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Watersports Participation Survey 2021

February 2022

Introduction

Welcome to the report of the 2021 Watersports Participation Survey.

This survey covers participation from October 2020 to September 2021, a full year in which the UK was dealing with the Covid pandemic. This year, restrictions on international travel were more severe than the previous year (when we had half a year pre-covid, so no restrictions) which has had an impact on where people are participating.

Lack of international holidays means that many were making lockdown purchases. Anecdotal evidence from the industry suggests that the boat manufacturers are struggling to keep up with demand for crafts.

This is also the second year in which the methodology has been purely online for the market sizing element due to a lack of face to face interviews being available because of covid. We know we get a more active group of people in an online survey compared to face to face surveys but these results are comparable against last year, which used the same methodology.

We added some questions to the survey which would provide us with a comparison against known volumes for a couple of activities. The estimates coming out of this survey are greater than these known volumes. We are interviewing a subset of the market, who is online and active. When the survey results are extrapolated to a national level, the result is an over estimate compared to known volumes. Unfortunately we don't have known volumes of all activities otherwise it would be possible to weight to these levels.

What this survey does give us a good indication of is the type of people who are participating, how frequently, and how the market has changed compared to last year.

The bespoke questions have always been asked online so there is no change to the methodology or sampling for these and the results show an element of consistency and can be reliably used for longer term trend analysis.

Important considerations for this report

In terms of weighting the data, this is done using the nationally representative proportions of age, gender, region and social grade. This has remained consistent across the years.

Participation levels from 2020 to 2021 have increased for many of the boating activities but it would seem that the trend is more infrequent, experiential participants are taking part.

As such, the early part of this report splits out the infrequent participants (those taking part once or twice over the year) from the more frequent participants (those taking part 3 or more times over the year) as this is where the biggest differences are observed. We are seeing consistency in the participation of those who partake in an activity 3 or more times but a large increase in those partaking in an activity once or twice.

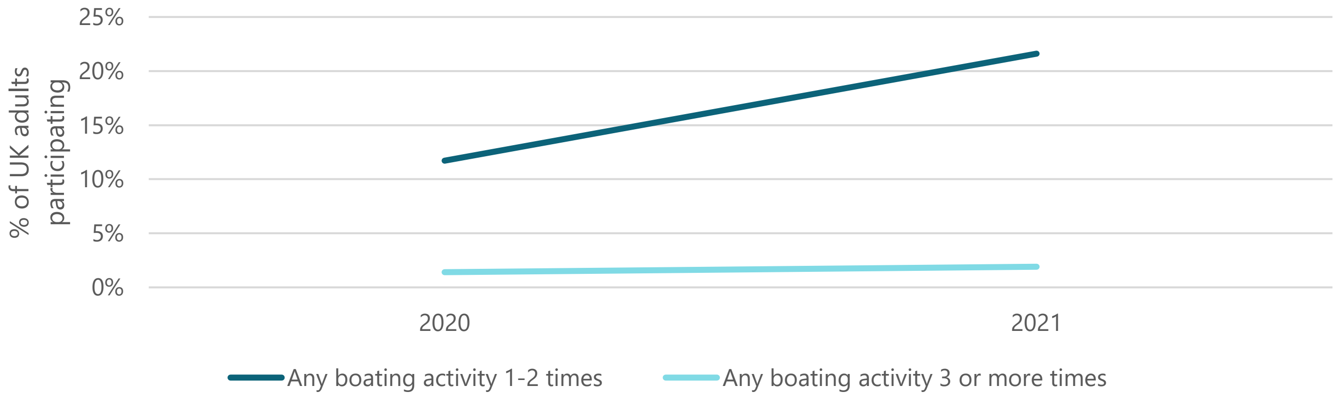
Splitting the results by frequency allows us to monitor changes in these groups over time and allow the consortium members to report on their frequent participants without the large proportion of casual participants skewing the volumes.

Where this survey should be used is to monitor how participation has changed compared to last year – changes will be accurate as the sampling is consistent across both years.

Volumes are shown in this report, but due to the change in methodology, and the more active audience we get online, we would recommend these are used for information rather accurate market volume figures.

Casual participants have boosted participation in the UK

		Online method 2020	Online method 2021
Any boating activity	1-2 times	11.7%	21.6%
	3 or more times	1.4%	1.9%
Sailing activities	1-2 times	4.1%	11.4%
	3 or more times	0.2%	0.6%
Powered activities	1-2 times	8.0%	16.7%
	3 or more times	0.6%	0.8%
Manual activities	1-2 times	8.3%	15.4%
	3 or more times	1.4%	1.9%
Paddlesport activities	1-2 times	7.0%	13.4%
	3 or more times	0.9%	1.3%
Coastal activities	1-2 times	39.4%	46.7%
	3 or more times	20.3%	16.5%



UK participation has seen massive growth in the infrequent category, while the more regular participation has remained relatively static.

The change to an online method in 2020 does pick up more active people than a face to face survey but we have also seen the covid effect, with more people confined to the UK for their holidays and leisure time.

There has also been a trend towards an experience culture, especially among younger age groups. There is less emphasis on what you own and more about what you have done for many.

The growth in volume is across both frequency groups but significantly for the infrequent category

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11.7m individuals stated they participated in any boating activity 1 or 2 times in the UK in 2021. This has jumped by almost double over the 2020 figure and this is likely due to the covid effect.

People have been largely stuck in the UK for their holidays in 2021, and with money saved from the lockdowns and lack of international travel, many have taken to undertaking experiences in the UK.

The more frequent participants (3+ times) for on water activities have increased slightly but not to the same level as the infrequent participants.

This again highlights the experience culture of people trying new activities, as there are plenty on offer, but getting people to take it up more frequently is the challenge for many of the development organisations.

Volume of participants undertaking activity in the UK (000's)

		Online method	
		2020	2021
Any boating activity	1-2 times	6,305	11,753
	3 or more times	765	1,006
Sailing activities	1-2 times	2,206	6,175
	3 or more times	134	351
Powered activities	1-2 times	4,339	9,095
	3 or more times	337	452
Manual activities	1-2 times	4,515	8,359
	3 or more times	774	1,048
Paddlesport activities	1-2 times	3,785	7,272
	3 or more times	508	714
Coastal activities	1-2 times	21,337	25,406
	3 or more times	10,975	8,992

Participation rates and volumes have increased across all sports, particularly in the casual frequency category. Just over 1m people took part in any boating activity 3 or more times in 2021.

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Participation proportion and volume of participants for sailing activities in the UK

		Participation rate		Volume of participants (000s)	
		Online method		Online method	
		2020	2021	2020	2021
Any boating activity	**1-2 times**	**11.7%**	**21.6%**	**6,305**	**11,753**
	3 or more times	**1.4%**	**1.9%**	**765**	**1,006**
Sailing activities	**1-2 times**	**4.1%**	**11.4%**	**2,206**	**6,175**
	3 or more times	**0.2%**	**0.6%**	**134**	**351**
Small Sail Boat Racing (Dinghies)	1-2 times	1.1%	3.6%	574	1,936
	3 or more times	0.0%	0.1%	24	70
Small Sail Boat Activities (Dinghies)	1-2 times	2.2%	6.7%	1,166	3,627
	3 or more times	0.1%	0.2%	58	135
Yacht Racing	1-2 times	0.9%	2.8%	504	1,543
	3 or more times	0.0%	0.1%	15	55
Yacht Cruising	1-2 times	1.8%	5.1%	967	2,783
	3 or more times	0.1%	0.2%	46	106
Windsurfing / Wind Foiling	1-2 times	1.2%	4.0%	656	2,155
	3 or more times	0.0%	0.1%	14	76

Question: Which of these activities you have taken part in within the **past year** in the UK?
Base: all respondents (12,000 per year)
Weighting: Demographic

Users of personal watercraft showed the largest volume increase this year. This is likely helped by the covid effect and people being restricted in their international travel.

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Participation proportion and volume of participants for powered activities in the UK

		Participation rate		Volume of participants (000s)	
		Online method		Online method	
		2020	2021	2020	2021
Powered activities	**1-2 times**	**8.0%**	**16.7%**	**4,339**	**9,095**
	3 or more times	**0.6%**	**0.8%**	**337**	**452**
Canal Boating	1-2 times	2.0%	5.2%	1,072	2,844
	3 or more times	0.2%	0.2%	98	118
Power Boating	1-2 times	3.4%	8.4%	1,822	4,553
	3 or more times	0.2%	0.2%	105	85
Motor Boating / Cruising	1-2 times	4.0%	7.7%	2,164	4,202
	3 or more times	0.2%	0.2%	121	126
Using Personal Watercraft (Jetski or similar)	1-2 times	2.4%	6.1%	1,313	3,312
	3 or more times	0.0%	0.3%	18	166
Water Skiing / Wakeboarding	1-2 times	1.3%	2.9%	704	1,567
	3 or more times	0.1%	0.1%	45	75

Question: Which of these activities you have taken part in within the **past year** in the UK?
Base: all respondents (12,000 per year)
Weighting: Demographic

Manual sports, and paddlesports in particular continue to show strong growth.

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Participation proportion and volume of participants for manual activities in the UK

		Participation rate		Volume of participants (000s)	
		Online method		Online method	
		2020	2021	2020	2021
Manual activities	**1-2 times**	**8.3%**	**15.4%**	**4,515**	**8,359**
	3 or more times	**1.4%**	**1.9%**	**774**	**1,048**
Kitesurfing	1-2 times	0.9%	3.2%	511	1,740
	3 or more times	0.1%	0.2%	49	88
Kite Foiling	1-2 times	0.7%	2.5%	390	1,361
	3 or more times	0.0%	0.1%	7	75
Stand Up Surfing	1-2 times	1.7%	3.4%	922	1,838
	3 or more times	0.2%	0.3%	110	174
Body Boarding	1-2 times	2.3%	4.1%	1,237	2,204
	3 or more times	0.3%	0.4%	149	226
Leisure Sub Aqua Diving From The Shore	1-2 times	1.2%	2.1%	654	1,127
	3 or more times	0.2%	0.2%	102	93
Leisure Sub Aqua Diving From A Boat	1-2 times	1.2%	2.1%	640	1,130
	3 or more times	0.1%	0.2%	71	96
Paddlesport activities	**1-2 times**	**7.0%**	**13.4%**	**3,785**	**7,272**
	3 or more times	**0.9%**	**1.3%**	**508**	**714**
Canoeing / Kayaking	1-2 times	5.2%	10.4%	2,821	5,663
	3 or more times	0.5%	0.7%	285	390
Rowing / Sculling	1-2 times	1.3%	2.7%	727	1,484
	3 or more times	0.2%	0.2%	131	108
Stand Up Paddle Boarding	1-2 times	3.3%	6.2%	1,775	3,388
	3 or more times	0.3%	0.6%	171	327

Question: Which of these activities you have taken part in within the **past year** in the UK?
Base: all respondents (12,000 per year)
Weighting: Demographic

Regular participants in coastal activities reduced in numbers. This is most likely down to more things being open in 2021 compared to 2020, when many had to make do with the outdoors for their leisure activity in 2020.

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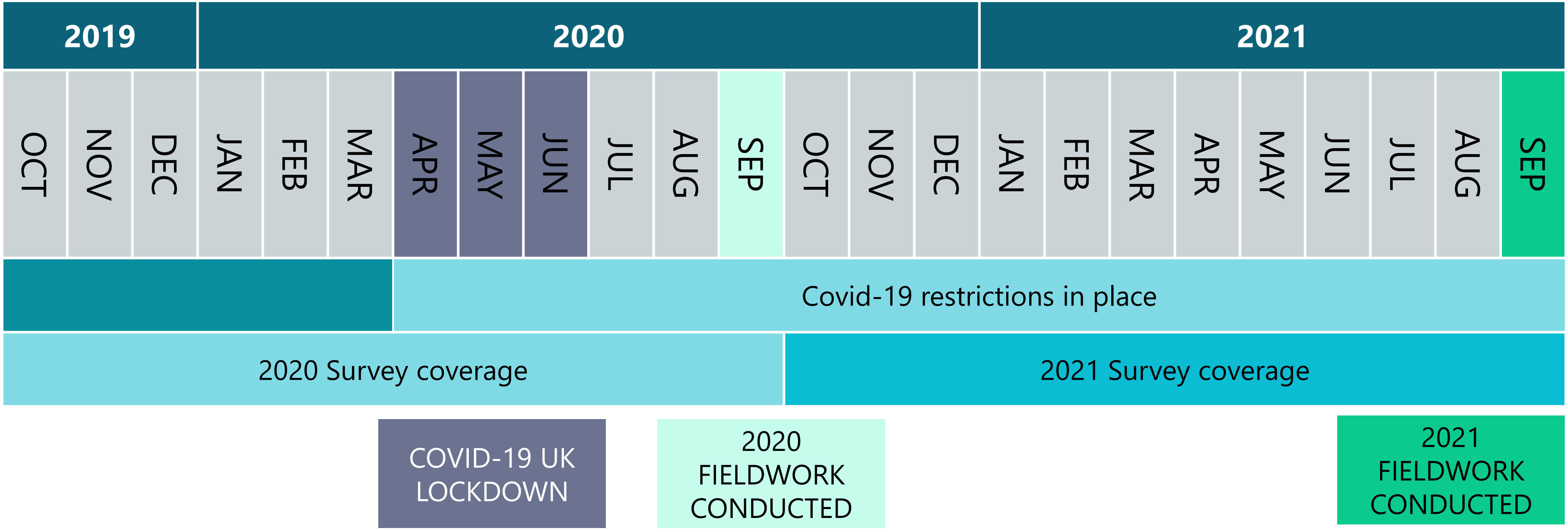
Participation proportion and volume of participants for coastal activities in the UK

		Participation rate		Volume of participants (000s)	
		Online method		Online method	
		2020	2021	2020	2021
Coastal activities	**1-2 times**	**39.4%**	**46.7%**	**21,337**	**25,406**
	3 or more times	**20.3%**	**16.5%**	**10,975**	**8,992**
Cliff Climbing (With Ropes)	1-2 times	2.8%	5.1%	1,521	2,766
	3 or more times	0.1%	0.3%	53	137
Cliff Climbing (Without Ropes)	1-2 times	2.9%	4.7%	1,575	2,566
	3 or more times	0.2%	0.2%	96	123
Scrambling (Without Ropes)	1-2 times	2.7%	4.6%	1,457	2,520
	3 or more times	0.3%	0.2%	144	121
Coastal Walking (as the purpose of the visit to the coast)	1-2 times	31.7%	35.8%	17,143	19,441
	3 or more times	10.3%	8.2%	5,548	4,484
Coastal Walking (as part of a visit to the seafront or coastal resort)	1-2 times	34.2%	38.0%	18,491	20,667
	3 or more times	9.7%	8.1%	5,267	4,421
Beachcombing	1-2 times	20.4%	20.8%	11,020	11,303
	3 or more times	3.3%	2.6%	1,779	1,402
Spending General Leisure Time At The Beach (Going Into / On The Sea)	1-2 times	32.4%	33.3%	17,550	18,104
	3 or more times	10.3%	7.6%	5,545	4,146
Spending General Leisure Time At The Beach (Not Going Into / On The Sea)	1-2 times	36.5%	40.3%	19,733	21,893
	3 or more times	12.2%	9.1%	6,614	4,955
Outdoor Swimming	1-2 times	16.7%	17.9%	9,054	9,711
	3 or more times	4.1%	3.2%	2,220	1,729
Coasteering	1-2 times	2.4%	3.0%	1,274	1,636
	3 or more times	0.2%	0.2%	117	131

Question: Which of these activities you have taken part in within the **past year** in the UK?
Base: all respondents (12,000 per year)
Weighting: Demographic

Research timeline

The last couple of years have been unique for the country. We have had restrictions in place since April 2020 but not had to endure such extreme national lockdowns as was seen in the first 3 months of the pandemic. Local restrictions and the tiering system at the start of 2021 means that there was wide variation is what individuals could do across all parts of the UK.
All this means that it is very difficult to compare what is happening in the market against a typical year without the pandemic.



Year on year trend

There has been an increase in participation across sailing, powered and manual activities, while coastal activity remained largely static.

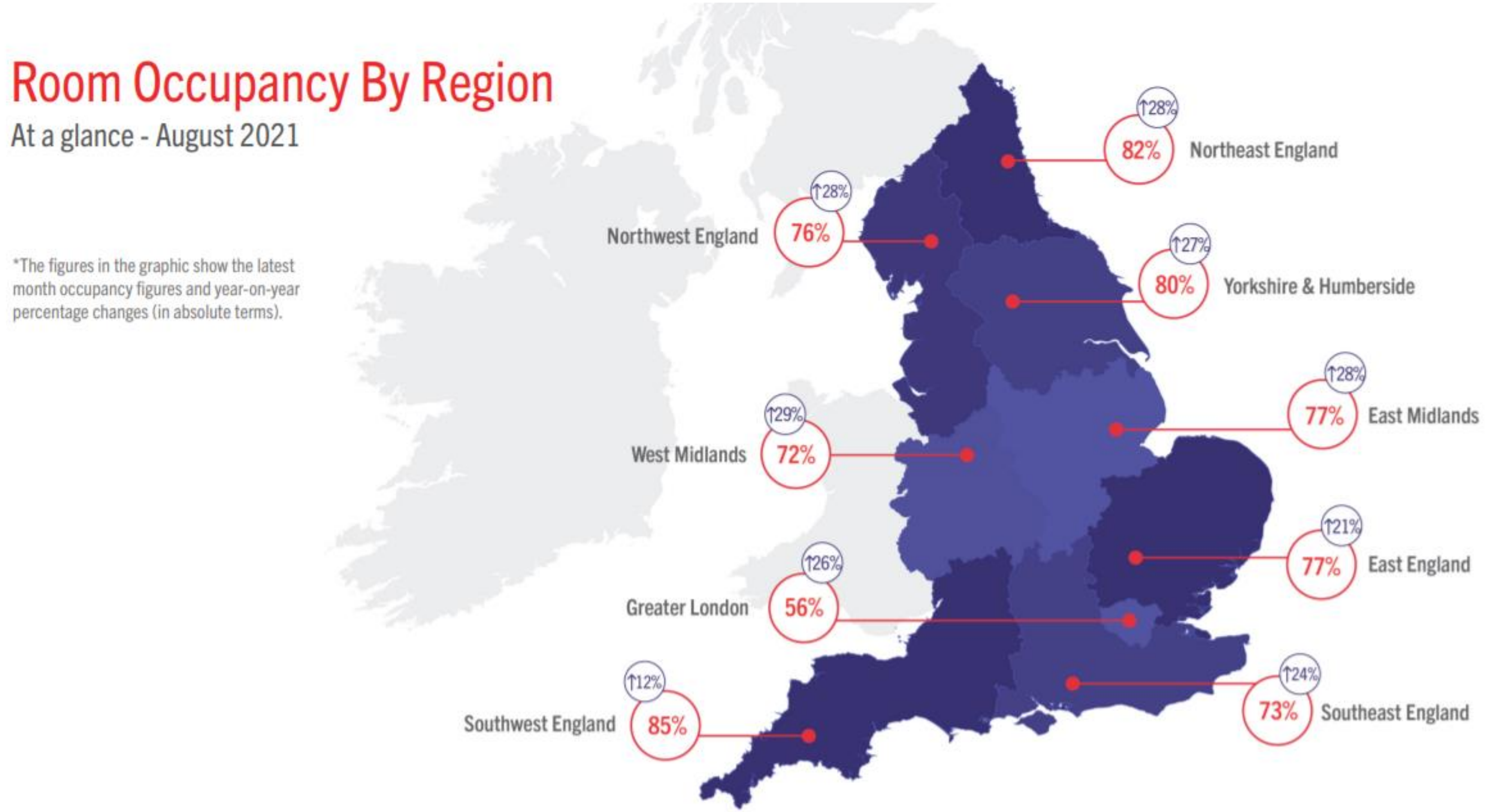
Anecdotally, this is in line with what the consortium members have been seeing; boating activities, marinas and watersports centres have been very busy this year as people have been largely holidaying in the UK due to severe restrictions on international travel.

Even with the spring lock down last year, the weather was particularly good in 2020 so many people were getting out and making the most of the good weather. Even if the weather was not so good this year, lots of people were still heading to the coast and participating in coastal and watersport activities.

Presenters Name

MARKET FACTORS

When international travel was restricted, coastal destinations faired well



Source: VisitEngland

People tended to head to outdoor destinations for the UK summer holidays

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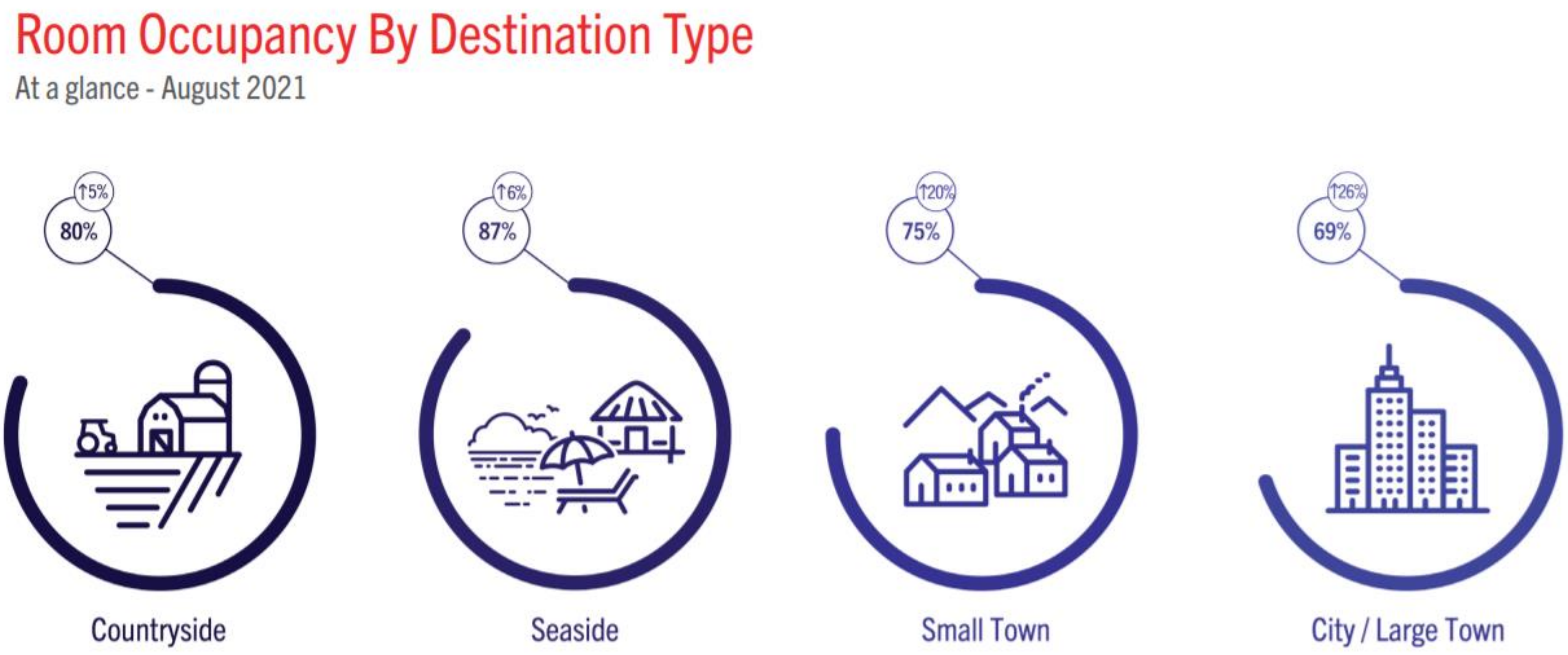


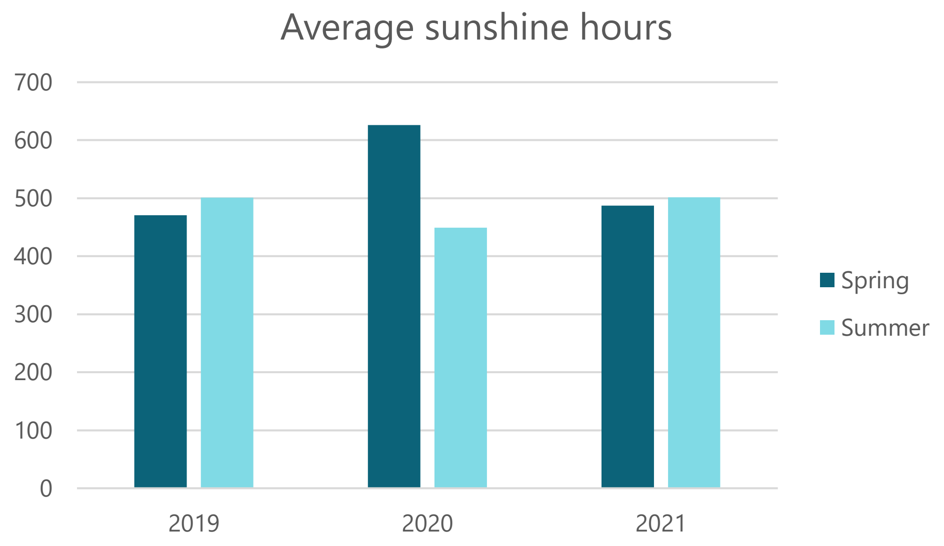
Source: VisitEngland

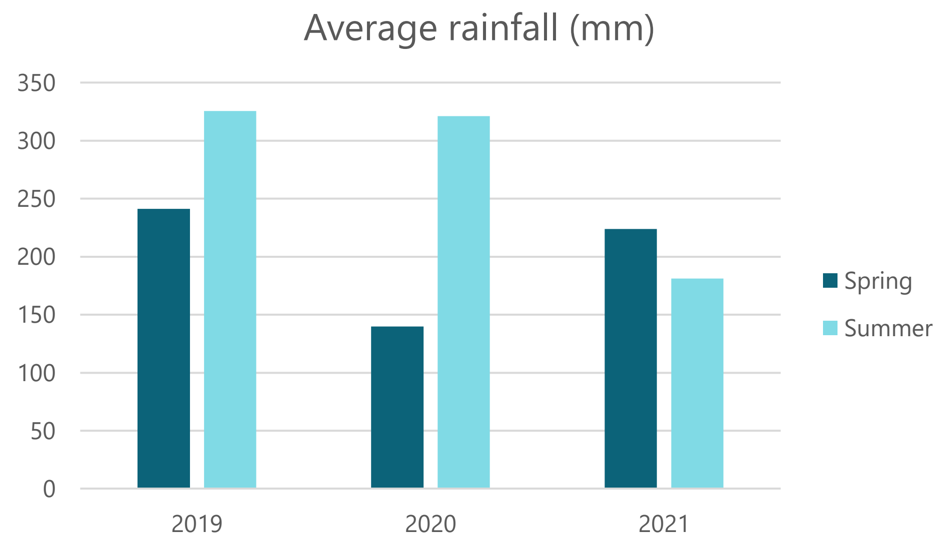
A drier summer in 2021 is likely to help improve the participation rate this year

We have seen in past years that good weather brings people outdoors and boating and watersports activities increase compared to times of poor weather. This is particularly prevalent for the coastal activities that have little or no equipment requirements to take part.

The key difference with previous years is that Spring 2021 was much wetter than 2020 but summer was drier.

This is likely to have negatively impacted activity rates in the springtime but positively impacted activity rates in the summer.





Data taken from the met office records:
http://www.metoffice.gov.uk/climate/uk/summaries/datasets

Lack of international travel means less opportunities to take part in watersport activities abroad

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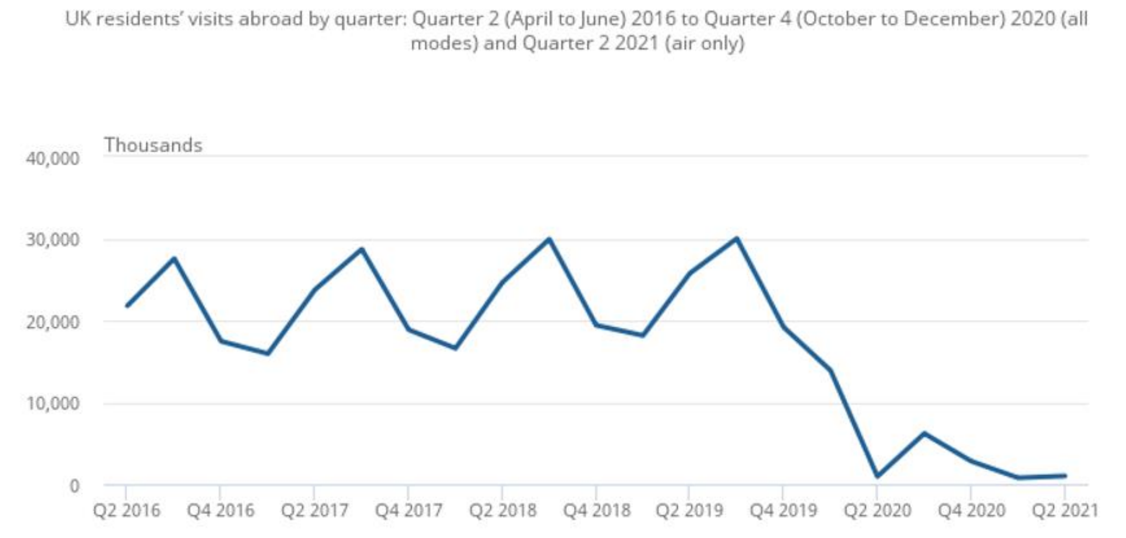
Beach holidays provide an opportunity for UK residents to participate in watersports activities, either in this country or overseas.

Data collection from ONS does not include the whole year for 2021 but the picture was not great with very few international trips in the first 2 quarters of 2021:



VisitBritain's domestic forecast for 2021 was to be up on 2020 levels but still only 61% of the levels seen in 2019. This increase was helped by the lack of international travel available for many.

Data taken from Visit Britain (Great Britain Tourism Survey):
http://www.visitbritain.org/insightsandstatistics/

The UK economy has been hit hard by the impacts of covid restrictions, particularly in the 2nd quarter of 2020. There has been continued improvement since Q2 2020 with positive growth in all but one quarter since then. This means there was less disposable income for many but also more time to enjoy activities due to not travelling.

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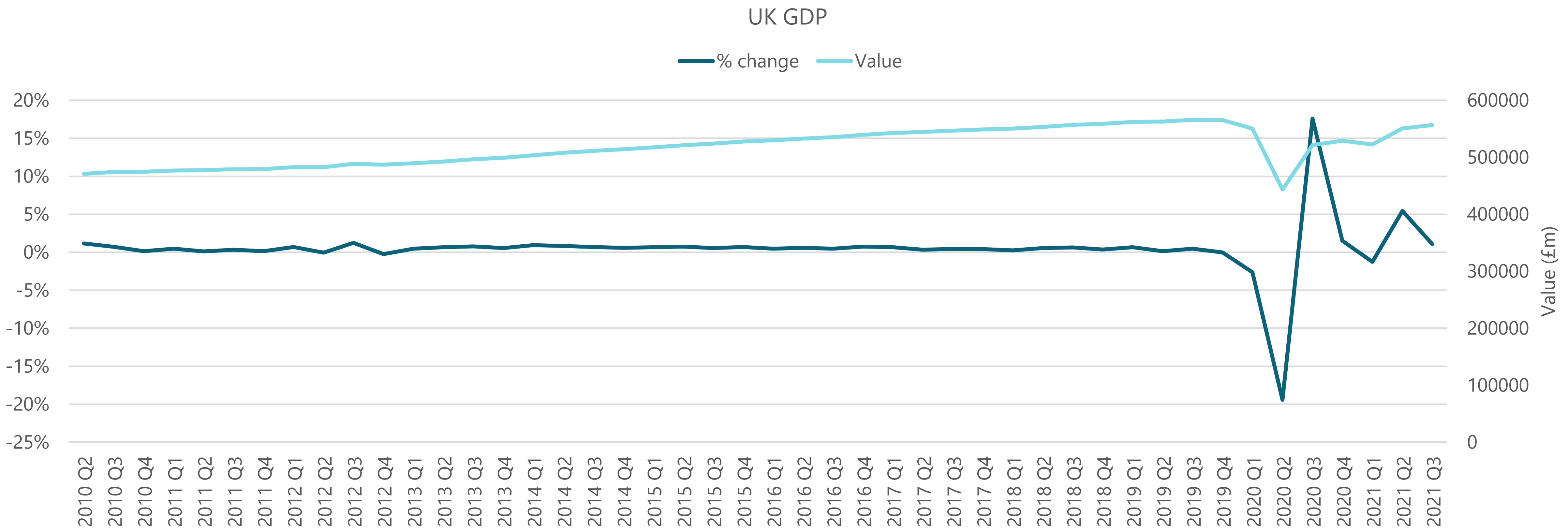
Economic impact



Data taken from the Office of National Statistics:
http://www.ons.gov.uk/

With covid and the impacts of Brexit, consumer confidence declined in 2020 but is improving slowly in 2021. The cost of living crisis in early 2022 could play a major factor in participation next year.

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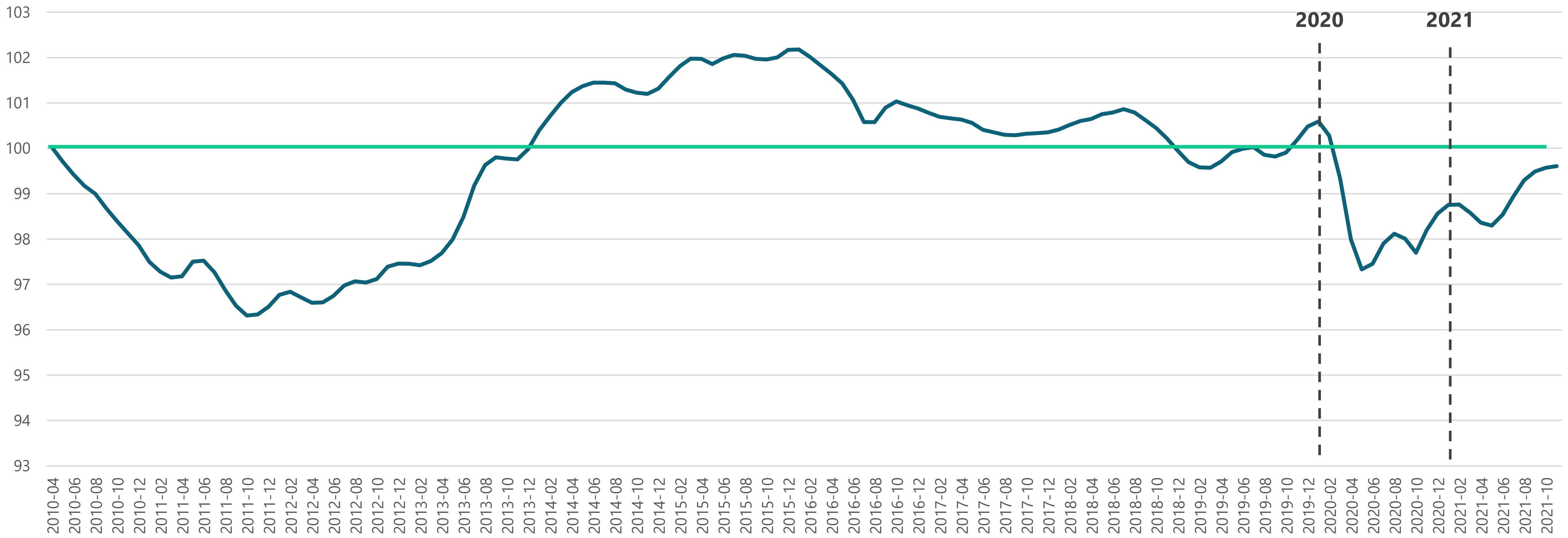
Consumer Confidence Index



Data taken from the Organisation for Economic Cooperation and Development
https://data.oecd.org/leadind/consumer-confidence-index-cci.htm

Presenter: Name

PARTICIPATION

UK and Overseas Participation

Covid has had the biggest impact on UK and overseas participation in the past couple of years.

The 2020 survey included 6 months of potential international travel before restrictions were imposed, so it is not surprising to see a higher proportion of overseas participation compared to 2021, when UK residents were more restricted in which overseas destinations they could travel to.

Naturally, UK participation is the dominant location for all activities.

Traditionally, activities like sub-aqua diving and using personal watercraft have had high proportions of overseas participation, as these are likely to be done on holiday but the covid impact means that these proportions have reduced significantly.

All activities are more likely to have been done in the UK than abroad

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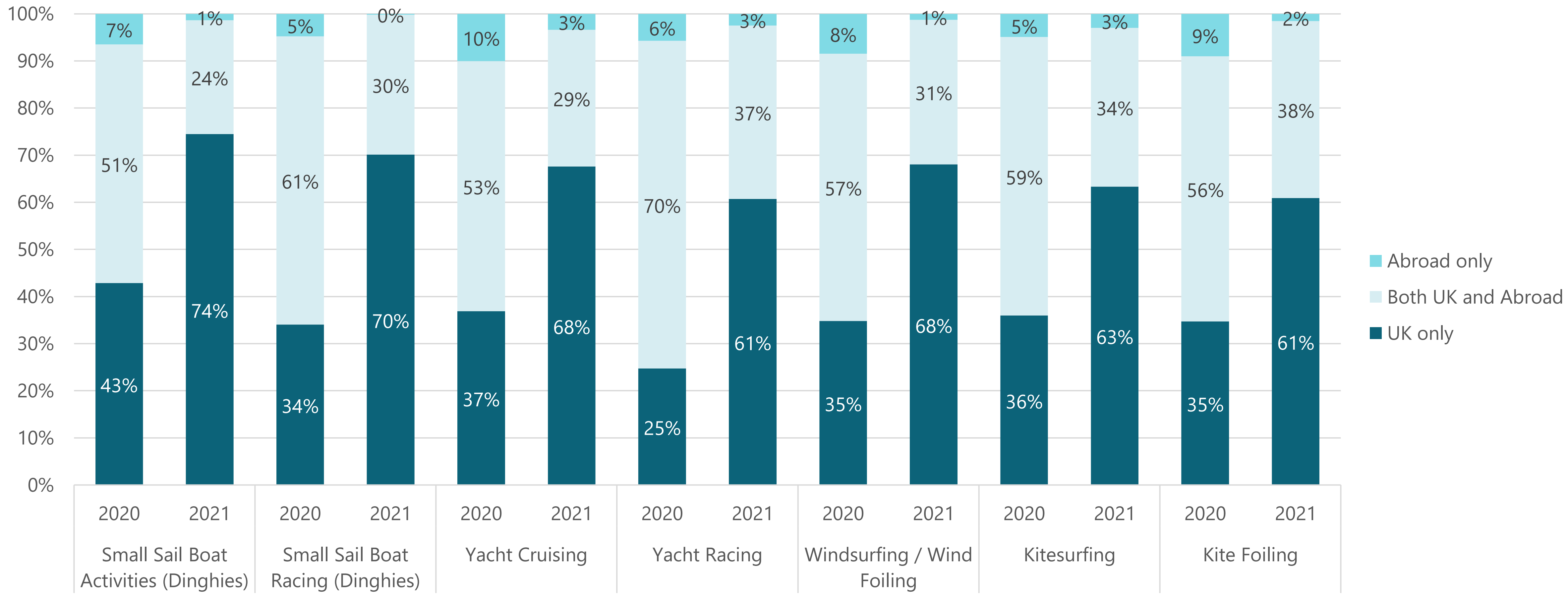
Proportion of sailing participants who participated in the UK or abroad



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

All activities are more likely to have been done in the UK than abroad

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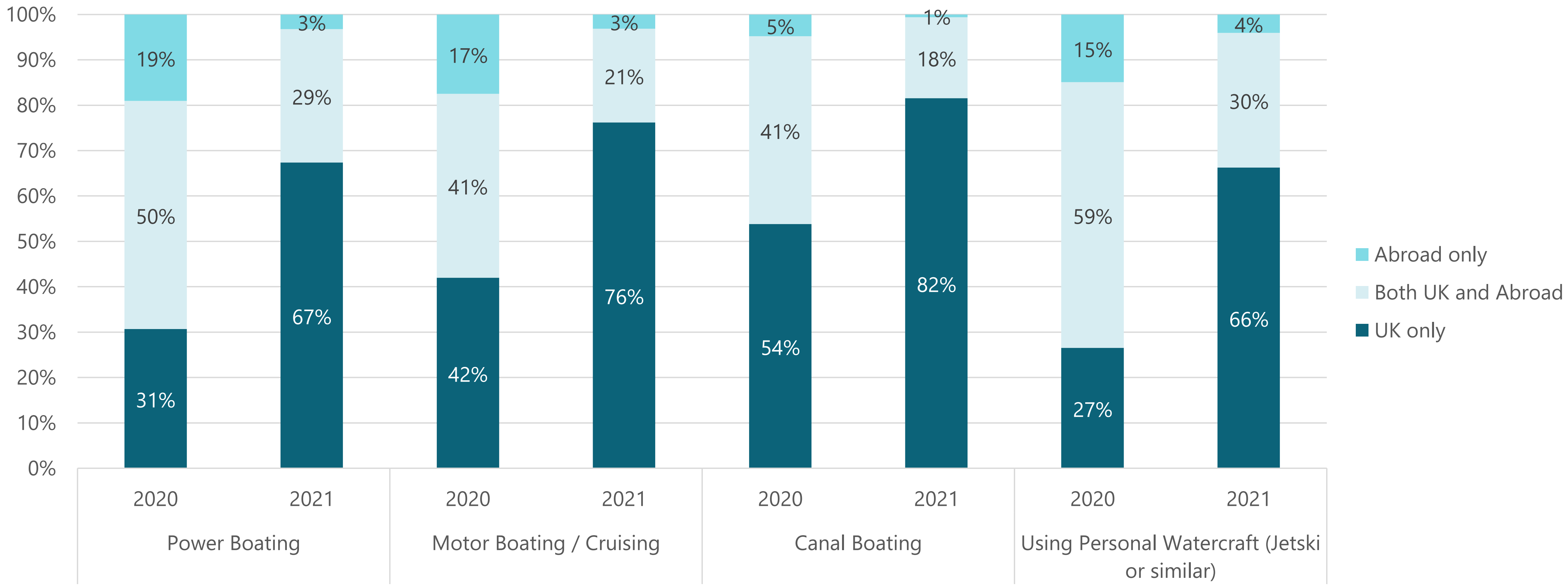
Proportion of powered participants who participated in the UK or abroad



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

All activities are more likely to have been done in the UK than abroad

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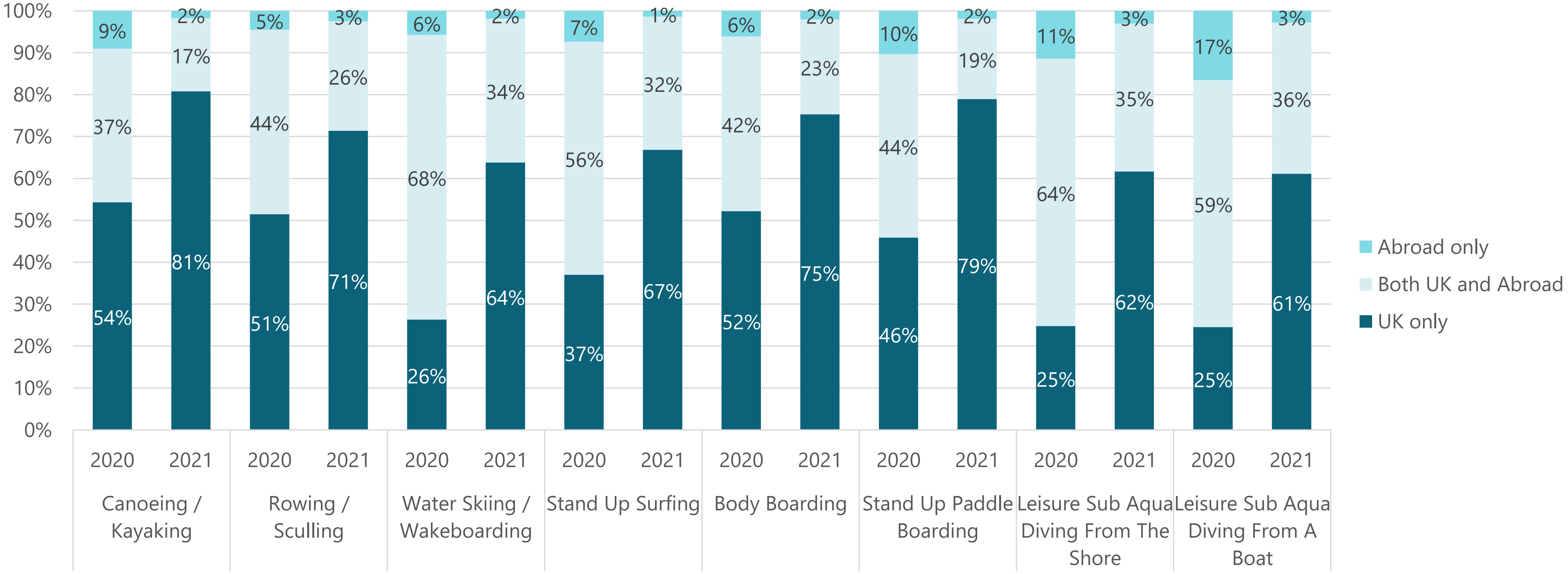
Proportion of manual participants who participated in the UK or abroad



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 activities are more likely to have been done in the UK than abroad

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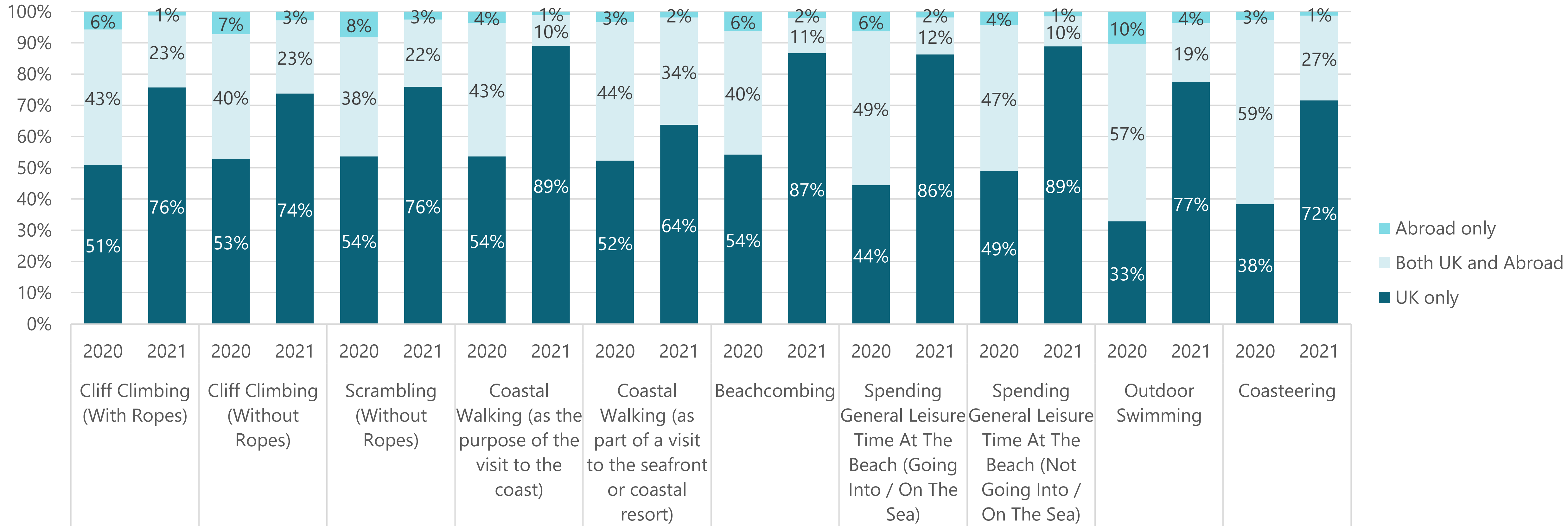
Proportion of coastal participants who participated in the UK or abroad



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

Coastal activities, which generally require little or no specialist training or equipment, are done the most frequently. The trend in 2021 is that more infrequent participants have taken part.

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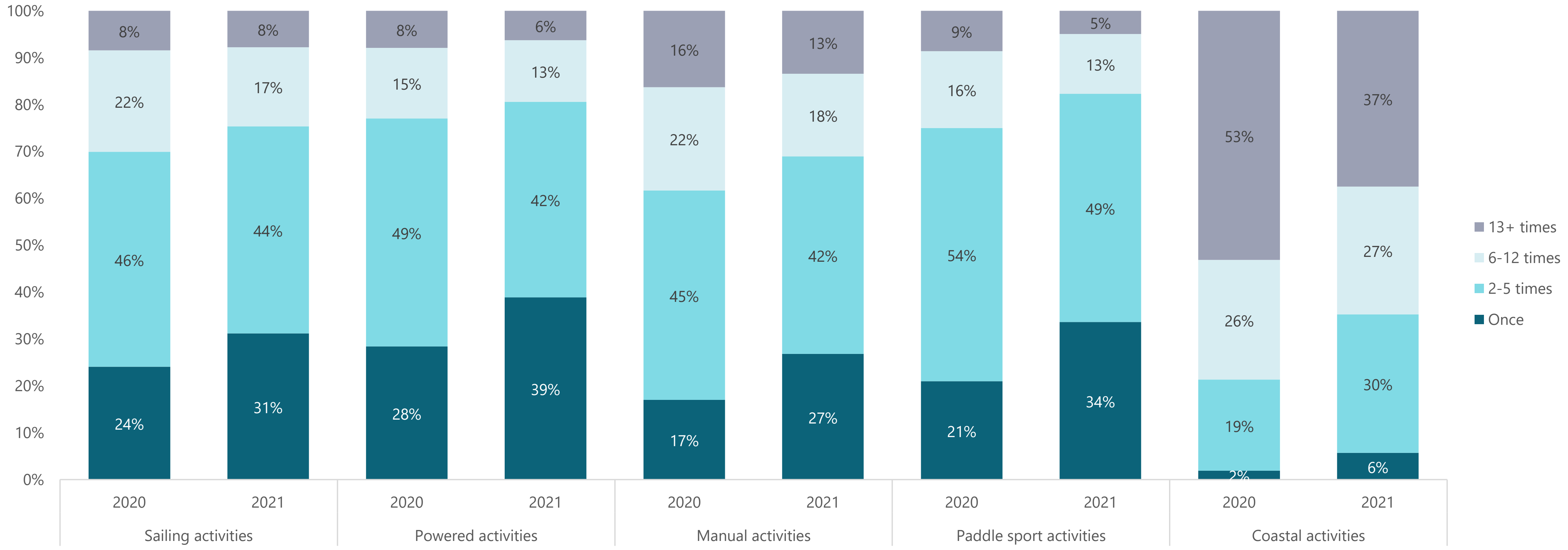
Frequency of participation



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

Sailing sports are showing a higher proportion of casual participants compared to last year

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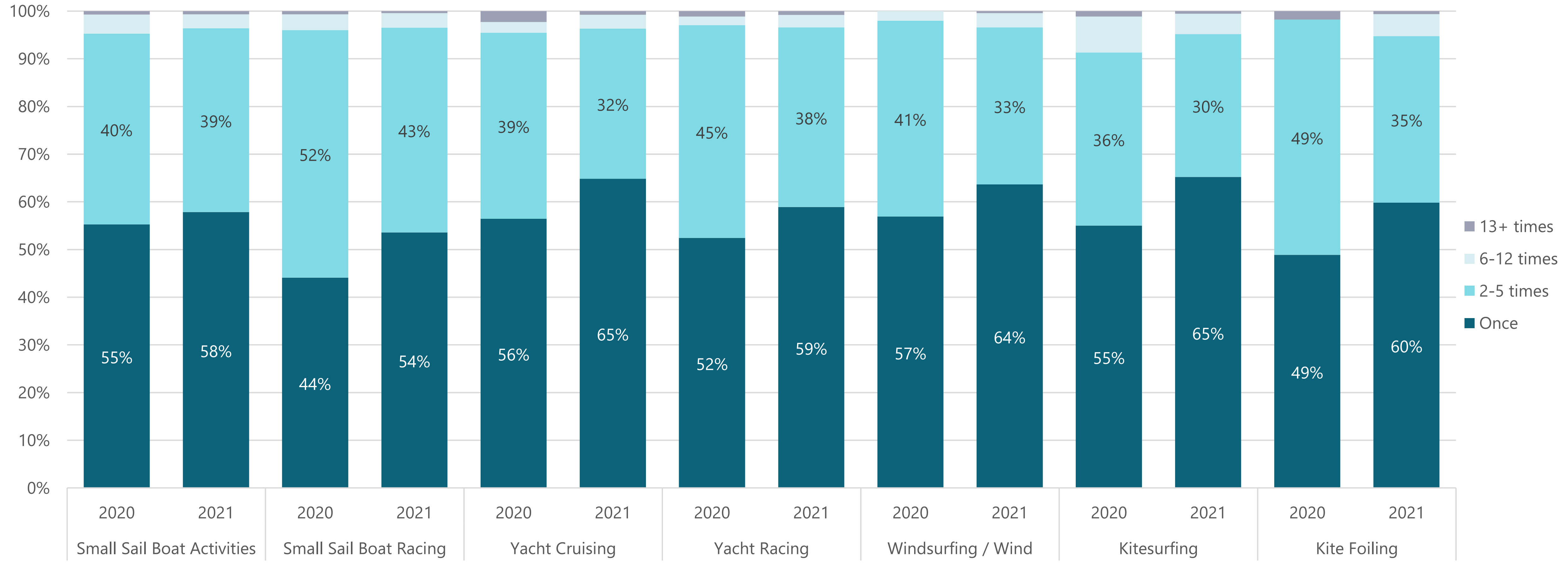
Frequency of participation (Sailing)



Question: How many times have you done each of the following **in the UK** in the last 12 months?
Base: All who have done activity in past year in the UK, sizes vary
Weighting: Demographic

Powered sports are most likely to have participants doing the activity once in the past 12 months. Again, the trend is moving to more casual participation.

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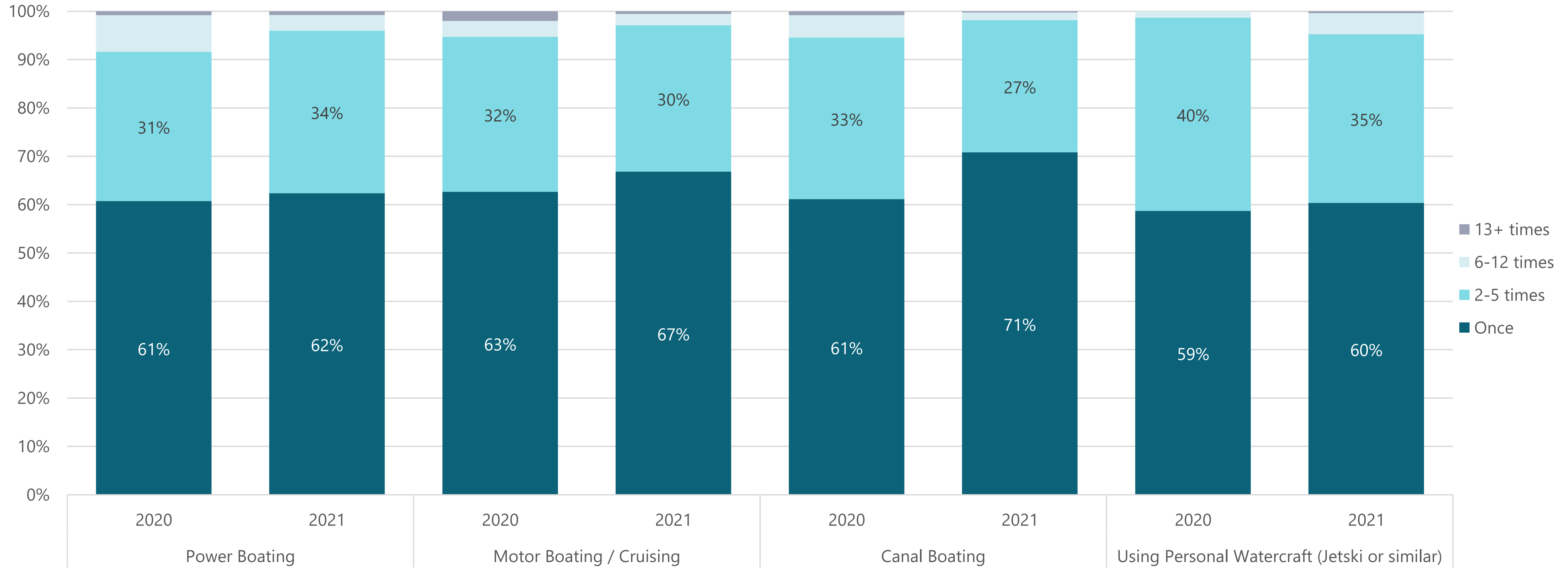
Frequency of participation (Powered)



Question: How many times have you done each of the following **in the UK** in the last 12 months?
Base: All who have done activity in past year in the UK, sizes vary
Weighting: Demographic

Manual sports have moved more casual but SUP enthusiasts (6+ times per year) have maintained the same proportion in 2021 as in 2020.

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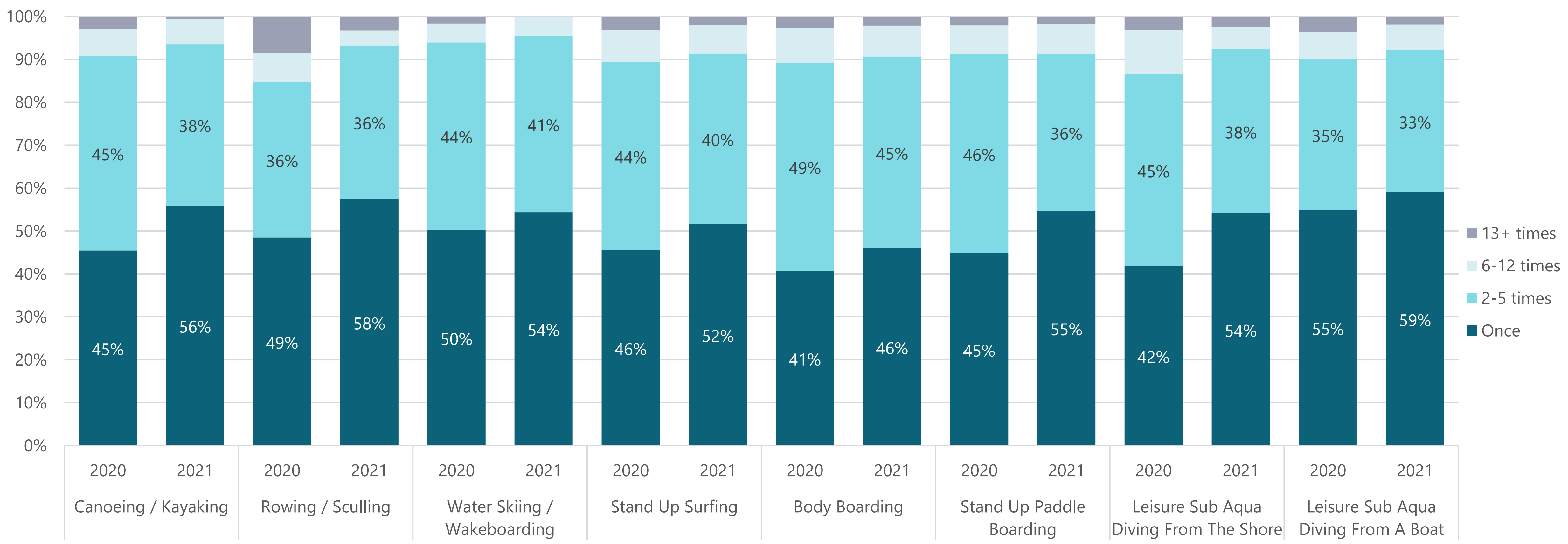
Frequency of participation (Manual)



Question: How many times have you done each of the following **in the UK** in the last 12 months?
Base: All who have done activity in past year in the UK, sizes vary
Weighting: Demographic

Coastal activities are also becoming more casual. This could be linked to the poorer weather compared to 2020 or the novelty wearing off from high participation in 2020.

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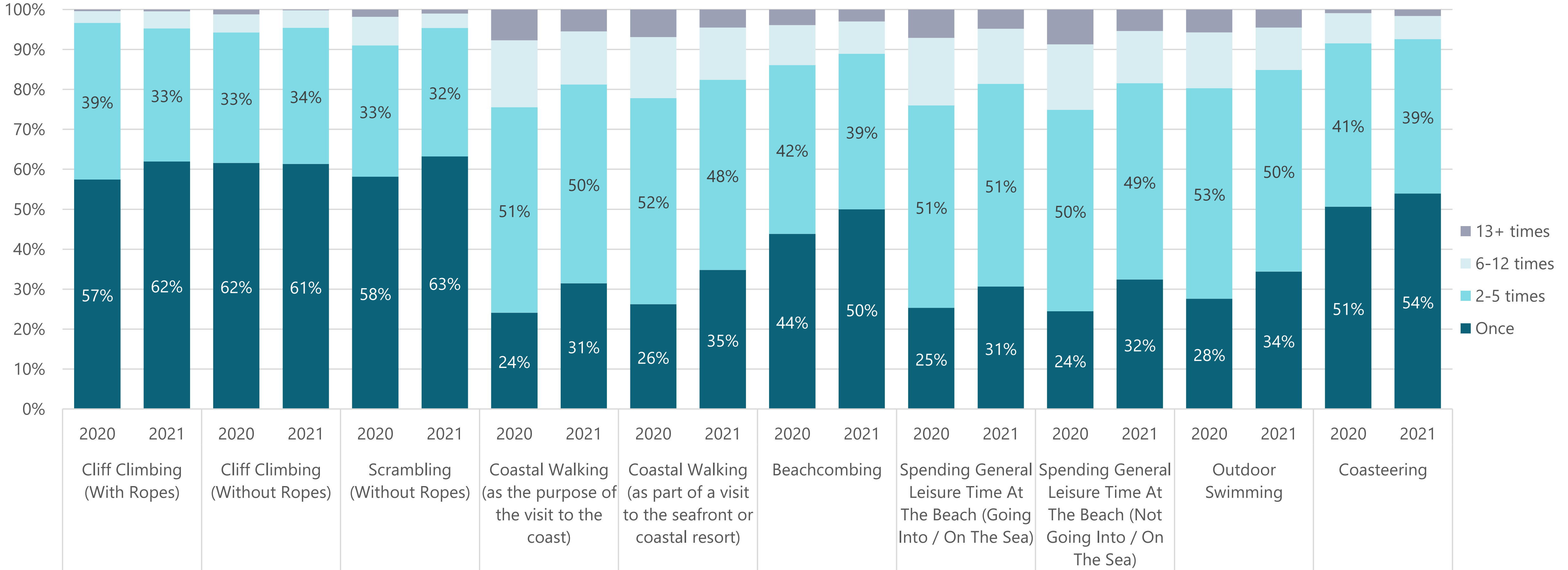
Frequency of participation (Coastal)



Question: How many times have you done each of the following **in the UK** in the last 12 months?
Base: All who have done activity in past year in the UK, sizes vary
Weighting: Demographic

The most active are the younger age group but still just over 60% of their activity is less than 5 times per year. The over 55s are the most infrequent participants.

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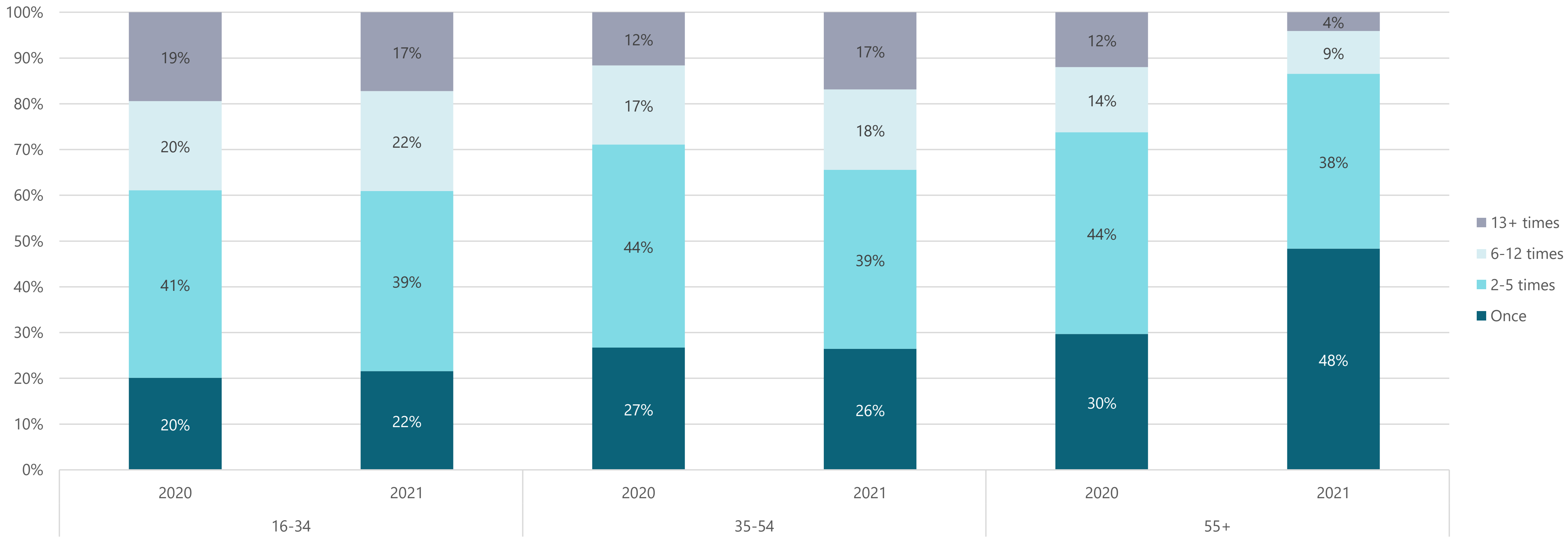
Frequency by age



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

Males are more likely than females to take part in all categories of watersport. They make up an even number of participants in coastal activities.

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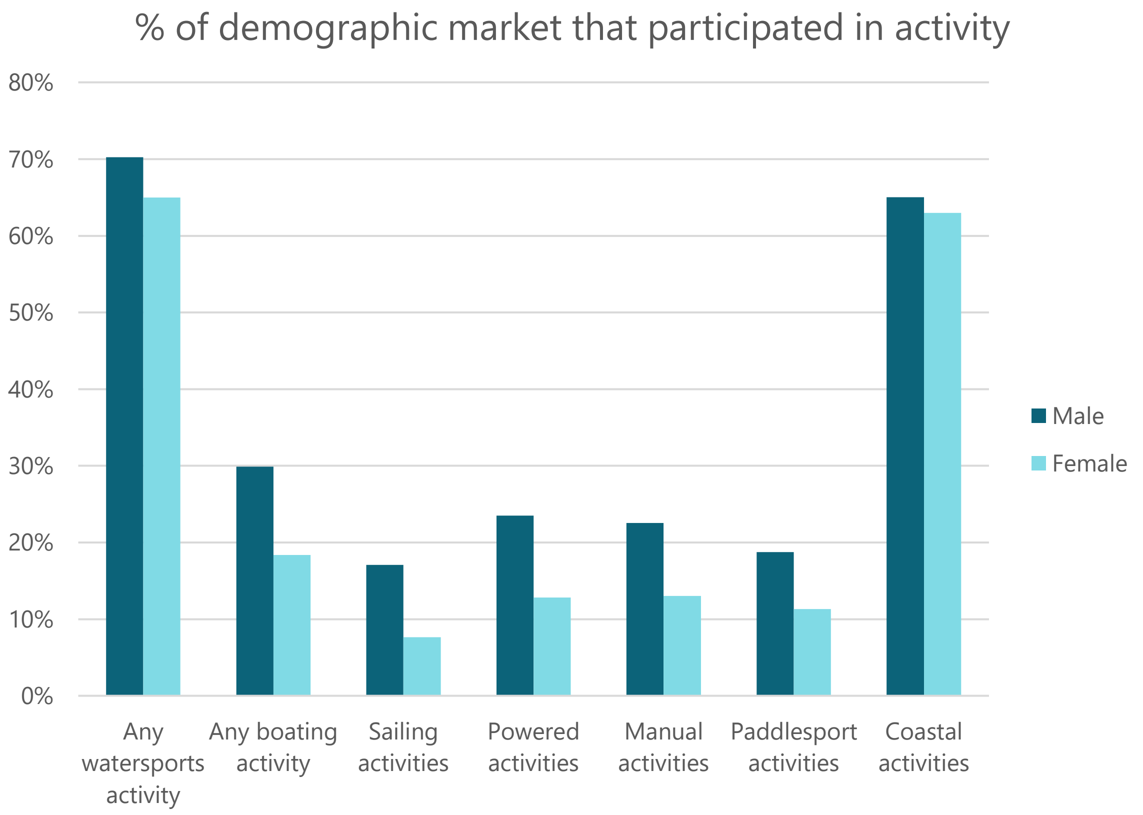
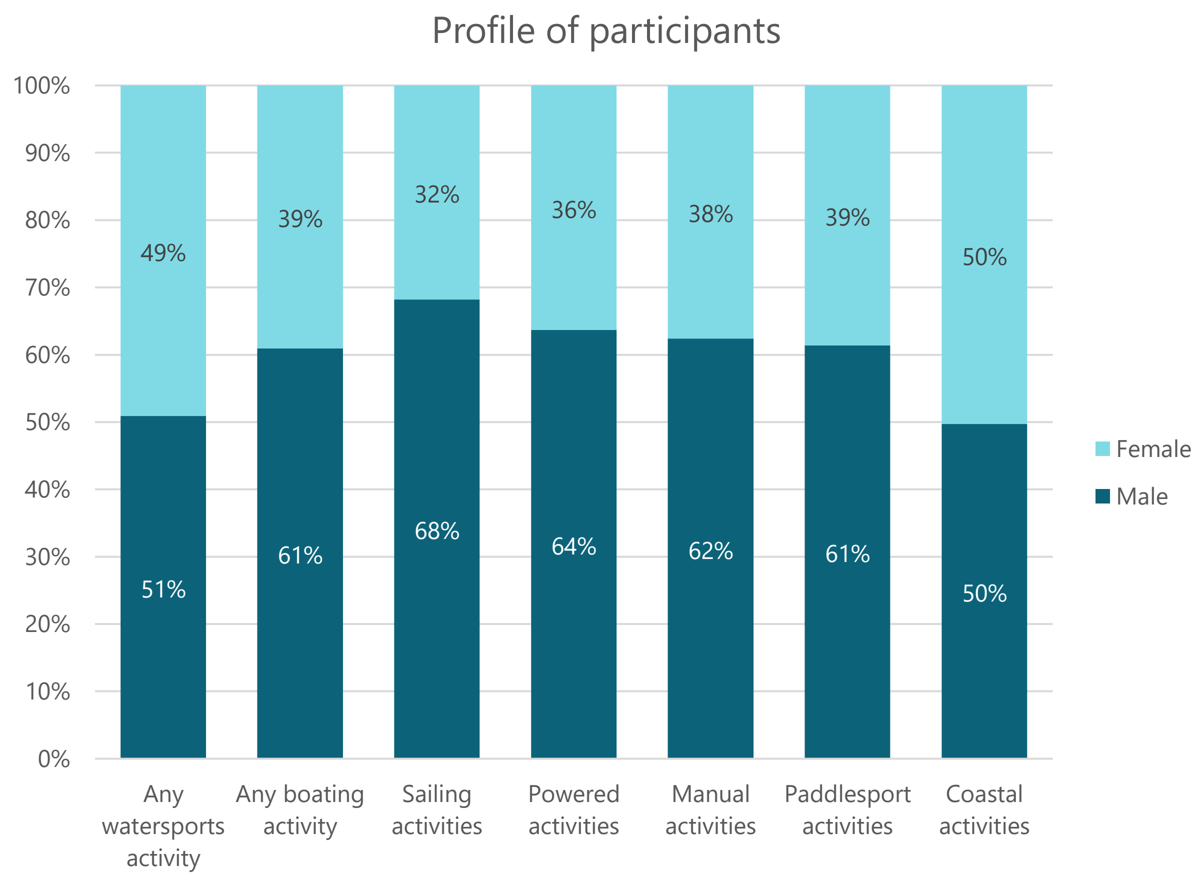
Proportion of each gender group participating and gender profile of participants





Question: Which of these activities you have taken part in within the **past year**?
Base: all respondents (12,010)
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.

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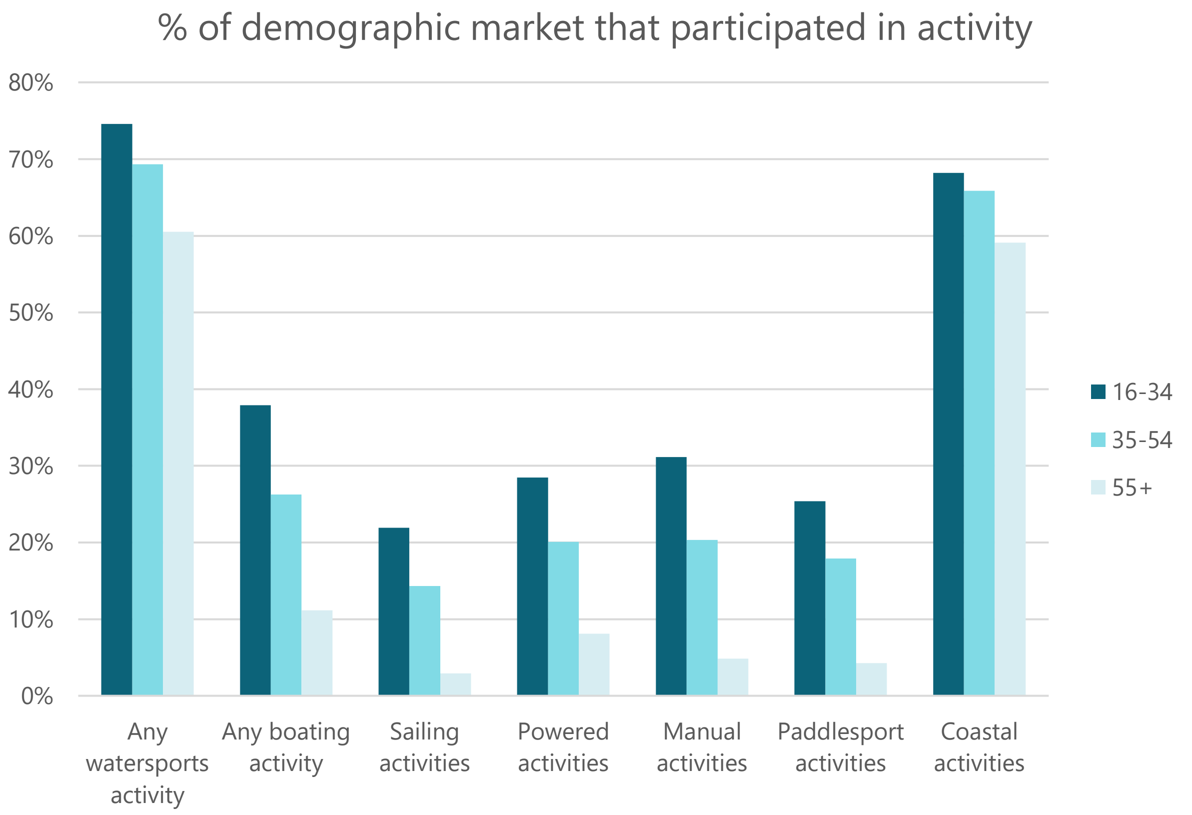
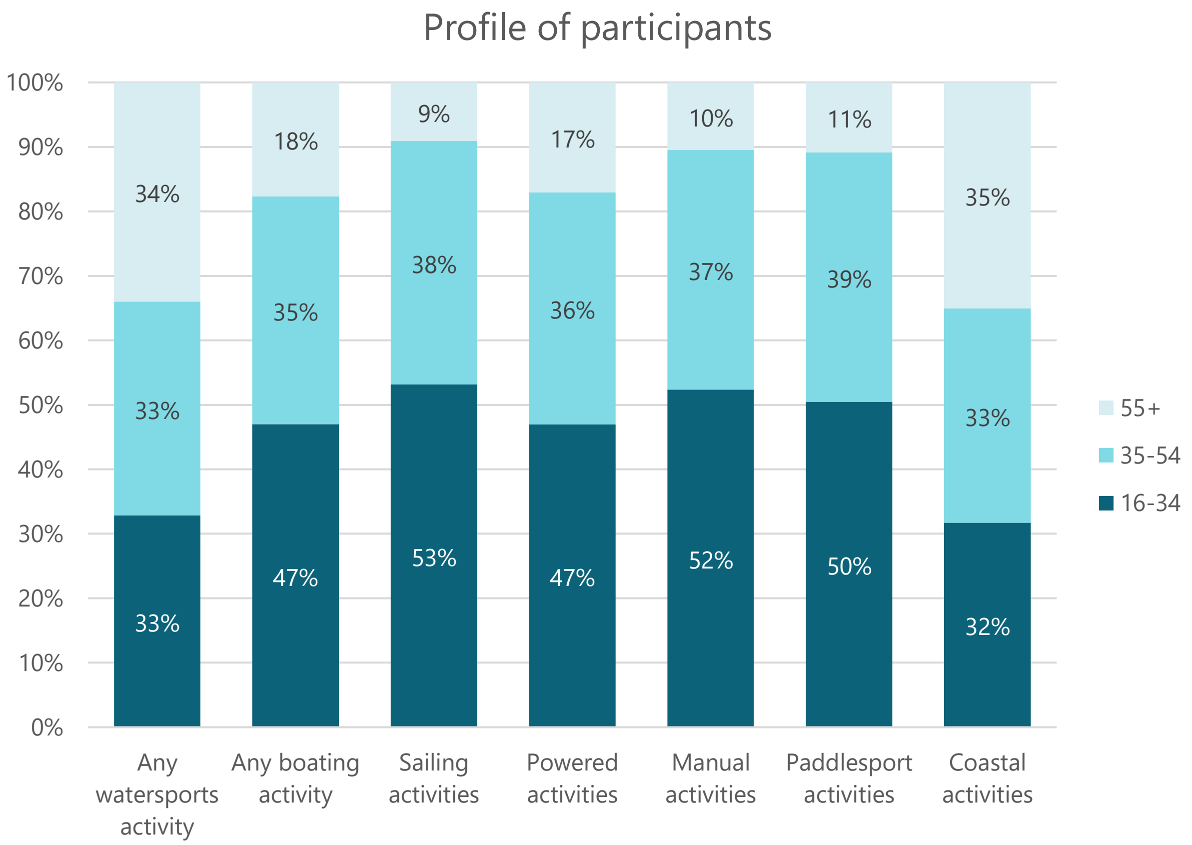
Proportion of each age group participating and age profile of participants

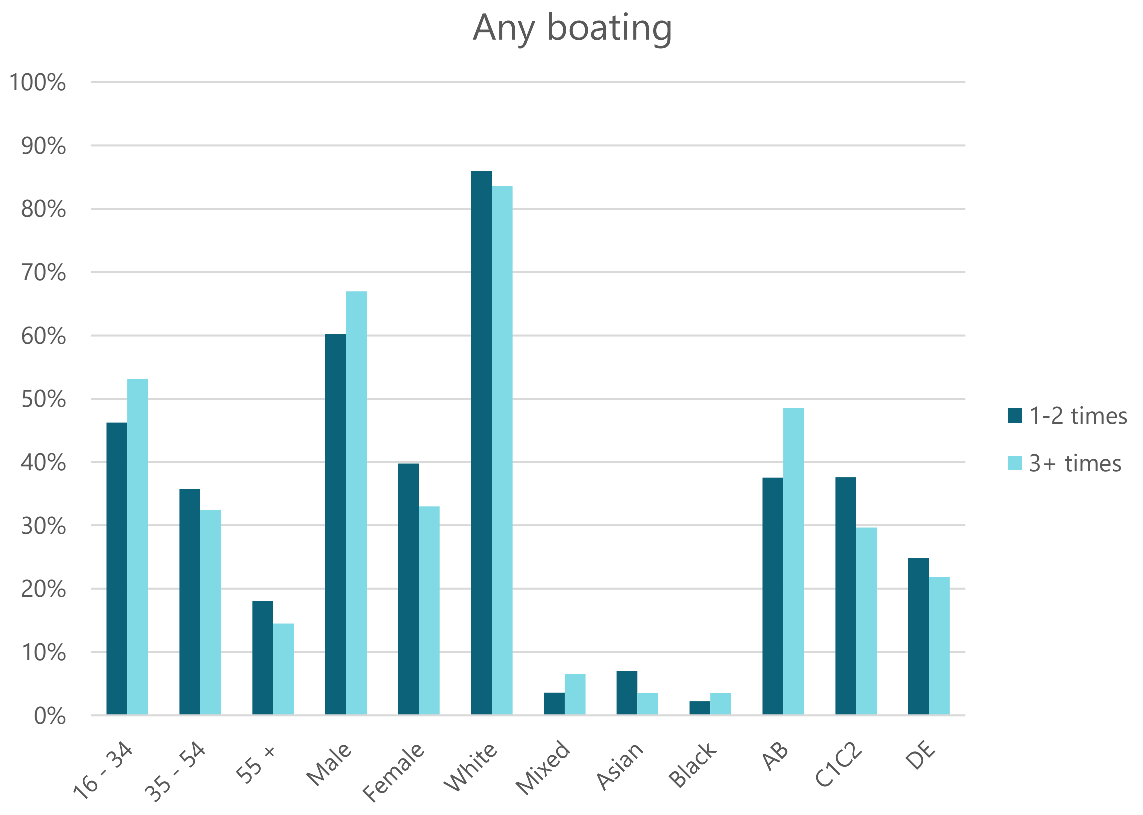


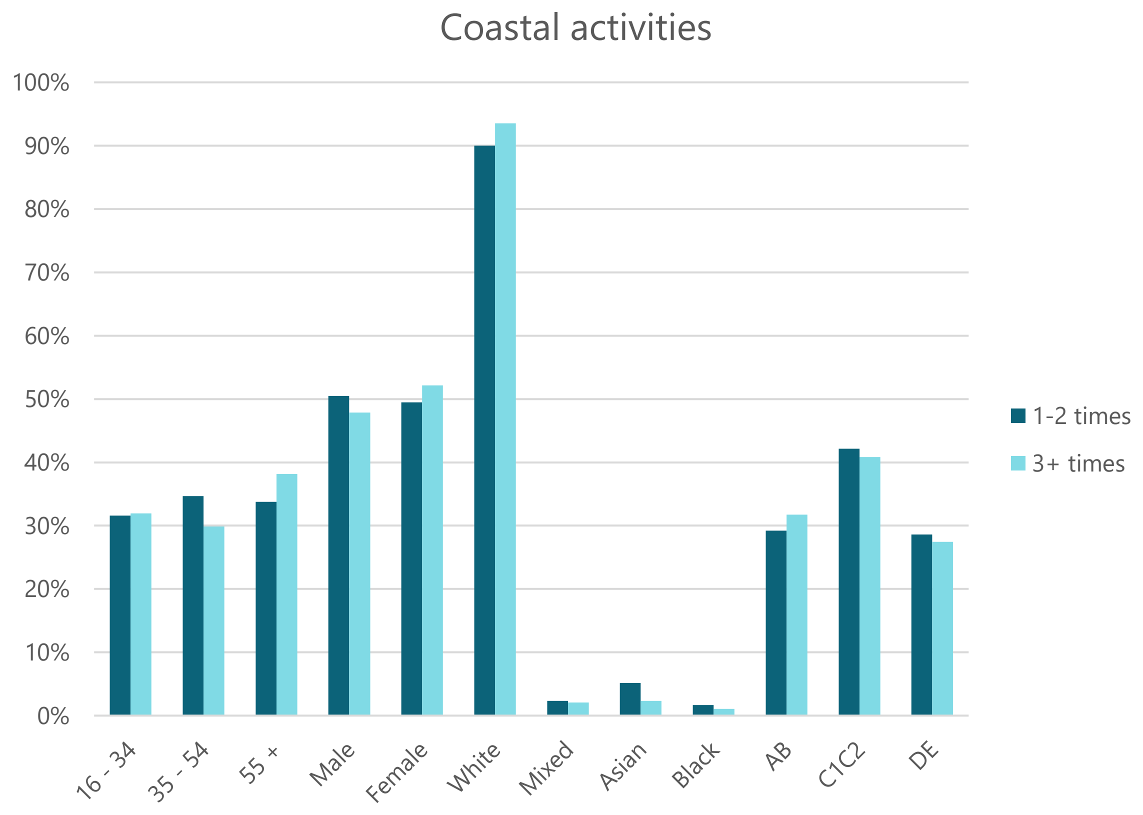


Question: Which of these activities you have taken part in within the **past year**?
Base: all respondents (12,010)
Weighting: Demographic

For more physical activities, the pattern is that younger males are more likely to be the frequent participants, and those in the AB socio-economic group. For coastal activities, the older age group make up more of the frequent participants compared to younger ages.

Profile of participants by frequency of participation





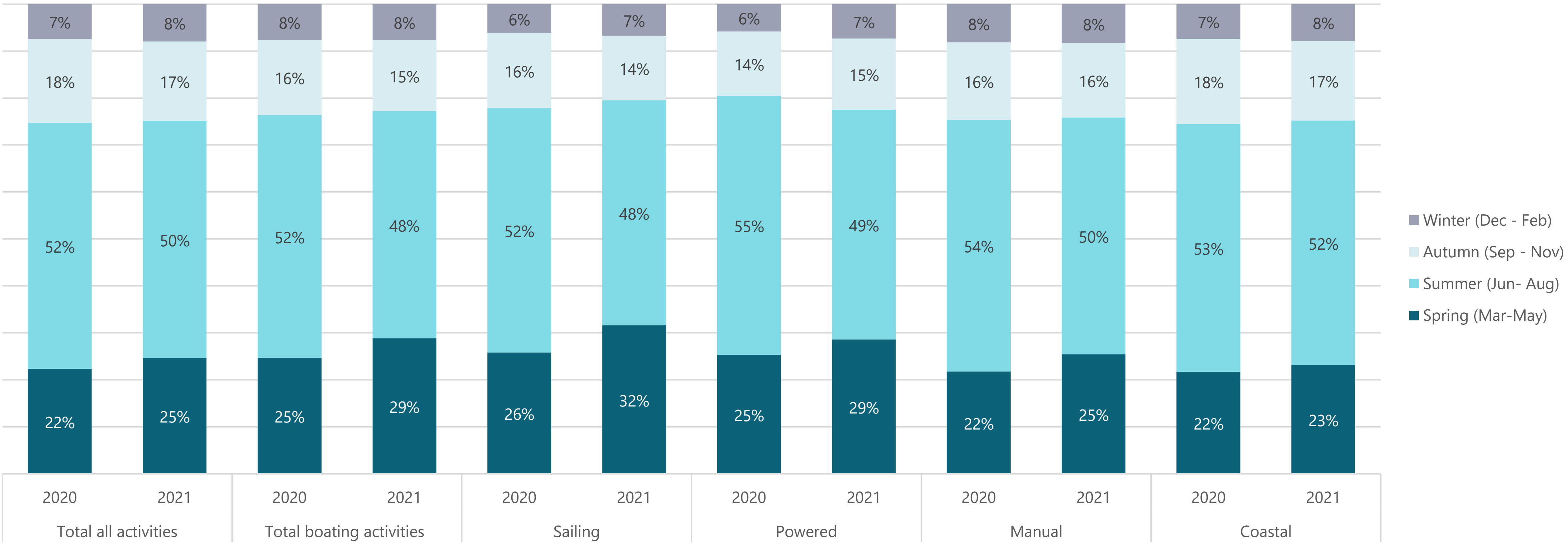
Question: Which of these activities you have taken part in within the **past year**?
Base: all respondents (12,010)
Weighting: Demographic

Presenters Name

SEASONALITY

Spring saw a slightly higher proportion of activity at the expense of summer activity but these two seasons account for the vast majority of all activity.

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

Presenters Name

BOAT OWNERSHIP

Households with surfboards, are most likely to have multiple, followed by paddleboards and canoes/ kayaks. These smaller, cheaper crafts are also the most likely to be owned overall

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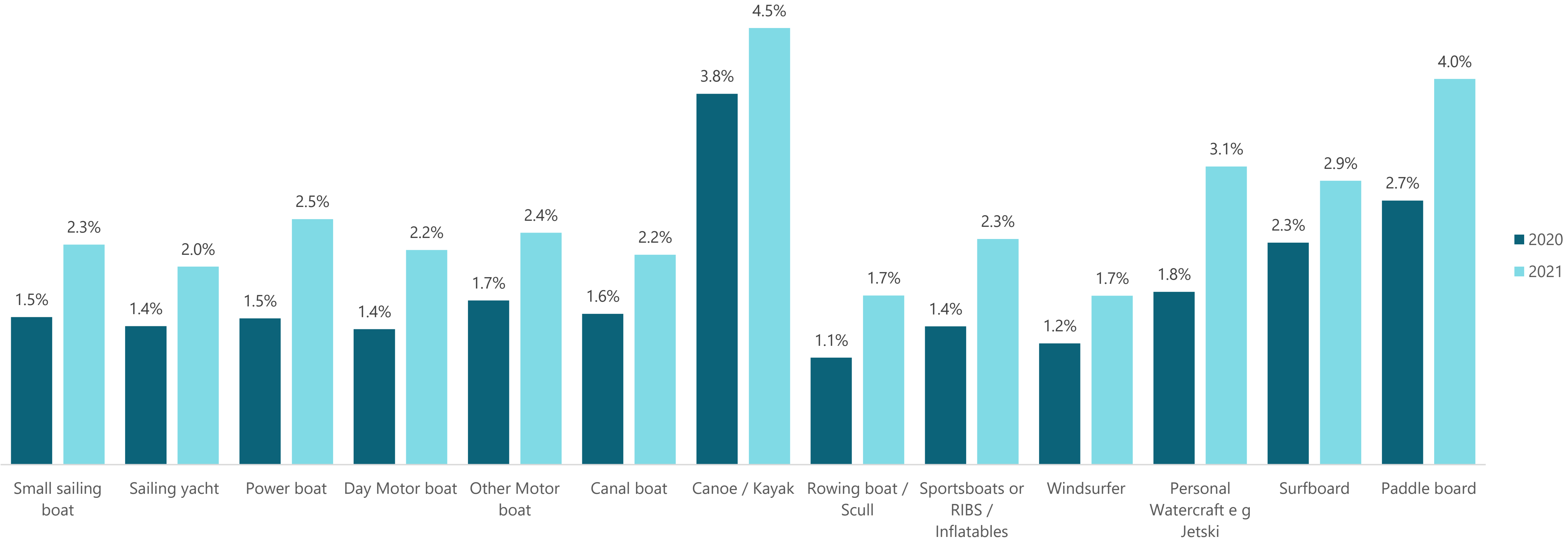
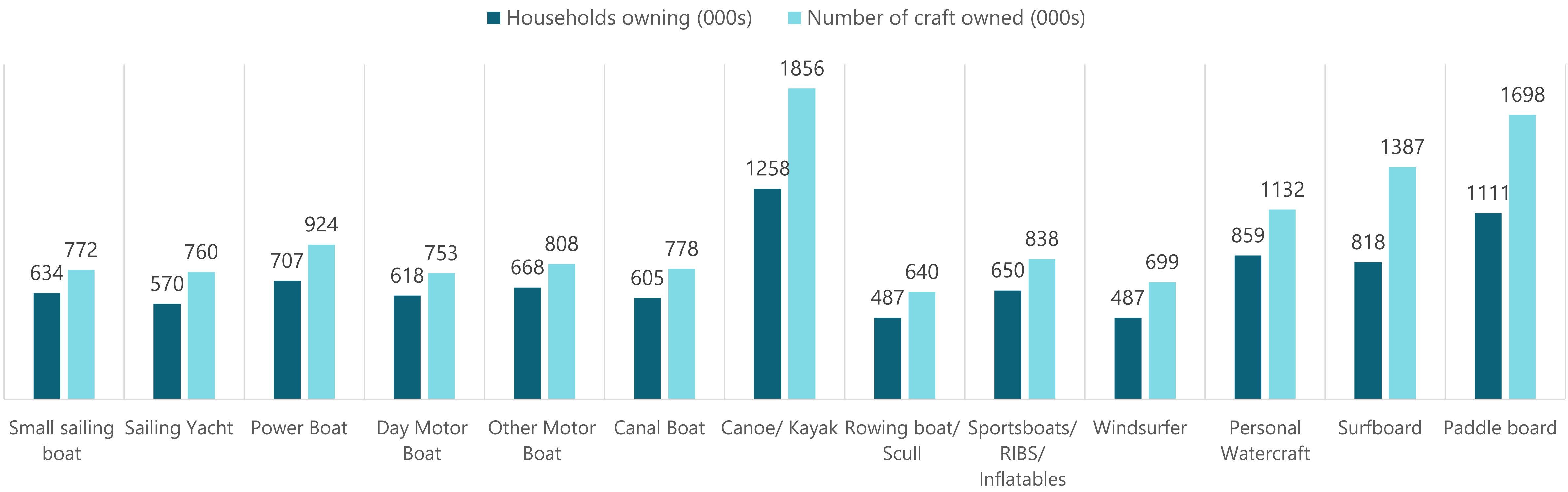
Boat ownership



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 (12,010)
Weighting: Demographic

All categories of craft have increased due to the higher proportion of people stating their household owns a craft and the higher volume of households compared to last year

Boat ownership (based on 28m households 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?
Base: all respondents (12,010)

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 power boats or surfboards

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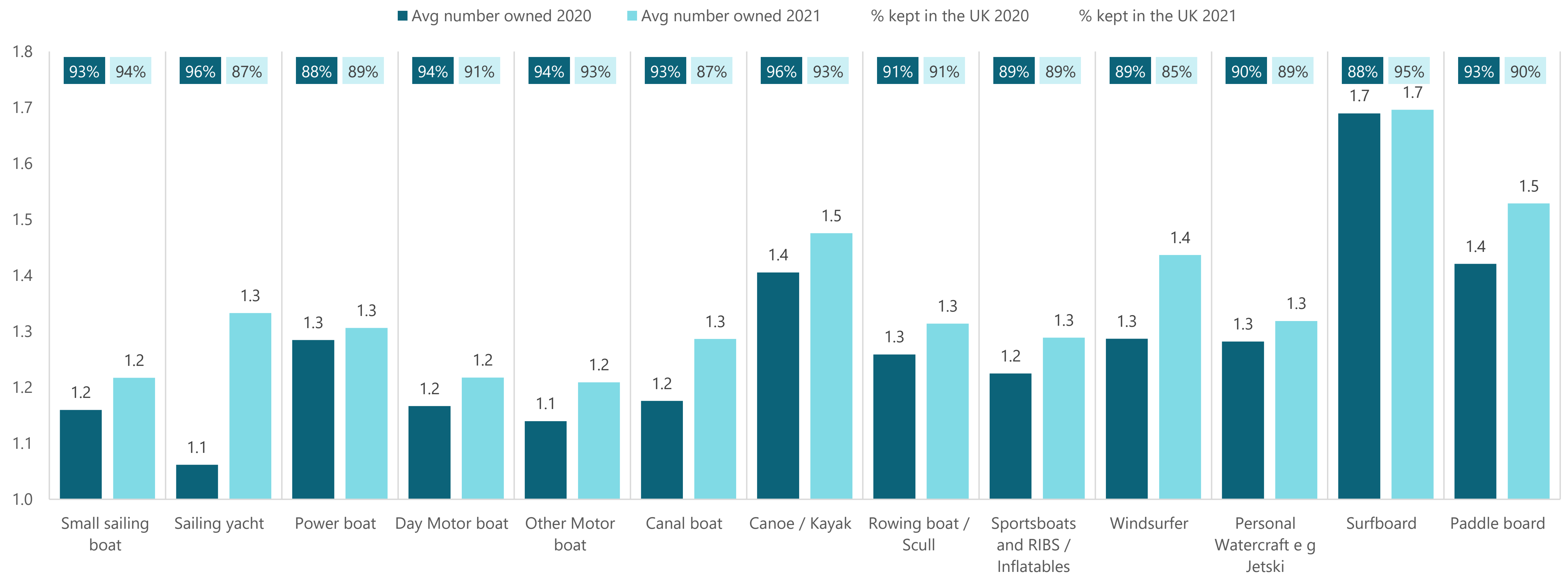
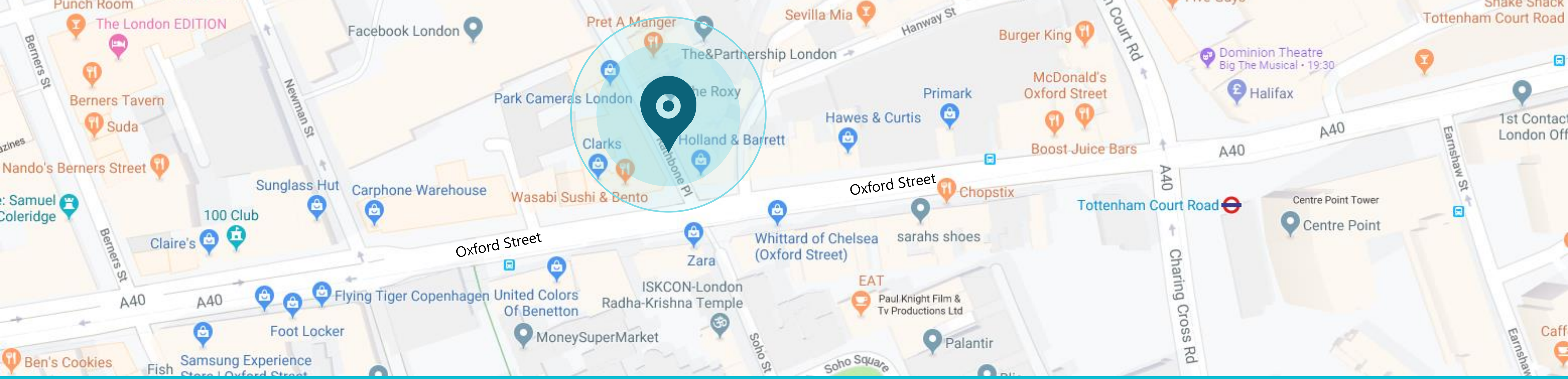
Boat ownership and kept in the UK



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 (12,010)
Weighting: Demographic



The Nursery Research and Planning Ltd

1st floor
3 – 5 Rathbone Place
London W1T 1HJ

Nearest tube: Tottenham Court Road

tel. +44 (0)20 7734 1166 | fax. +44 (0) 20 7434 1533 | hello@the-nursery.net