BRITISH MARINE
LEADING THE INDUSTRY

LEISURE BOATING & WATERSPORTS

► F U T U R E S ►

THE FUTURES PROJECT PURPOSE

OUR VISION IS TO INCREASE THE NUMBER OF PEOPLE
enjoying all forms of Boating and associated Watersports throughout their lives

GROWTH IS NOT COMING FROM TRADITIONAL BOATING ACTIVITIES

- Sailing, power/motor or windsurfing

Activities that are showing growth trends

- Canal boating
- Canoeing
- Surfing & body boarding
- Paddle boarding
- Sea fishing

INTRODUCTION

In response to the concerns of British Marine members, detailed research was undertaken during 2017 to establish the facts behind perceived industry views regarding the future shape of the leisure marine consumer market.

Specifically, leisure boating customer numbers appear to be declining with fewer younger or new customers joining the market.

FOUR KEY AREAS WERE RESEARCHED AS FOLLOWS:

Social Context of future customers
What is happening in the wider world that will affect future boating and Watersports participation

Statistics and Trends
What the numbers tell us now about boating, Watersports and other outdoor activities.

Emerging Themes The trends that will influence boating and Watersports participation

Benchmarking against other leisure sectors
Identifying data gaps, examining what needs to be done so that the marine sector has a clear picture to act upon and comparing ourselves with other sectors.

A detailed **Futures** report presenting the findings on the above was published on the British Marine website (*www.britishmarine/futures*) and this Executive Summary outlines how each of the identified topics are to be developed as part of a new and evolving 'Futures Strategy'.

FUTURES

OUR AUDIENCE IS CHANGING

Research shows that we have 5 main audiences (outlined below). With the majority of the population in categories Generation Y – Z who are in the digital age and looking for more short burst experiences that they can enjoy and share online with friends and family instantly. With less time it's all about what they do and have done as opposed what they own.

Maturists (pre 1945)

Communication preference

Baby boomers (1945-1960)

Communication preference

Generation X (1961-1980)

Communication preference

Generation Y (1981-1995)

Communication preference

Generation Z (Born after 1995)

Communication preference

UNDERSTANDING OUR MARKET

- **TRENDS** – Irreversible social trends are transforming the leisure boating sector
- **SOCIAL NETWORKS** – are a huge influence on new generation's personal choices
- **PAY & PLAY** – Long-term participation in boating is declining particularly in activities: difficult to find - complex to do - requiring commitment
- **SPORT** – Boating is seen as a sport: 17 million 20-30yrs olds prefer functional and lifestyle experiences
- **PRODUCT v BENEFITS** – Leisure boating often sells its products rather than the lifestyle benefits: new generations are not attracted by detailed information. They seek experiences!
- **COMMITMENT** – New generations don't want the commitment of owning a boat or joining a club
- **INSTANT RESULTS** – Consumers expect instant gratification and lack the patience to break barriers such as: finding a boat, joining a sailing club, going to boat shows or searching for information online. The new generation expects to look, book and buy online
- **WHY LEAVE?** – There is a huge propensity to stop sport in mid 20s: 41% of people who stopped doing outdoor activity said they were just "too busy"
- **COMPLEX** – Formal training or qualification isn't attractive: other sports are competing for the same audience and are easier to access
- **SALES** – Peer-to-peer selling, pay-as-you-go, easy booking and buying - an emerging collaborative economy. Artificial intelligence is driving new platforms and mobile is the most popular way to get online

BOATING TRENDS

- 16-54 yrs in steep decline
- Traditional boating sail & motor
- Windsurfing
- Waterskiing
- Not catering to casual users
- Peer-to-peer influence (fewer friends & family participating)

- Easy access watersports
- Wider choice of on-water activity
- 55yrs+ want more boating
- SUP, canoe/kayaking
- Canal boating
- Sea fishing

SOCIAL CONTEXT

- Want EXPERIENCE
- Always ON
- Want NOW
- PAY-as-you-GO
- PEER-to-PEER
- ONLINE Communities
- FESTIVALS not shows
- AGEING Population
- Fewer YOUNG ADULTS
- INSTANT ACCESS
- No COMMITMENT
- INFORMAL Sport
- SUBSCRIPTION Society
- Extended FAMILY
- Ashamed of looking STUPID
- FEAR of trying something new

Resources

British Marine offers a wide selection of resources for the marine industry.

This includes guidance and best practice documentation on key industry issues and topics, plus a number of books, magazines, reports, informational guides and other media. Many are available to download and a number of these are exclusive or significantly discounted to members.

Our Resources by Type

- Publications
- Knowledge Centre
- Our Websites

Search our resources...

Knowledge Centre

LATEST

- What Does the GDPR Mean for Global Data Protection? FREE
- Business Rates Revaluation 2017

POPULAR

- What does the EU Referendum mean for the UK marine industry? MEMBER EXCLUSIVE
- Council tax for residential moorings

Publications and Downloads

LATEST

- Watersports Participation Survey 2017 - summary FREE
- Watersports Participation Survey 2017 -

POPULAR

- British Marine Logo Set MEMBER EXCLUSIVE
- British Marine Member Logo Set MEMBER EXCLUSIVE

Executive Summary

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FUTURES