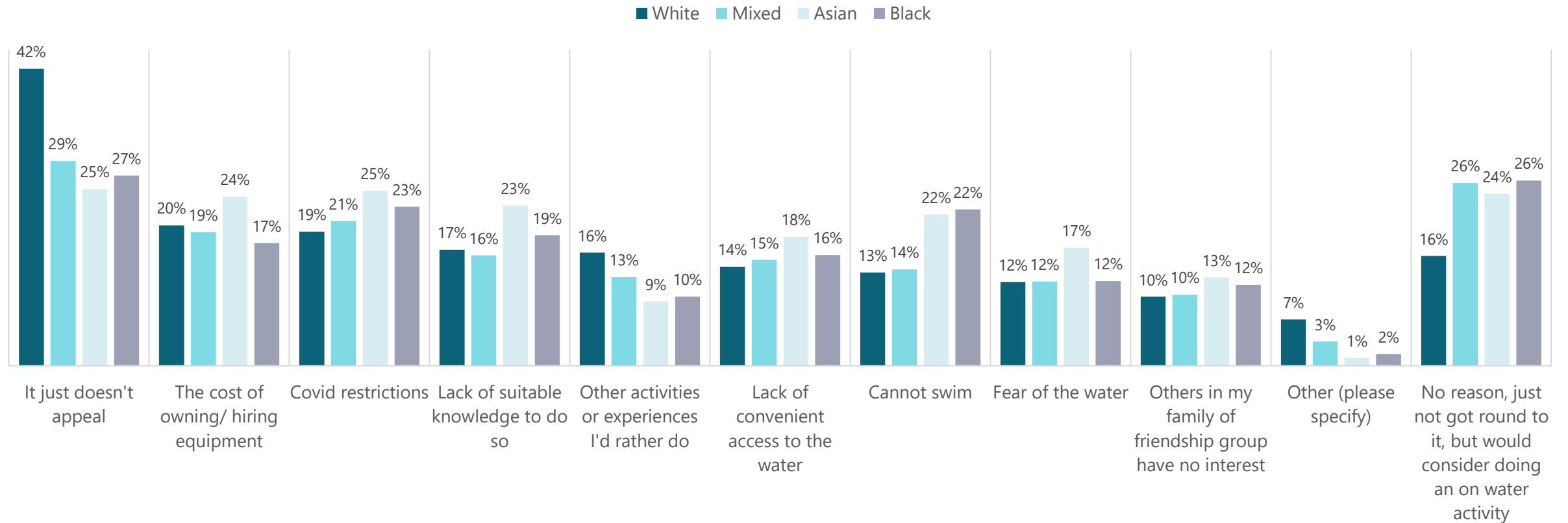
Question: Which of the following best describes why you did not take part in any on water activities in the past year

Base: All who did not participate in an activity on the water (8450)

Weighting: Demographic

Not being able to swim is a bigger barrier for Asian and Black ethnic groups.

Reasons for non-participation by ethnicity



Question: Which of the following best describes why you did not take part in any on water activities in the past year
 Base: All who did not participate in an activity on the water (8450)
 Weighting: Demographic

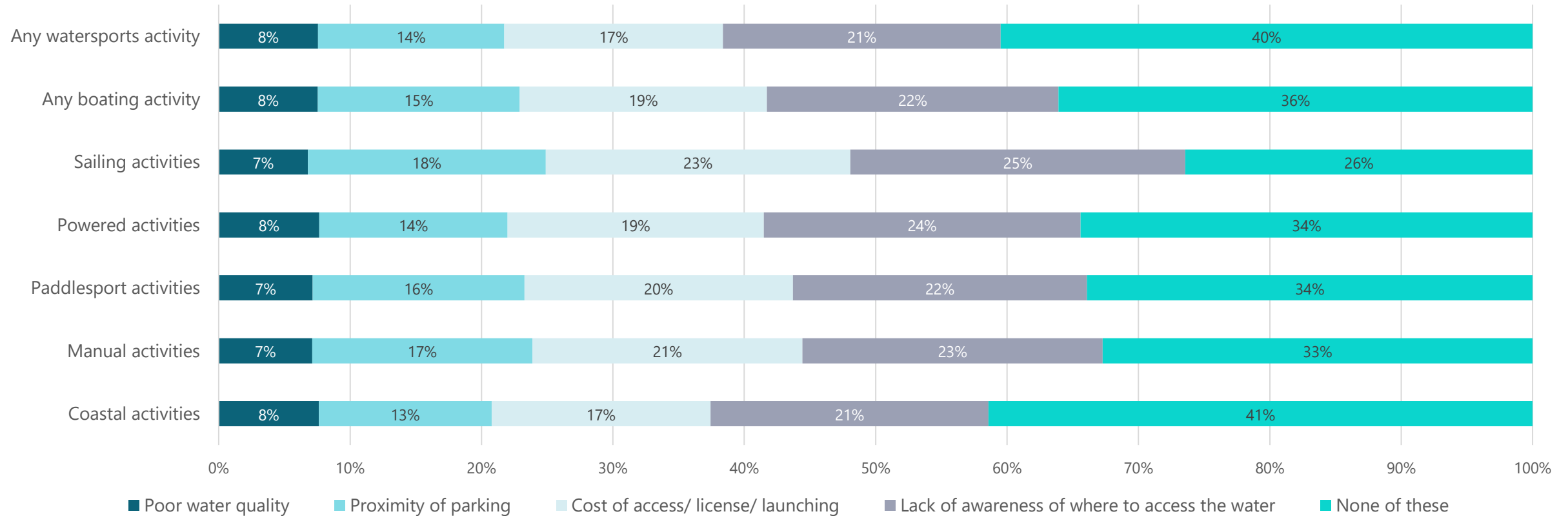


PROBLEMS ACCESSING THE WATER

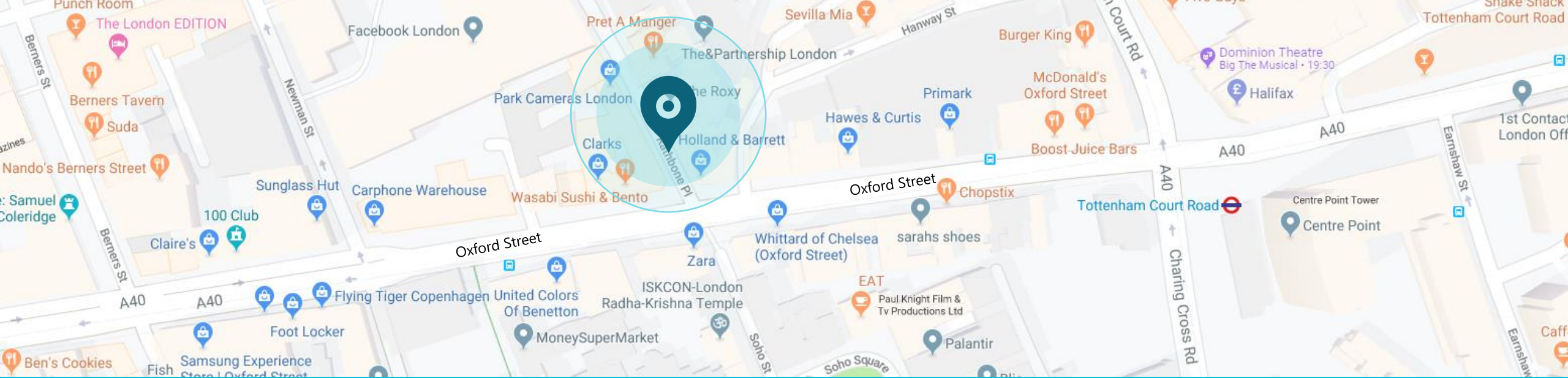


Anglers and sailors have the most barriers to accessing the water, and report similar issues to each other. Most reported lacking awareness of where to access and cost of access as barriers. Parking was also a greater issue for these groups.

Problems accessing the water



Question: Thinking generally, what, if any, problems have you encountered in accessing the water?
 Base: All UK bespoke participants (2145)
 Weighting: Demographic



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