

Watersports Participation 2004



Foreword

by David Brooks, Sunsail

This is the 3rd year that we have undertaken research into the participation of watersports. Unlike much research that we all use, this survey is created specifically for the marine industry and gives us insight into the critical factor - what is happening to participation - the life blood of our industry. It is also broken down to levels, which aim to truly help every company that uses it - what activity people are participating in, where, when and how often.

So what's new this year - well with 3 years of data rather than just showing the raw facts we have been able to augment the survey with trend analysis. So not only can we say what happened in 2004, we can say which direction the trend is going. Some clearly good, others more concerning.

Whatever part of our industry you are in I hope you find this research useful and most importantly that you continue to play your part in encouraging people to get out on the water.

1. Understanding the Tables

The purpose of this survey is to provide robust estimates of the level of participation in a range of Watersports. A baseline survey was conducted in 2002. With the 2004 results we will now be able to give an insight into the trends by sport over 3 years.

The data on which the analysis has been based comes from a nationally representative sample of almost 6000 respondents across England, Scotland and Wales. The sample was designed to reflect the socio-economic make up of the British Population.

The Questions

Each respondent was asked if they had taken part in each of 12 watersports over the last 12 months (from September 2003). As far as possible the descriptions of each sport were provided in layman's terms to allow all respondents whatever their expertise to give accurate replies. Additional explanation was provided where misunderstandings were possible.

It was made clear that:

- Dinghies excluded small rubber boats used at the seaside, and were restricted to boats that are brought ashore after use.
- Yachts, unlike dinghies could be left in the water after use.
- 'Power boats' were defined as small craft that plane over the water, whereas 'general motor boats' go through the water.

For those activities which respondents had taken part in the last 12 months, they were asked how often they had taken part over the last year. The question was split into two parts covering participation in the UK and participation that took place abroad. The questions used in the survey are attached as an appendix to the report.

The Data

The data provided in this summary report covers all adults (those over 16). A brief explanation on the interpretation of each of the tables is given below. The omnibus survey on which the 3 questions are placed is carried out in England, Scotland and Wales, it does not include Northern Ireland. In each section we provide notes on the tables explaining any assumptions made and how the data should be interpreted.

2. 2004 Water Sports Participation

2004 Participation Rates

The first column of Table 1 overleaf titled '% for 2004' is our best estimate of participation rates for each sport in 2004. The figure 8.10% is the most likely actual level of participation in the country as measured by the survey. However, any estimate based on a sample of the population may be slightly inaccurate.

The four percentages to the right give an indication of our lower and upper estimates of participation within different levels of confidence. So for example, we are 90% confident that the overall participation rate lies between 7.52% and 8.68%

2004 Participation Numbers

In the next columns the reported rates of participation are converted into an estimate of the likely numbers of participants in each sport. This year the estimates of numbers of participants are based on the 'Marketing Pocket Book 2004'¹. There is a rise of almost 2 million on the national population estimate that was given in the 2003 report.

Changes in the absolute numbers participating in each sport are partly caused by changes in the participation rates and partly from a change in the estimate of the total population. The rise in overall population will increase our estimates of the numbers participating in each sport. Therefore this needs to be taken into account when comparing absolute numbers of participants in 2003 and 2004 to avoid misleading comparisons of the absolute figures in 2003.

Interpreting Trends

The 2004 data shows a growth in participation rates over 2003. Our 'best estimate' in 2004 is close to the 2002 participation levels suggesting that the possible loss in participation implied by last year's figures has been recovered this year. We cover the 3 trends in more detail later in the report.

In interpreting the figures it is important to consider if they are measuring a real change in participation or a random fluctuation in the data. So for example in 2003 we estimated canoeing participation at 2.23%, in 2004 we have estimated it at 2.70%. A rise of 0.47 percentage points. As we are estimating the participation rate from a sample of the population small changes could be caused by random variation. As the scale of change increases the likelihood that it is caused by random variation declines and it is increasingly likely to reflect a real change.

The figures in the column 'Significance Measure' indicate whether the observed changes are real changes or caused by random fluctuation. The figures are highlighted in red if the significance measure of the change is bigger than 90%, which indicates that the change is a real change.

The rise of 0.47% in canoeing is one of the larger rises recorded for individual sports. However, it is still within the confidence limits we have set. The rise may therefore be the result of random fluctuation. We are 90% certain that the true participation in canoeing in 2004 is between 2.36% and 3.04%, the maximum estimate in 2003 was 2.54%. This

¹ Published by The Advertising Association in association with the "World Advertising Research Centre"

maximum is still below our 'best estimate of 2.70%, therefore the change may be a sample fluctuation, but statistically speaking it is likely that there has been an overall rise in participation.

Table 1- Watersports Participation in GB 2004

	Participation rate 2004					Number of participants 2004		Participation rate 2003			Number of participants 2003	
	% for 2004	Min			Max	Min 90%	Max 90%	% for 2003	Change (percentage points)	Significance Measure	Min 90%	Max 90%
		95%	90%	90%	95%	N	N				N	N
Any Watersport	8.10%	7.41%	7.52%	8.68%	8.79%	3,468,000	4,002,000	7.23%	0.87	92.43%	2,976,000	3,467,000
Canoeing	2.70%	2.29%	2.36%	3.04%	3.11%	1,086,000	1,404,000	2.23%	0.47	90.27%	853,000	1,133,000
Water skiing	1.20%	0.92%	0.97%	1.43%	1.48%	447,000	660,000	1.23%	-0.03	12.71%	444,000	653,000
Other small sail boat activities	1.30%	1.01%	1.06%	1.54%	1.59%	489,000	710,000	0.83%	0.47	98.75%	284,000	456,000
Rowing	1.40%	1.10%	1.15%	1.65%	1.70%	531,000	761,000	1.15%	0.25	78.51%	409,000	611,000
Windsurfing	1.10%	0.84%	0.88%	1.32%	1.36%	405,000	609,000	0.74%	0.36	96.16%	247,000	410,000
Using personal watercraft	1.10%	0.84%	0.88%	1.32%	1.36%	405,000	609,000	1.05%	0.05	20.26%	372,000	565,000
General motor boating	0.90%	0.66%	0.70%	1.10%	1.14%	323,000	508,000	0.92%	-0.02	8.76%	319,000	500,000
Yacht cruising	0.90%	0.66%	0.70%	1.10%	1.14%	323,000	508,000	0.72%	0.18	73.66%	239,000	399,000
Power boating	1.00%	0.75%	0.79%	1.21%	1.25%	364,000	559,000	0.87%	0.13	52.90%	300,000	477,000
Small sail boat racing	0.80%	0.57%	0.61%	0.99%	1.03%	282,000	456,000	0.78%	0.02	10.21%	264,000	430,000
Canal boating	0.70%	0.49%	0.52%	0.88%	0.91%	241,000	404,000	0.61%	0.09	47.07%	197,000	344,000
Yacht racing	0.30%	0.16%	0.18%	0.42%	0.44%	85,000	192,000	0.24%	0.06	46.52%	61,000	154,000
None	91.90%	91.21%	91.32%	92.48%	92.59%	42,113,000	42,647,000	92.77%			41,069,000	41,561,000
Base	5967					46,115,400	46,115,400	5929			44,536,529	44,536,529

Base: all respondents (5967)

Source: Watersports Omnibus Survey - 2004

Note 1: Based on GB population aged 16 and over

Note 2: Population estimates based on population 16 and over - "Marketing Pocket Book 2004"

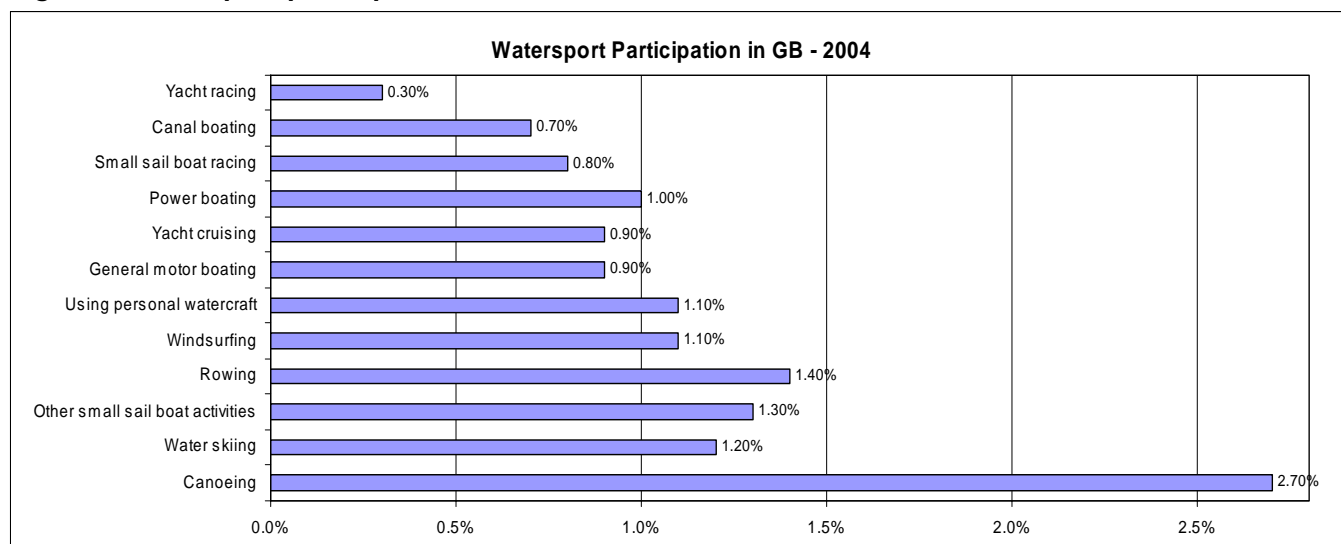
Table 2 Participation in RYA interests 2004²

	Participation rate					Number of participants 2004		Participation rate		Number of participants 2003	
	% for 2004	Min			Max	Min 90%	Max 90%	% for 2003	Change (percentage points)	Min 90%	Max 90%
		95%	90%	90%	95%	N	N			N	N
RYA sport	5.10%	4.54%	4.63%	5.57%	5.66%	2,136,000	2,567,000	5.10%	0.00	2,136,000	2,568,000
Base	5967					46,115,400	46,115,400	6063		44,536,529	44,536,529

Base: all respondents (5967)

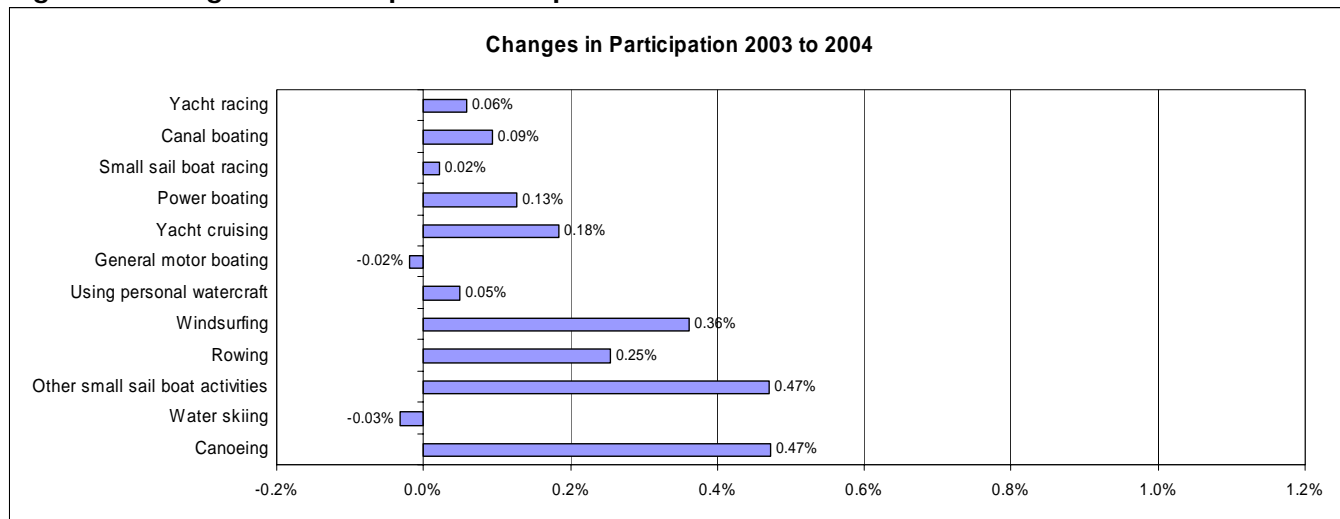
Source: Watersports Omnibus Survey – 2004

Figure 1 Watersport participation in GB in 2004



² The number for this table in the 2003 report was Table 1b

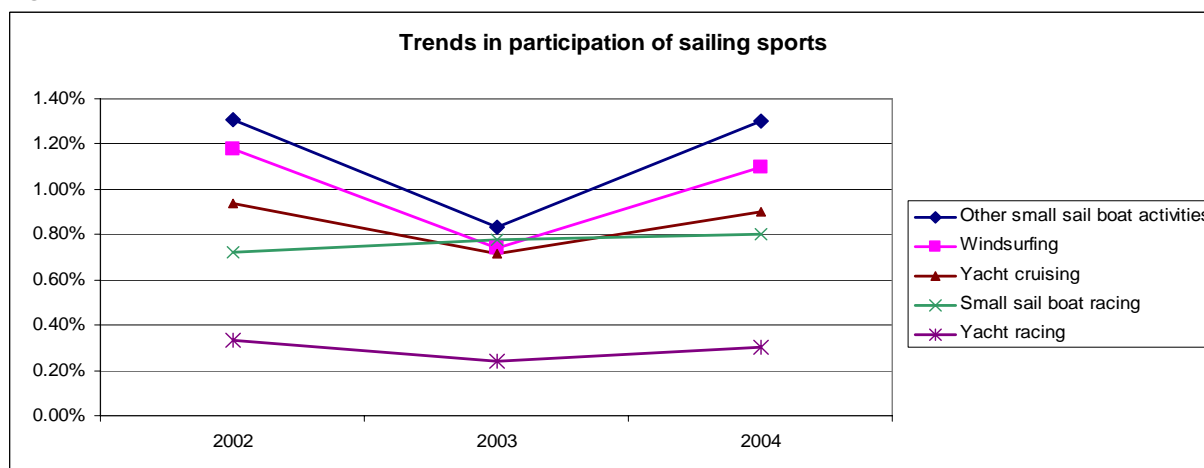
Figure 2- Changes in Watersports Participation in GB 2003 to 2004

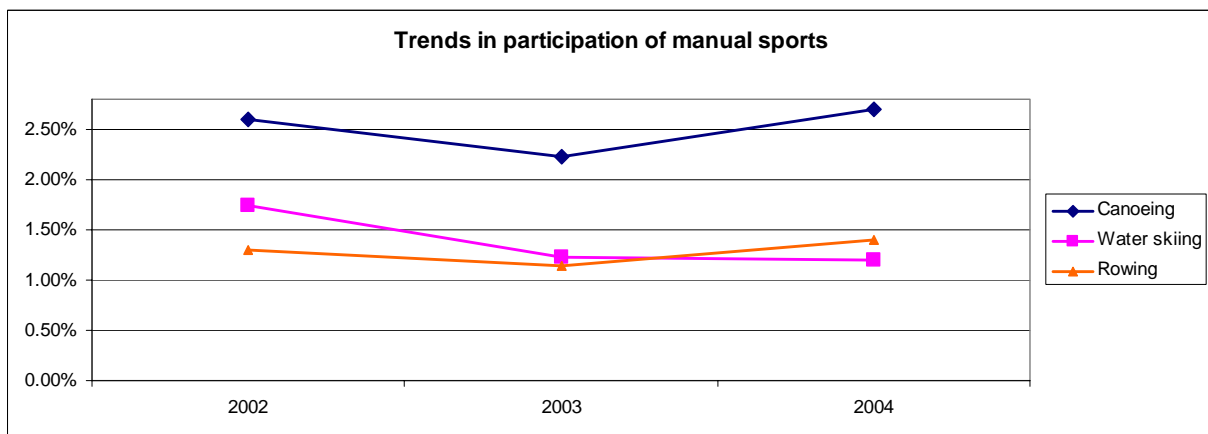
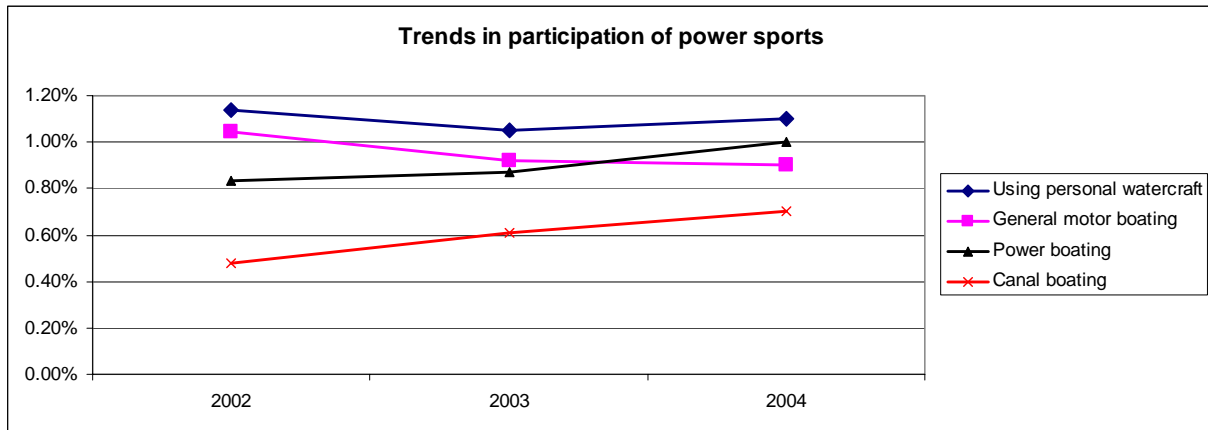


Emerging trends

The following charts give an insight in the participation trends in various sports from 2002 to 2004. The sports are grouped together into sailing sports (small sail boat racing, other small sail boat activities, yacht racing, yacht cruising and windsurfing), power sports (power boating, general motor boating, canal boating and using personal watercraft) and manual sports (canoeing, rowing and water-skiing). It appears that while most power sports have seen more stable participation levels and some general rises in participation, sailing sports were more significantly affected by the 2003 reductions implied with the non-racing sports showing the greatest fluctuations. It is too early to be certain of any long term trends.

Figure 3- Trends in Watersports Participation in GB 2002 to 2004





3. Regional Participation

Table 4 provides an indication of the variations in participation by residential area of the country in 2004. ITV regions have been grouped to provide more robust sample sizes and therefore more robust estimates of participation. However, the sample sizes in each region are still small varying between 533 and 1986. This means we can provide an indication of participation rates by region, but the statistics are less reliable than the national estimates.

We have highlighted participation rates where changes are statistically significant since 2003. The darker grey (or orange in colour copies) is used to indicate apparent rises in the participation the lighter grey (or blue) to indicate an apparent decline. However, the small numbers in each region mean that the data should be treated with caution. The numbers of residents in each region are provided at the bottom of the table. The regions are defined as follows:

South East and East England	South, South East, East and London ITV regions (covered by Meridian, LWT & Carlton and Anglia)
The West	Wales, South West and West ITV regions (covered by West country, HTV and Central)
Midlands	Midlands ITV region (covered by Central)
Northern England	North West, North East and Yorkshire ITV regions (covered by Granada, Yorkshire and Tyne Tees)
Scotland	Border and Scotland ITV regions (covered by Grampian, Scottish and Border)

Table 3 Watersports participation rates by ITV regions 2004³

ITV regions 2004						
	All regions	London/ East/ South East	Wales/ West/ South West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland
Any watersport	8.1%	9.0%	10.1%	6.9%	8.0%	4.8%
Canoeing	2.7%	2.5%	2.8%	2.5%	3.2%	1.6%
Water skiing	1.2%	1.6%	1.2%	1.1%	1.0%	0.5%
Other small sail boat activities	1.3%	1.4%	2.3%	1.5%	0.9%	0.2%
Rowing	1.4%	1.5%	1.5%	1.0%	1.7%	0.2%
Windsurfing	1.1%	1.7%	0.9%	0.7%	0.8%	0.3%
Using personal watercraft	1.1%	1.4%	0.8%	0.6%	1.3%	0.1%
General motor boating	0.9%	0.7%	1.8%	0.6%	1.0%	0.6%
Yacht cruising	0.9%	1.0%	2.8%	0.6%	0.2%	1.1%
Power boating	1.0%	1.3%	1.3%	0.6%	0.9%	0.4%
Small sail boat racing	0.8%	1.1%	0.6%	0.6%	0.6%	0.8%
Canal boating	0.7%	0.9%	0.2%	0.8%	0.6%	0.4%
Yacht racing	0.3%	0.6%	0.1%	0.1%	0.1%	0.0%
None	91.9%	91.0%	89.9%	93.1%	92.0%	95.2%
Base	46,115,400	15,706,369	5,030,642	7,592,032	13,783,794	4,002,562

Base: all respondents (5967, Source Water Sports Omnibus Survey 2004)

Table 3 shows our estimate of the number of people participating in each sport by ITV region. While three regions follow the overall trend showing a rise in participation since 2003 the Midlands and Border/Scotland both show declines.

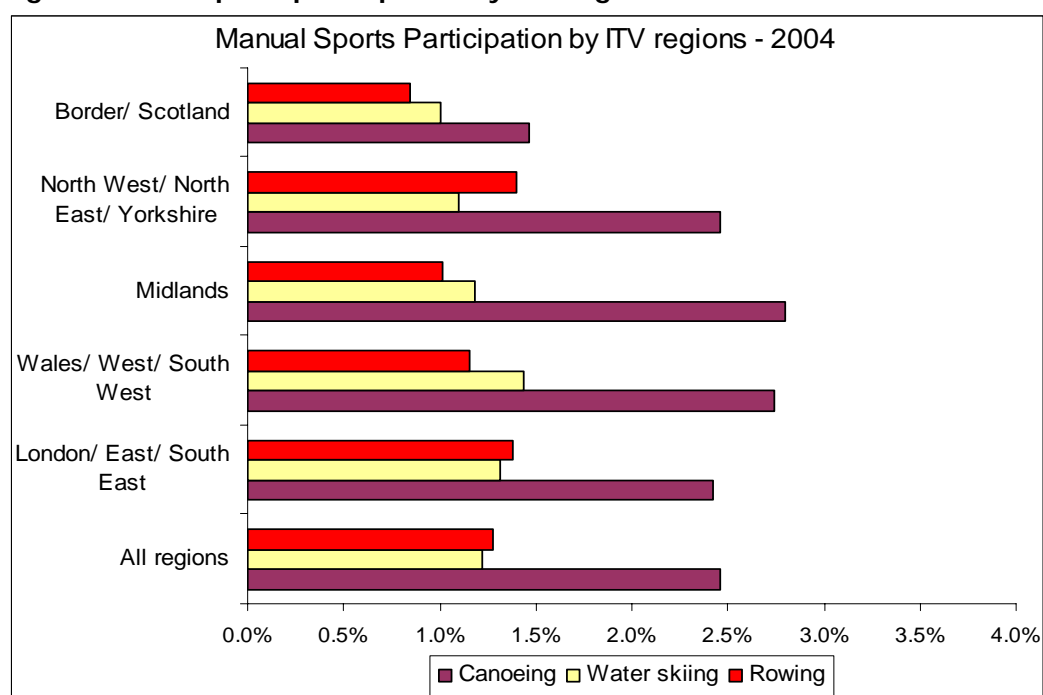
³ The number for this table in the 2003 report was Table 2a

Table 4 Watersports participation numbers by ITV region 2004⁴

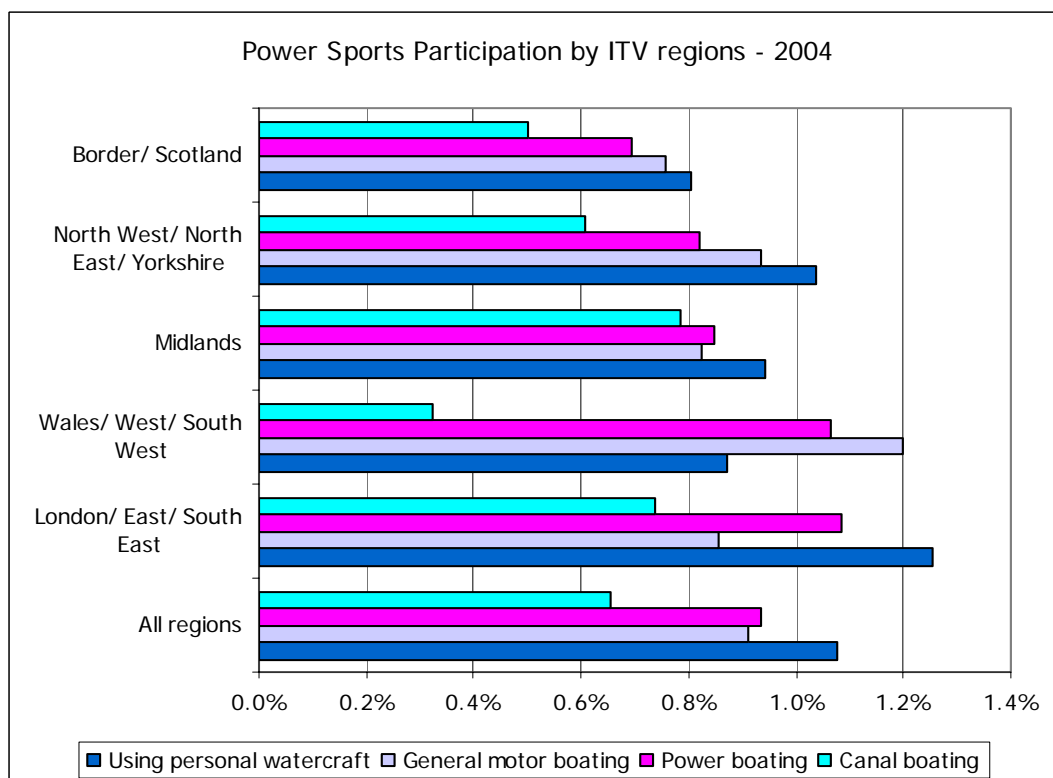
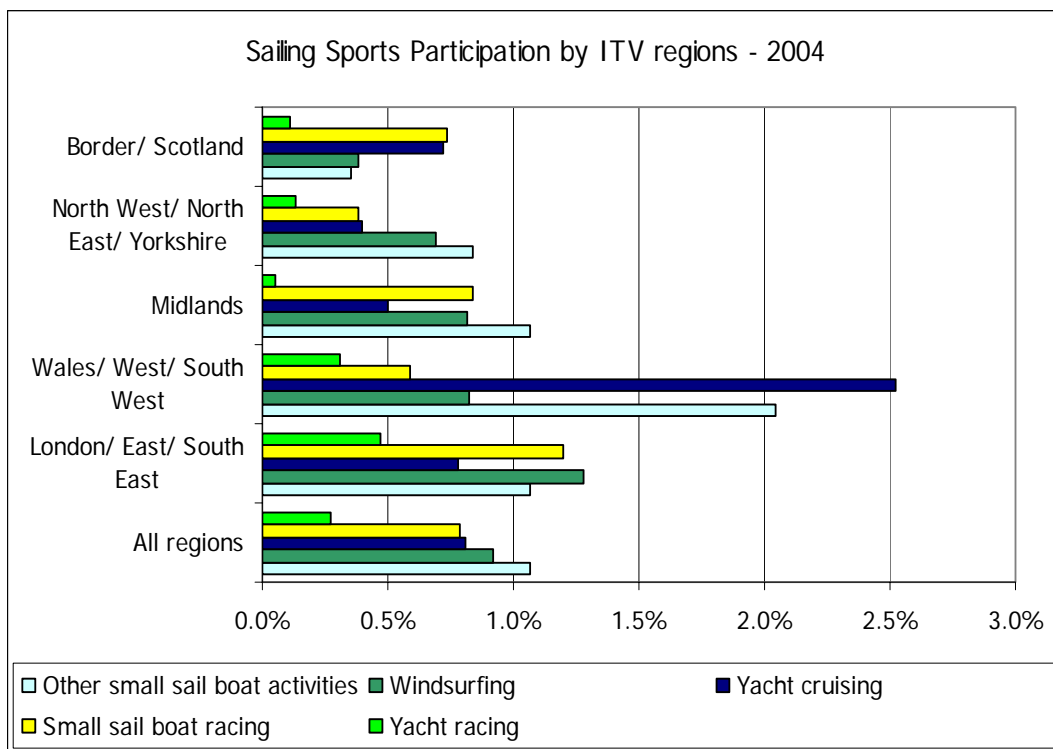
	ITV regions 2004					
	All regions	London/ East/ South East	Wales/ West/ South	Midlands	North West/ North East/	Border/ Scotland
Any watersport	3,735,347	1,413,573	508,095	523,850	1,102,704	192,123
Canoeing	1,245,116	392,659	140,858	189,801	441,081	64,041
Water skiing	553,385	251,302	60,368	83,512	137,838	20,013
Other small sail boat activities	599,500	219,889	115,705	113,880	124,054	8,005
Rowing	645,616	235,596	75,460	75,920	234,324	8,005
Windsurfing	507,269	267,008	45,276	53,144	110,270	12,008
Using personal watercraft	507,269	219,889	40,245	45,552	179,189	4,003
General motor boating	415,039	109,945	90,552	45,552	137,838	24,015
Yacht cruising	415,039	157,064	140,858	45,552	27,568	44,028
Power boating	461,154	204,183	65,398	45,552	124,054	16,010
Small sail boat racing	368,923	172,770	30,184	45,552	82,703	32,020
Canal boating	322,808	141,357	10,061	60,736	82,703	16,010
Yacht racing	138,346	94,238	5,031	7,592	13,784	0
None	42,380,053	14,292,796	4,522,547	7,068,182	12,681,090	3,810,439
Base	46,115,400	15,706,369	5,030,642	7,592,032	13,783,794	4,002,562

Base: all respondents (5967, Source Water Sports Omnibus Survey 2004)

Figure 4 Watersports participation by ITV regions



⁴ The number for this table in the 2003 report was Table 2b



In Table 5 we have combined the 2003 and 2004 sample to provide an average participation rate over the two seasons.

Table 5 Watersports participation by ITV regions– Average over 2003 and 2004⁵

ITV regions 2003/2004						
	All regions	London/ East/ South East	Wales/ West/ South West	Midlands	North West/ North East/ Yorkshire	Border/ Scotland
Any watersport	7.7%	8.3%	9.7%	7.4%	7.0%	5.2%
Canoeing	2.5%	2.4%	2.7%	2.8%	2.5%	1.5%
Water skiing	1.2%	1.3%	1.4%	1.2%	1.1%	1.0%
Other small sail boat activities	1.1%	1.1%	2.0%	1.1%	0.8%	0.4%
Rowing	1.3%	1.4%	1.2%	1.0%	1.4%	0.8%
Windsurfing	0.9%	1.3%	0.8%	0.8%	0.7%	0.4%
Using personal watercraft	1.1%	1.3%	0.9%	0.9%	1.0%	0.8%
General motor boating	0.9%	0.9%	1.2%	0.8%	0.9%	0.8%
Yacht cruising	0.8%	0.8%	2.5%	0.5%	0.4%	0.7%
Power boating	0.9%	1.1%	1.1%	0.8%	0.8%	0.7%
Small sail boat racing	0.8%	1.2%	0.6%	0.8%	0.4%	0.7%
Canal boating	0.7%	0.7%	0.3%	0.8%	0.6%	0.5%
Yacht racing	0.3%	0.5%	0.3%	0.1%	0.1%	0.1%
None	92.3%	91.7%	90.3%	92.6%	93.0%	94.8%
Base	46,115,400	15,706,369	5,030,642	7,592,032	13,783,794	4,002,562

⁵ The number for this table in the 2003 report was Table 2c

4. Frequency of Participation

Table 6 and Table 7 show the percentage of participants in each sport that reported their participation within each frequency group. The average frequency of participation is estimated from this data. We do not know whether participation was year round or only in the summer months.

The tables show that for most sports more participation takes place in GB. For example Yacht racing displays a large difference in average participation rates, 8.9 times a year for GB, compared to 1.8 times while abroad. Canal boating and rowing are the sports people are least likely to do abroad. However, there are some sports in which the biggest proportion of activity takes place abroad. Water skiing has the biggest proportion of people who only participate abroad. In 2004 almost half those participating in personal watercraft activities did so exclusively abroad.

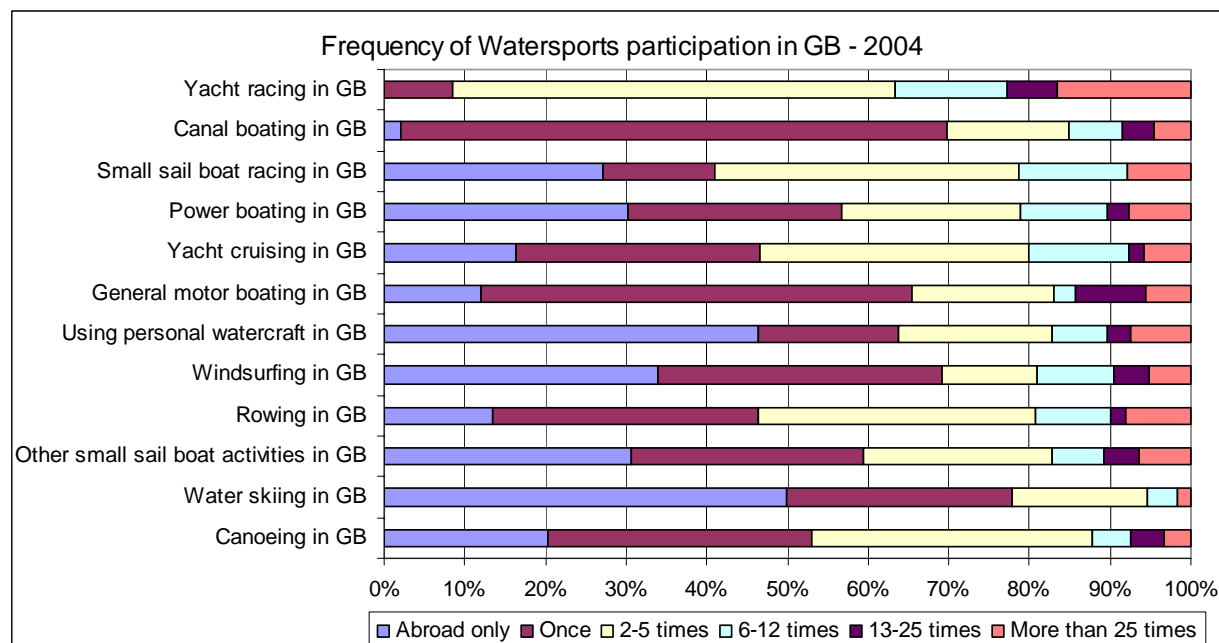
Table 6 Frequency of Participation: GB 2004⁶

	Frequency of Participation							Average participation 2004	Average participation 2003
	Abroad only	Once	2-5 times	6-12 times	13-25 times	More than 25 times	Base		
Canoeing in GB	19.5%	31.3%	33.3%	4.5%	4.0%	3.1%	123	3.6	3.6
Water skiing in GB	47.2%	26.5%	15.9%	3.6%	0.0%	1.5%	53	1.6	3.4
Other small sail boat activities in GB	30.3%	28.3%	23.1%	6.3%	4.2%	6.4%	62	4.4	5.2
Rowing in GB	12.9%	31.8%	32.9%	9.0%	1.9%	7.7%	65	5.0	5.7
Windsurfing in GB	31.2%	32.5%	10.8%	8.7%	4.1%	4.7%	48	3.7	3.4
Using personal watercraft in GB	45.3%	17.0%	18.6%	6.7%	2.9%	7.2%	49	4.1	3.8
General motor boating in GB	12.0%	53.4%	17.5%	2.7%	8.7%	5.6%	41	4.7	4.1
Yacht cruising in GB	16.3%	30.2%	33.5%	12.4%	1.7%	5.9%	47	4.7	2.6
Power boating in GB	28.4%	25.0%	21.0%	10.0%	2.6%	7.2%	45	4.5	5.7
Small sail boat racing in GB	24.9%	12.7%	34.6%	12.3%	0.0%	7.3%	37	4.6	4.1
Canal boating in GB	2.0%	63.9%	14.3%	6.1%	3.8%	4.3%	39	3.7	2.3
Yacht racing in GB	0.0%	8.0%	52.0%	13.1%	6.0%	15.6%	13	8.9	7.6

Base: all respondents who participate in watersports

Source: Watersports participation survey 2004

Figure 5 Frequency of watersports participation in GB



⁶ The number for this table in the 2003 report was Table 3a

Table 7 Frequency of Participation: Abroad 2004⁷

	Frequency of Participation						Base	Average participation 2004	Average participation 2003
	Never Abroad	Once	2-5 times	6-12 times	13-25 times	More than 25 times			
Canoeing Abroad	63.5%	17.6%	12.2%	2.5%	0.0%	0.0%	123	0.8	1.6
Water skiing Abroad	28.5%	25.6%	29.5%	7.3%	0.0%	3.7%	53	3.1	1.7
Other small sail boat activities Abroad	43.1%	22.9%	26.7%	3.6%	0.0%	2.3%	62	2.2	1.5
Rowing Abroad	70.8%	14.2%	9.3%	0.0%	0.0%	1.9%	65	1.0	1.7
Windsurfing Abroad	41.3%	25.6%	16.4%	6.1%	0.0%	2.4%	48	2.1	1.8
Using personal watercraft Abroad	42.7%	20.9%	26.7%	5.2%	0.0%	2.2%	49	2.3	2.1
General motor boating Abroad	50.5%	27.6%	19.2%	0.0%	0.0%	2.7%	41	1.8	0.5
Yacht cruising Abroad	56.1%	28.1%	14.6%	1.1%	0.0%	0.0%	47	0.9	0.9
Power boating Abroad	41.1%	14.4%	30.8%	2.8%	5.2%	0.0%	45	2.5	1.9
Small sail boat racing Abroad	40.3%	21.4%	24.7%	0.0%	0.0%	3.3%	37	2.1	1.4
Canal boating Abroad	81.4%	11.1%	0.0%	0.0%	0.0%	2.0%	39	0.7	0.2
Yacht racing Abroad	35.9%	9.9%	48.8%	0.0%	0.0%	0.0%	13	1.8	2.0

Base: all respondents who participate in watersports

Source: Watersports participation survey 2004

Figure 6 Frequency of watersports participation abroad 2004

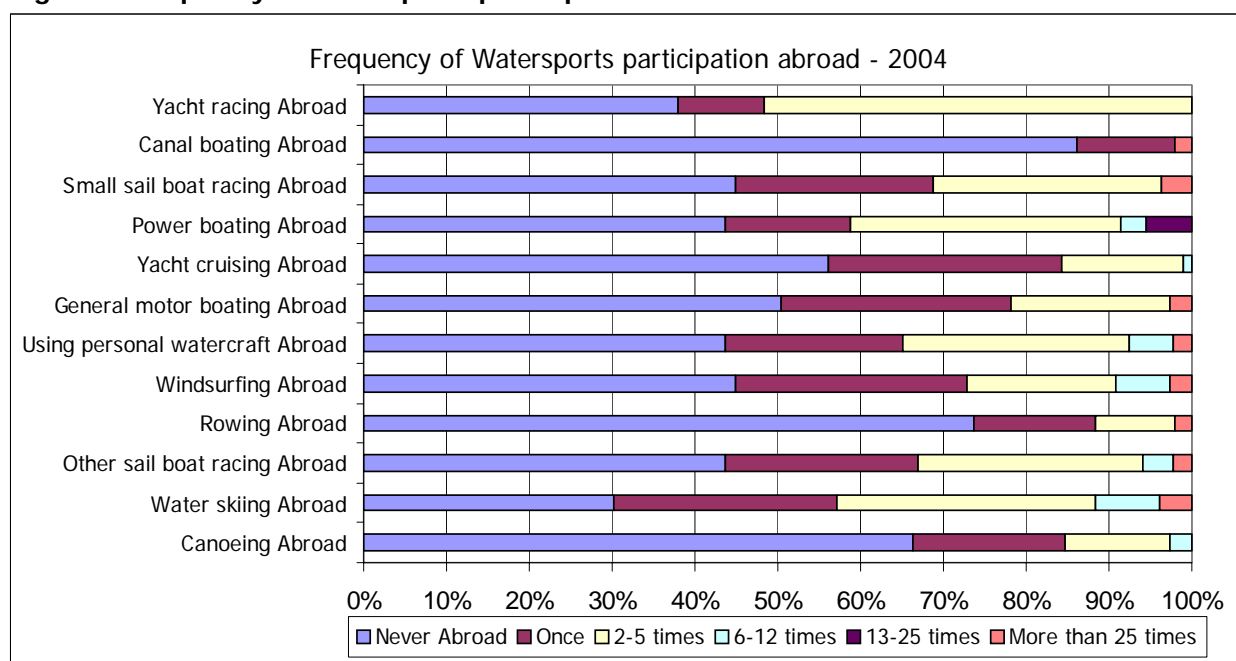


Table 8 and Table 9 convert the participation rates into estimates of how many people are participating how frequently in each sport.

⁷ The number for this table in the 2003 report was 3b

Table 8 Frequency of participation in GB (Numbers) 2004⁸

	Frequency of Participation					Total Number of participants
	Once	2-5 times	6-12 times	13-25 times	More than 25 times	
Small sail boat racing in GB	45,341	123,527	43,913	0	26,062	238,843
Other small sail boat activities in GB	166,112	135,590	36,979	24,653	37,566	400,899
Yacht racing in GB	9,568	62,195	15,668	7,176	18,658	113,266
Yacht cruising in GB	125,698	139,433	51,611	7,076	24,557	348,375
Power boating in GB	112,214	94,260	44,886	11,670	32,318	295,348
General motor boating in GB	220,825	72,368	11,165	35,977	23,158	363,493
Canal boating in GB	203,379	45,514	19,415	12,095	13,686	294,088
Canoeing in GB	383,342	407,836	55,113	48,989	37,967	933,247
Rowing in GB	203,641	210,685	57,634	12,167	49,309	533,437
Windsurfing in GB	160,573	53,360	42,984	20,257	23,221	300,395
Water skiing in GB	146,125	87,675	19,851	0	8,271	261,922
Using personal watercraft in GB	84,656	92,624	33,365	14,441	35,854	260,940

Base: all respondents who participate in watersports

Source: Watersports participation survey 2004

Table 9 Frequency of participation abroad (Numbers) 2004⁹

	Frequency of Participation					Total Number of participants
	Once	2-5 times	6-12 times	13-25 times	More than 25 times	
Small sail boat racing Abroad	76,401	88,183	0	0	11,781	176,365
Other small sail boat activities Abroad	134,416	156,720	21,131	0	13,500	325,767
Yacht racing Abroad	11,841	58,367	0	0	0	70,208
Yacht cruising Abroad	116,958	60,768	4,578	0	0	182,304
Power boating Abroad	64,635	138,248	12,568	23,341	0	238,792
General motor boating Abroad	114,134	79,398	0	0	11,165	204,697
Canal boating Abroad	35,329	0	0	0	6,366	41,694
Canoeing Abroad	215,553	149,418	30,618	0	0	395,589
Rowing Abroad	90,934	59,555	0	0	12,167	162,657
Windsurfing Abroad	126,482	81,028	30,138	0	11,858	249,506
Water skiing Abroad	141,162	162,667	40,253	0	20,402	364,485
Using personal watercraft Abroad	104,077	132,960	25,895	0	10,956	273,888

Base: all respondents who participate in watersports

Source: Watersports participation survey 2004

We first asked where participation took place in 2003. This means that we are able this year to compare 2004 responses with 2003. Table 11 shows the changes in the proportion of people carrying out any participation in GB and abroad. The change in Canal Boating implies a significant shift in preferences towards GB activities over those abroad. Bear in mind the yacht racing data is based on a small number of respondents, i.e. the 40.1% change in participation abroad could be caused by only a couple of respondents more answering they took part in yacht racing in 2004 compared to 2003.

⁸ The number for this table in the 2003 report was 3a2

⁹ The number for this table in the 2003 report was 3b2

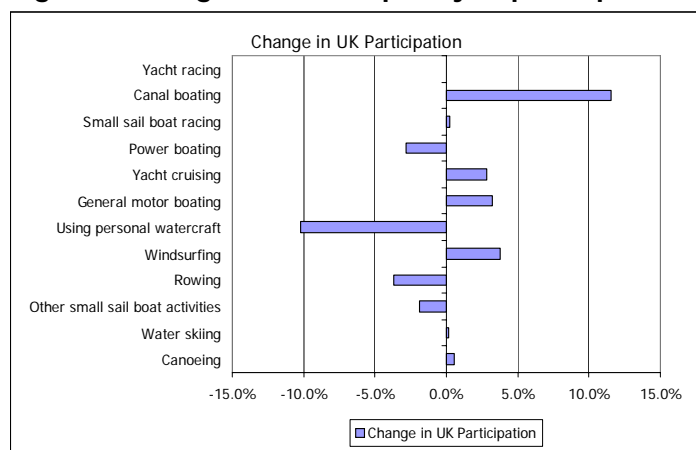
Table 10 Changes in Participation in GB and Abroad 2003 to 2004

	Any Participation in GB			Any Participation Abroad			Base
	Change in GB Participation	2004	2003	Change in Participation Abroad	2004	2003	
Canoeing	0.6%	80.5%	79.9%	-8.7%	36.5%	45.2%	123
Water skiing	0.1%	52.8%	52.7%	4.2%	71.5%	67.3%	53
Other small sail boat activities	-1.9%	69.7%	71.6%	11.1%	56.9%	45.8%	62
Rowing	-3.7%	87.1%	90.8%	-11.6%	29.2%	40.8%	65
Windsurfing	3.8%	68.8%	65.0%	-2.3%	58.7%	61.0%	48
Using personal watercraft	-10.2%	54.7%	64.9%	-8.7%	57.3%	66.0%	49
General motor boating	3.2%	88.0%	84.8%	20.5%	49.5%	29.0%	41
Yacht cruising	2.8%	83.7%	80.9%	-11.1%	43.9%	55.0%	47
Power boating	-2.9%	71.6%	74.5%	13.9%	58.9%	45.0%	45
Small sail boat racing	0.2%	75.1%	74.9%	16.7%	59.7%	43.0%	37
Canal boating	11.6%	98.0%	86.4%	2.6%	18.6%	16.0%	39
Yacht racing	0.0%	100.0%	100.0%	40.1%	64.1%	24.0%	13

Base: all respondents who participate in watersports

Source: Watersports participation survey 2004

Figure 7 Changes in the frequency of participation between 2003 and 2004 - GB



5. Where the Balance of Participation is taking place.

We are able to examine where the balance of people's participation is taking place. This set of results is derived from bringing together each persons reported activity in both UK and Abroad. Their activities are then categorised into six groups to show where each person is doing their sport.

GB only	Only participated in GB
High in GB low abroad	Participated more than 5 times in GB and less than 6 times abroad.
Low in GB and abroad	Less than 6 times in GB and abroad.
High in GB and abroad	More than 5 times in GB and abroad.
Low in GB and high abroad	Participated less than 6 times in GB and more than 5 times abroad.
Abroad only	Only participated abroad.

The data is presented as a table and pie charts for each water sport. It should be borne in mind that the numbers of people interviewed for each sport are small and therefore the data should only be taken as indicative of the overall patterns of participation.

Table 11 Where participation is taking place – average over 2003/2004¹⁰

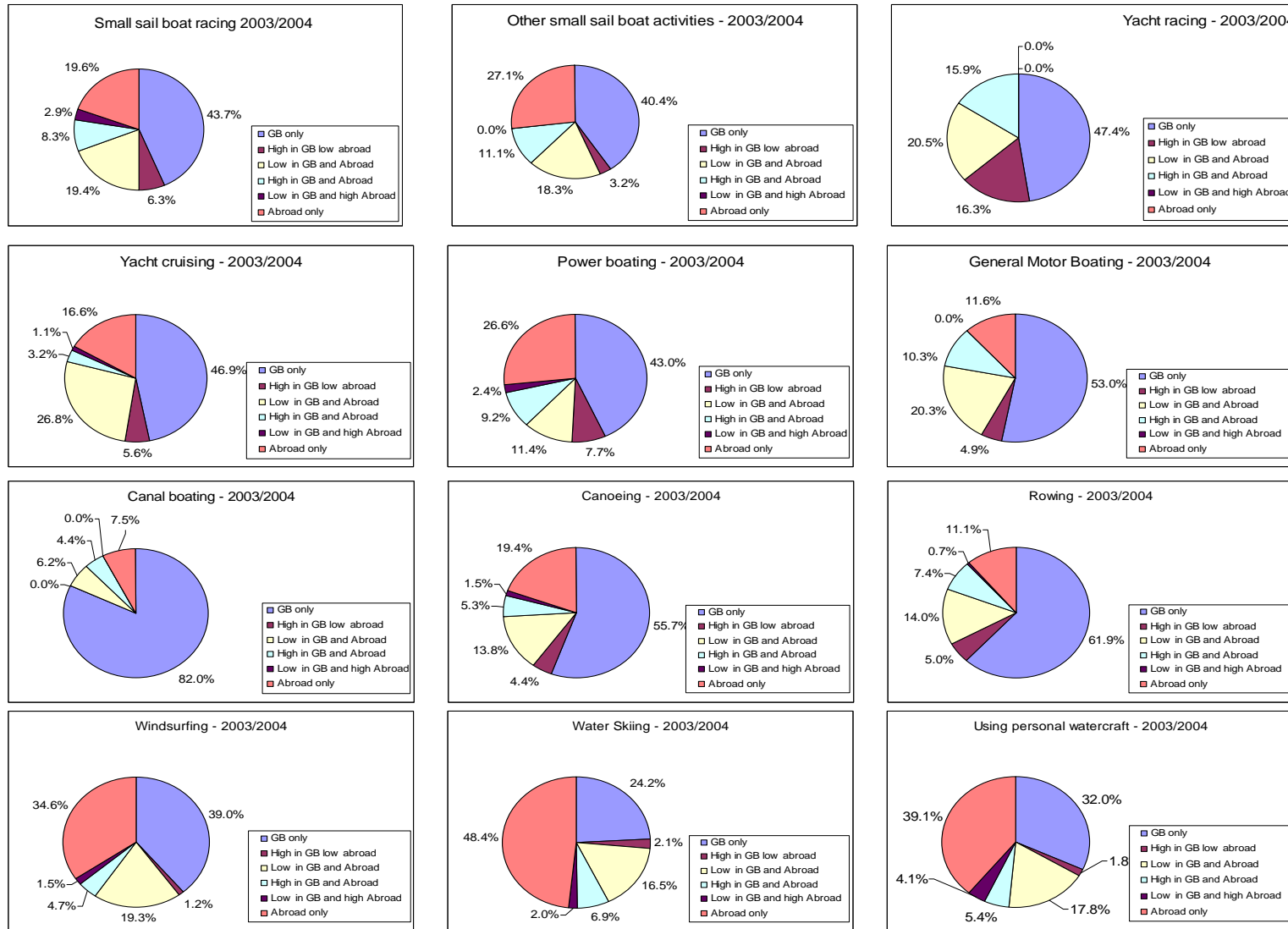
	GB only	High in GB low abroad	Low in GB and Abroad	High in GB and Abroad	Low in GB and high Abroad	Abroad only
Small sail boat racing	43.7%	6.3%	19.4%	8.3%	2.9%	19.6%
Other small sail boat activities	40.4%	3.2%	18.3%	11.1%	0.0%	27.1%
Yacht racing	47.4%	16.3%	20.5%	15.9%	0.0%	0.0%
Yacht cruising	46.9%	5.6%	26.8%	3.2%	1.1%	16.6%
Power boating	43.0%	7.7%	11.4%	9.2%	2.4%	26.6%
General motor boating	53.0%	4.9%	20.3%	10.3%	0.0%	11.6%
Canal boating	82.0%	0.0%	6.2%	4.4%	0.0%	7.5%
Canoeing	55.7%	4.4%	13.8%	5.3%	1.5%	19.4%
Rowing	61.9%	5.0%	14.0%	7.4%	0.7%	11.1%
Windsurfing	39.0%	1.2%	19.3%	4.7%	1.5%	34.6%
Water skiing	24.2%	2.1%	16.5%	6.9%	2.0%	48.4%
Using personal watercraft	32.0%	1.8%	17.8%	5.4%	4.1%	39.1%

Base: all respondents (5967)

Source: Watersports Omnibus 2004

¹⁰ The number for this table in the 2003 report was 3c (although then it wasn't an average figure)

Figure 8 Where participation is taking place



6. Combinations of Activities

We have aggregated the various sports into 3 groups to provide more robust estimates of cross participation and the socio-demographics of participation. For 2004 these groups are:

Sailing sports	Small sailboat racing, other small sailboat activities, yacht racing, yacht cruising and windsurfing.
Power sports	Power boating, general motor boating, canal boating and using personal watercraft.
Manual sports	Canoeing, rowing and water-skiing.

Table 10 presents numbers and percentages of the proportion of people who do each type of sport who also participate in other types of watersports.

Table 12 Grouped Watersports Combination 2004¹¹

People who do	Also do					
	Sail		Power		Manual	
	No.	%	No.	%	No.	%
Sail	1,587,002	100%	431,211	30%	620,355	32%
Power	431,211	27%	1,428,008	100%	443,835	23%
Manual	620,355	39%	443,835	31%	1,961,723	100%

Base: All who participate in one or other Watersports.

Source: Watersports Omnibus Survey – 2004

In table 11 we have combined data from 2003 and 2004 to provide an indication of the proportion of people who do each sport who also participate in other water sports. This increases the robustness of the estimates for individual sports at the cost of annual results. The data should not be considered to be statistically robust, but gives some indication of the connections between each of the sports. A much larger sample would be required to provide statistically robust data.

Table 13 Watersports combinations – average 2003/2004¹²

People who do...	Also do...											
	Canoeing	Water skiin activities	Other small sail boat		Using personal watercraft	General motor boating	Yacht cruising	Power boating	Small sail boat racing	Windsurfing	Canal boating	Yacht racing
			Rowing	%								
	%	%	%	%	%	%	%	%	%	%	%	%
Any Water sport	31.8%	15.9%	13.6%	16.5%	13.9%	11.9%	10.5%	12.0%	10.2%	11.7%	8.5%	3.3%
Canoeing	100.0%	12.3%	12.0%	19.9%	6.6%	8.3%	5.7%	12.4%	11.6%	12.9%	2.6%	2.9%
Water skiing	24.4%	100.0%	11.5%	15.4%	17.4%	14.3%	8.0%	26.9%	9.1%	17.7%	6.6%	3.9%
Other small sail boat activities	28.9%	12.9%	100.0%	19.0%	9.1%	9.0%	8.0%	16.3%	8.2%	12.7%	4.5%	0.6%
Rowing	38.3%	14.7%	14.9%	100.0%	7.4%	13.7%	8.1%	13.9%	12.9%	17.8%	5.8%	3.0%
Using personal watercraft	15.0%	19.8%	9.4%	8.9%	100.0%	12.1%	3.3%	17.0%	3.8%	8.3%	0.9%	2.1%
General motor boating	22.1%	19.1%	9.3%	19.1%	14.2%	100.0%	7.7%	13.7%	7.6%	7.3%	9.6%	1.4%
Yacht cruising	17.5%	11.8%	10.5%	12.6%	4.2%	7.9%	100.0%	14.1%	11.1%	14.7%	6.6%	10.3%
Power boating	32.5%	35.3%	18.9%	19.0%	19.5%	13.5%	12.0%	100.0%	13.5%	20.6%	5.6%	5.9%
Small sail boat racing	37.0%	14.2%	8.4%	21.9%	5.3%	8.9%	11.3%	16.5%	100.0%	18.2%	2.8%	10.0%
Windsurfing	34.6%	23.0%	14.5%	25.2%	9.8%	6.6%	13.5%	20.7%	14.0%	100.0%	2.8%	5.8%
Canal boating	9.7%	12.2%	6.7%	11.3%	1.4%	13.7%	8.6%	7.9%	3.2%	4.3%	100.0%	1.8%
Yacht racing	28.4%	18.9%	3.0%	16.1%	8.7%	4.7%	33.8%	21.7%	30.6%	23.9%	4.7%	100.0%

¹¹ The number for this table in the 2003 report was 4b

¹² The number for this table in the 2003 report was 4a

7. Water Sports Participation by Socio-Demographic Groups

In the section below we provide a profile of the people taking part in water sports. We show participation rates by age, sex, SEG, working status, ITV region and lifestage. The lifestage definitions have been constructed from the information available and their definitions are set out below.

Life Stage	Definition
Student/Workers house share	Two or more adults not living as married, without children and all under 35.
Single	One person living alone either single/widowed/divorced/separated.
Couple under 55	Two married or living as married no children and under 55.
Single parents	One adult with one or more child/children in household.
Family	Household of more than 2 people with children.
Empty nesters	Two people 55 to 65 living in house with no children
Greys	Two or more living over 64 in house with no children or living alone and over 64

The data is presented by the grouped activities as we would need a much larger sample to provide robust estimates for individual sports. In tables 13 and 14, the figures highlighted in orange indicate a possible significant rise compared to 2003, the ones highlighted in blue indicate a possible significant drop.

Table 14 GB Watersport participation by Socio-Demographic Groups - 2004¹³

		Watersport category				Population
		Any Watersport No.	Sail No.	Power No.	Manual No.	
Sex	Male	11.1%	4.6%	4.5%	5.9%	22,481,257
	Female	5.3%	2.4%	1.7%	2.7%	23,634,142
Age Group	16-34	12.9%	5.4%	4.4%	7.9%	13,815,222
	35-54	9.2%	3.7%	4.2%	4.6%	16,337,240
	55+	2.8%	1.4%	0.8%	0.8%	15,962,938
		4.4%	1.3%	1.8%	2.4%	24,730,117
SEG	AB	16.3%	8.0%	6.3%	9.0%	8,750,228
	C1	9.7%	4.4%	3.4%	4.5%	12,635,055
	C2DE	4.4%	1.3%	1.8%	2.4%	24,730,117
Working status	Working	11.5%	4.5%	4.6%	6.2%	24,265,941
	Retired	2.2%	1.3%	0.9%	0.2%	11,476,991
	Other Non-working	6.8%	3.4%	2.1%	4.2%	10,372,467
ITV regions	London/East/South East	9.0%	4.4%	3.5%	4.5%	15,706,369
	Wales/West/South West	10.1%	5.6%	3.4%	4.8%	5,030,642
	Midlands	6.9%	3.0%	2.4%	3.6%	7,592,032
	North West/North East/Yorkshire	8.0%	2.3%	3.3%	4.9%	13,783,794
	Border/Scotland	4.8%	2.1%	1.5%	1.8%	4,002,562
Life stage	Student/Workers house share	17.0%	7.6%	5.5%	11.9%	4,121,164
	Single	8.2%	4.9%	3.5%	2.3%	2,973,303
	Couple under 55	11.7%	5.6%	3.1%	6.7%	4,574,918
	Family	9.1%	3.2%	3.9%	5.0%	17,056,088
	Single parents	6.4%	3.4%	3.2%	2.0%	1,766,849
	Empty nesters	5.9%	3.0%	1.9%	1.5%	3,767,913
	Greys	1.1%	0.7%	0.2%	0.3%	9,237,440
Total	Total	8.1%	3.4%	3.1%	4.3%	46,115,400

Base: All respondents (5967)

Source: Watersports Omnibus Survey 2004

Note 1: Based on GB population 16 and over

Note 2: Population estimates based on population aged over 16 – "Marketing Pocket Book 2004"

Note 3: Sail includes small sail boat racing, other small sail boat activities, yacht racing, yacht cruising and windsurfing. Power includes power boating, general motor boating, canal boating and using personal watercraft.

¹³ The number for this table in the 2003 report was 5a

Table 15 GB Watersports participation by Sail/Power/Manual ¹⁴

		Watersport category				Population
		Any Watersport No.	Sail No.	Power No.	Manual No.	
Sex	Male	2,495,862	1,031,143	1,016,387	1,332,657	22,481,257
	Female	1,244,530	555,859	411,621	629,067	23,634,142
Age Group	16-34	1,788,388	747,676	606,455	1,097,949	13,815,222
	35-54	1,507,697	611,425	692,546	743,570	16,337,240
	55+	444,307	227,901	129,008	120,204	15,962,938
SEG	AB	1,424,282	703,132	548,634	790,170	8,750,228
	C1	1,221,429	554,470	424,410	570,293	12,635,055
	C2DE	1,094,681	329,400	454,965	601,260	24,730,117
Working status	Working	2,783,512	1,080,439	1,108,114	1,498,345	24,265,941
	Retired	252,565	149,187	103,151	28,372	11,476,991
	Other Non-working	704,315	357,377	216,743	435,006	10,372,467
ITV regions	London/East/South East	1,411,502	685,635	554,603	699,134	15,706,369
	Wales/West/South West	510,451	281,015	172,004	239,675	5,030,642
	Midlands	523,624	226,829	182,802	274,772	7,592,032
	North West/North East/Yorkshire	1,103,288	310,505	457,721	675,892	13,783,794
	Border/Scotland	191,527	83,018	60,878	72,250	4,002,562
Life stage	Student/Workers house share	702,071	314,192	227,620	489,522	4,121,164
	Single	242,590	145,574	103,485	66,898	2,973,303
	Couple under 55	534,880	258,343	139,660	305,583	4,574,918
	Family	1,551,716	537,544	672,005	847,901	17,056,088
	Single parents	112,199	59,762	56,073	36,079	1,766,849
	Empty nesters	223,113	114,076	71,311	56,708	3,767,913
	Greys	98,410	66,418	15,165	23,200	9,237,440
Total	Total	3,740,392	1,587,002	1,428,008	1,961,724	46,115,399

Base: all who participate in all or other water sports

Source: Watersports Omnibus 2004

Table 16 GB Watersports participation by Sail/Power/Manual – average over 2003/2004

		Watersport category			
		Any Watersport	Sail	Power	Manual
Sex	Male	10.6%	4.2%	4.3%	5.7%
	Female	4.9%	2.1%	1.8%	2.5%
Age Group	16-35	12.9%	4.8%	5.0%	8.0%
	35-54	8.2%	3.2%	3.4%	3.9%
	55+	2.5%	1.4%	0.8%	0.7%
SEG	AB	14.6%	6.8%	5.3%	8.1%
	C1	9.6%	3.8%	3.9%	4.9%
	C2DE	4.3%	1.4%	1.8%	2.2%
Working status	Working	10.7%	4.1%	4.5%	5.6%
	Retired	1.8%	1.0%	0.7%	0.3%
	Other Non-working	6.9%	2.9%	2.1%	4.6%
ITV regions	London/East/South East	8.3%	3.8%	3.3%	4.1%
	Wales/West/South West	9.7%	5.3%	3.0%	4.4%
	Midlands	7.4%	2.7%	3.1%	4.0%
	North West/North East/Yorkshire	7.0%	2.1%	3.0%	4.3%
	Border/Scotland	5.2%	1.8%	2.1%	2.8%
Life stage	Student/Workers house share	17.4%	7.5%	6.6%	12.1%
	Single	8.5%	4.0%	3.8%	3.5%
	Couple under 55	11.2%	4.3%	4.0%	6.2%
	Family	8.3%	2.9%	3.3%	4.3%
	Single parents	4.5%	2.2%	2.0%	1.7%
	Empty nesters	5.0%	2.9%	1.9%	0.9%
	Greys	1.1%	0.6%	0.2%	0.3%
Total	Total	7.7%	3.1%	3.0%	4.1%

¹⁴ The number for this table in the 2003 report was 5b