

RNLI | Research Project ID: 12-13b

Canoeing and kayaking audience profiling

Sponsor: RNLI Coastal Safety
Department: RNLI Operations Research Unit
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Contractor: mruk research
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Summary

Canoeing and kayaking are two of the most popular watersports activities in Britain¹, with an estimated 3% of the adult UK population participating in either sport at least once during 2013. Both sports are also experiencing significant growth in participation. The RNLI, in partnership with the British Canoe Union (BCU), commissioned this project to understand more about participants' attitudes to risk and safety.

The research was designed to assist with the development of coastal safety campaigns

and messages that are closely targeted towards those canoeists and kayakers (referred to in this report as paddlers) who are most likely to get into difficulties or to require the assistance of our lifeboat crews or lifeguards.

RNLI data shows that our crews and lifeguards responded 422 times to canoe/kayak incidents in 2013. Also, figures from the Maritime and Coastguard Agency (MCA) canoe and kayak incident reports (2010–12) suggest there are, tragically, an average of seven coastal fatalities each year among paddlers in the UK.

One factor that was clear from the start of the project was the enormous variation that exists in the types of paddling that take place in the UK. The project sought to accommodate this through a mixed-method approach, which was subsequently used to identify six broad segments based on participants' frequency and type of paddling.

This project presents our approach to the research, as well as a summary of these six segments.



Photo: RNLI / Nigel Millard

¹Watersports Participation Survey 2013, Arkenford Limited

Research aims and objectives

The aims of the project were to:

1. profile participants in coastal canoeing/kayaking according to their patterns of participation, attitudes to risk and safety behaviours
2. produce an accessible segmentation that the RNLI and partners can use to plan campaigns and messaging with high-risk segments.

The objectives of the research were to deliver:

- information on the type of participation in coastal canoeing/kayaking in the UK and how this varies by demographic characteristics
- a behavioural segmentation of coastal canoeists/kayakers based on their level of participation in the sport, the precautions they take and their attitude to safety/risk
- profiles of attitudes to risk and information on the most effective modes of communication with participants and other stakeholders such as coaches and rental firm owners
- a library of the findings that the RNLI stakeholders will be able to return to later as they develop communications materials.



Photo: Tim Parker

Method and approach

A mixture of six elements was used in the research:

- telephone interviews with stakeholders
- web survey
- face-to-face survey conducted by RNLI volunteers
- qualitative focus groups with paddlers in three locations
- contextual interviews among paddlers and informed local sources in three locations
- follow-up discussions with stakeholders to discuss and test the results.

All participants in the research had paddled in the UK in 2012 and/or 2013 with the exception of some of the local interviewees, who were, for example, hire shop managers or lifeguards.

Stakeholder interviews

The stakeholders interviewed at the start of the project included the British Canoe Union (BCU), Scottish Canoe Union (SCU), RNLI, academics, safety managers, expert kayakers and coaches. The interviews were used to inform the design of subsequent phases of the research and covered topics such as:

- trends within the sport
- motivations for taking part
- concerns regarding safety
- people most at risk
- kayaking activities and locations that pose the most risk
- impact/relevance of different types of boat and equipment
- important safety behaviours
- what needs communicating to participants and how to do it.

Surveys – web and face-to-face

The surveys consisted of 22 questions that focused on paddling behaviour (including location and type of craft used), attitudes to risk, precautions and safety behaviours when paddling, and safety incident experiences.

The survey ran during July and August 2013. A social media and press campaign by the RNLI, mruk and BCU was used to elicit an online response from 868 paddlers. This sample was supplemented by a further 207 paddlers who were part of a consumer panel run by GMI. RNLI volunteers also completed the survey face to face with 71 paddlers. Of the 1,146 respondents, 1,130 provided enough information to allow us to allocate them to segments.

Qualitative and contextual research

Paddlers with varying levels of experience were interviewed at three locations – Poole, Anglesey and the Clyde. These locations were chosen because of the different types of canoeing and kayaking at each and the different environmental conditions and challenges they provide.

The focus groups were conducted for 90 minutes and included paddlers with a variety of qualifications and motivations for paddling – club members and non-club members, tourists and locals, and paddlers with and without qualifications.

Contextual unstructured interviews of 10 minutes provided a more random sample of paddlers at the three locations.

Areas of discussion during the focus groups and contextual interviews included:

- motivations for paddling
- experience/training/qualifications of participant
- dangers experienced
- perceptions of danger
- equipment usage and its necessity
- safety behaviours and their necessity
- communication/information needed/wanted
- channels for communications.

Unstructured interviews covering similar topics were also conducted with local people knowledgeable in various aspects of canoeing/kayaking including lifeboat crews, coastguard rescue officers, hire shop owners, boat builders, coaches, activity centres, beach wardens, and retail outlet owners.



Photo: Tim Parker

Analysis

The results were analysed in three stages:

1. Overall responses were summarised, providing a profile of paddlers according to demographic indicators and participation habits.
2. Responses to questions on safety incidents that paddlers had experienced were used to build a risk score for each type of water paddled in.
3. Paddling experience and their usual type of paddling (including usual locations) were used to identify segments of paddlers.

The sample groups (social media campaign, panel respondents and face-to-face interviews) were checked for bias.

The consumer panel respondents were younger and included a higher proportion of women, less experienced and infrequent paddlers, and contained a lower proportion of BCU members. The panel respondents were felt to be a more random sample and more representative of paddlers as a whole.

As a result, the overall response data was then weighted to match this sample, using experience as the main factor for the weighting, but also taking into account the levels of participation of each of the three groups shown in the table below.

All results are based on this weighted data.

	Target (%)	Overall sample (%)	Weighting
Novice	32	21	1.51
Intermediate	35	37	0.96
Advanced	33	42	0.78

Key findings

Analysis of our weighted sample was used to provide a brief profile of our respondents. This found that:

- Most (77%) are male and over half (55%) are between 35 and 54 years old.
- Key motivations to paddle are relaxation and getting away, and spending time with friends and family.
- Over a third of respondents (39%) are infrequent paddlers – going out a few times a year or even less.
- Around one fifth (22%) are regular paddlers – going out often but not all year round.
- A further 39% are frequent paddlers going out all year round, some more than once a week. Many of this group are advanced paddlers.
- Finally, many paddlers report taking extensive safety precautions the last time they went out paddling – 87% checked local weather forecasts, 83% told someone where they were going, 92% wore personal flotation devices (PFDs), 79% carried a mobile phone, and over 60% took a tow line, waterproof clothing, wetsuit/drysuit, spare clothing and first aid kit.

Six segments of paddlers

The project found, as expected, that the variation in the type of paddling taking place around the UK coastline is enormous.

The broad headline of 'canoeing and kayaking in the UK' includes formal and informal networks of clubs and groups, different cultures and sub-cultures, and important differences between the many disciplines within the overarching banner of paddling.

It was not the aim of the research to attempt to account for all of these variations in the segments, but instead to acknowledge that they exist and to seek simple categories that could be used to understand more about each group.

The research team also found that motivations to paddle could be used to define some groups of paddlers and help us to distinguish attitudes to risk and safety and different communications methods for different canoeists and kayakers.

The research identified six segments of paddlers. The size of the segments is shown in Figure 1, and each is summarised (see next page):

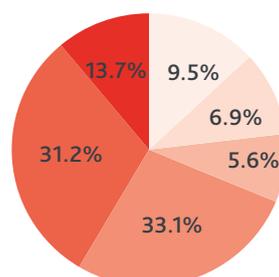


Figure 1: Segments of paddlers



Photo: Rod Kipparick/PICTURENOW

1. Messing around in boats
2. Learners
3. Ambitious novices
4. Relaxing and keeping fit
5. Explorers and nature enthusiasts
6. Sports and thrill seekers

**Segment 1 – Messing around in boats
(9.5% of audience, 107 paddlers in sample)**

This segment mainly paddles for leisure, participates in less demanding activities and many do not aspire to become serious paddlers. They are infrequent or occasional paddlers and the social side of the sport is important to them. They tend to participate in relatively benign conditions and are a low risk group.

'I've been paddling for years with my family. This is something we've always done together and it's fun. We just go out there and paddle for a bit and mess about on the water.'



Photo: RNLI/Nathan Williams

**Segment 2 – Learners
(6.9% of audience, 78 paddlers in sample)**

In this segment, paddlers are interested in progressing as paddlers and taking part in slightly more challenging activities. They have high awareness of risks and take precautions to prevent getting into serious trouble. These paddlers are enthusiastic about gaining knowledge and improving their skills, and are particularly receptive to information that gives them an understanding of sea conditions and safety measures.

'I can swim. So when I go out, I make sure I only go to the point where I know I can swim back if something happened.'



Photo: Chris Adams

**Segment 3 – Ambitious novices
(5.6% of audience, 63 paddlers in sample)**

Paddlers in this segment are less experienced but see the sport as an exciting challenge so they like to push themselves. The research suggests that this group may be at risk. Although this segment experiences a similar number of incidents to other novice segments, the type of incidents tends to be more serious, such as being unsure of their location.

'I have a lifejacket and I know I can swim, so I'll be fine if I get in danger. I don't spend time reading up about all the other equipment because I don't think I need it. It's just common sense.'



Photo: Chris Adams

Segment 4 – Relaxing and keeping fit (33.1% of audience, 374 paddlers in sample)

In this segment, paddlers are enthusiastic and like to build on their experience levels. They take part in some challenging activities, but are aware of safety concerns and their limitations. They are unlikely to find themselves in danger, unlike the other intermediate and advanced segments.

'I was paddling and I got the angles all wrong and I got rolled. I can't do an Eskimo roll but I managed to get out of my boat and was rescued by another crew. It's made me want to learn how to roll my kayak and I'm now working on it.'



Photo: Chris Adams

Segment 5 – Explorers and nature enthusiasts (31.2% of audience, 353 paddlers in sample)

This segment has dedicated paddlers who are constantly looking to better themselves. Although they are often well-equipped, they paddle in demanding waters. The fact that an element of their sport involves seeking new locations to explore introduces further risk factors. The research suggests this group is medium risk.

'It's about being able to do something different every year, either going to somewhere more challenging or being able to handle more challenging conditions on my own.'



Photo: Tim Parker

Segment 6 – Sports and thrill seekers (13.7% of audience, 155 paddlers in sample)

Paddlers are highly experienced in this segment but they are motivated by the thrill of the sport, often consciously taking risks that can put them in danger. This group does not seek a risk-free paddle; they like to learn from their mistakes and they get a thrill from overcoming challenges. The research suggests this group is medium risk.

'For me, it's the adrenaline rush. I want to be able to paddle more in fast moving water and among rocks.'



Photo: Tim Parker

Communications messages

The qualitative research identified three broad themes that the RNLI and its partners can use to communicate with the different segments:

Theme	Segments	Materials
Beginners' basics	1 Messing around in boats 3 Ambitious novices	Informative and cover basic safety principles.
Getting your sea legs	2 Learners	Geared to their growing knowledge of the sport, their interest in progression and their general desire to participate responsibly.
Paddlers' tales	4 Relaxing and keeping fit 5 Explorers and nature enthusiasts 6 Sports and thrill seekers	Enhance their ability to enjoy risks and danger but still remain safe. Allow paddlers to share their experiences and learn from each other.

How the RNLI is using the evidence

The RNLI's Coastal Safety Team is using the evidence to promote safety messages to two of the key segments identified by this research – ambitious novices and sports and thrill seekers. We are working with the BCU to create campaigns and messages that encourage these groups to continue to enjoy their sport safely, while taking further safety measures such as carrying a means of calling for help.

For the latest safety advice for paddlers, please see the Coastal Safety section of the RNLI website at RNLI.org.

If you are interested in finding out more about this study, please contact Tom Walters, Research Manager for the Operations Department:
Thomas_Walters@rnli.org.uk.

Further reading

Powell (2009). *Injuries and Medical Conditions Amongst Kayakers Paddling in the Sea Environment*, Wilderness and Environmental Medicine, volume 20.

Young, A. *Canoe and Kayak Incident Reports 2010–12*, Southampton: Maritime and Coastguard Agency.

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