



LEISURE BOATING & WATERSPORTS



► F U T U R E S ►

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 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**
- ▶ **Statistics and trends**
- ▶ **Emerging themes**
- ▶ **Benchmarking against other leisure sectors**

A detailed **Futures** report was published on the British Marine website (www.britishmarine.co.uk/futures) and a number of key recommendations and plans have been agreed, that will now be implemented, ensuring that suppliers and manufacturers across the Leisure Boating and Watersports sector can successfully meet future demands and customer needs.

Our findings and recommendations are outlined in this booklet.





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)
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- 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



WHAT NEXT? PHASE 1

To ensure that the Leisure Boating and Watersports sector meets the needs of both our current and future customers, British Marine is developing a new **Futures** strategy to help suppliers and manufacturers to attract and retain the **Future** customer.

Working with key industry partners, the aim is to develop the themes and ideas highlighted on the back cover to assist British Marine members and other key stakeholders to provide the service and support that will maintain the UK's position as a leading maritime nation. We must respond now to social and demographic changes and we must all work together to achieve this aim.

CHANGE NOTHING AND NOTHING CHANGES

1 | SHARE, DISSEMINATE AND EDUCATE

We need collaboration across the whole marine leisure sector and this can only be achieved if the industry understands exactly what changes are needed. We will provide this for British Marine members and key industry stakeholders to ensure that our conclusions and action points are understood and acted on.

2 | MARKETING AND PRODUCT

- ▶ We have to better understand what will trigger participation, ownership and accessibility of boating and watersports so we can meet these new needs
- ▶ We have to be more easily found online and be more accessible in person by potential customers. We will work with the industry to develop methods to ensure our members and their products and services can be easily accessed
- ▶ We will invest in research to fill our information and data gaps. We'll examine each audience type from Maturists to Generation Z to provide valuable insights to identify and meet their needs in a way they expect
- ▶ We will work to ensure our industry brands convey benefits, not just features, and that the leisure and boating industry projects lifestyle appeal
- ▶ We will identify a way to overcome the barrier of ownership and commitment and find new flexible ways to offer access to boating and watersports
- ▶ We will research similar markets and identify how other sports are finding and attracting new participants and develop a best practice approach
- ▶ We will identify why people leave and develop a strategy to stem the flow and reverse the trend.

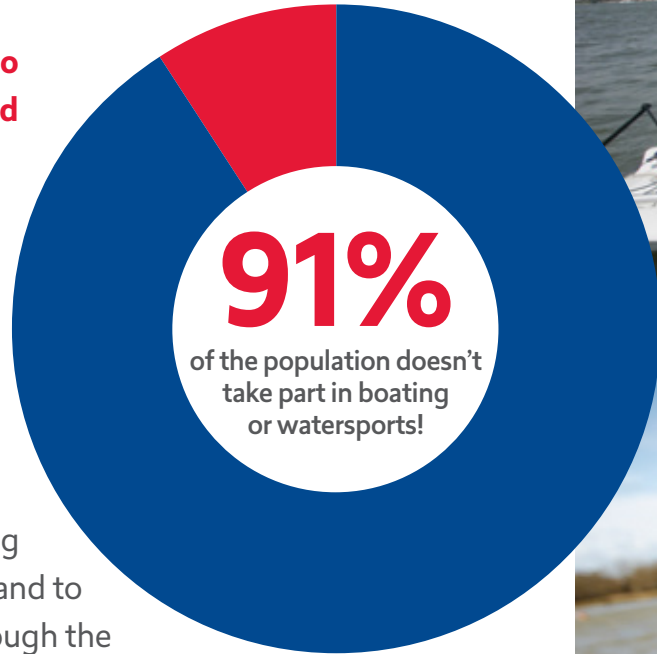


REVERSING THE DECLINE IN BOATING ACTIVITY





















British Marine is committed to helping members identify and understand new approaches to reverse the decline in boating activity.

We will ensure we continue to provide members with support, intelligence and expertise.

We are committed to providing exceptional member benefits and to inspire and lead members through the changing marine landscape.



OUR FUTURE CUSTOMERS WILL BE DIFFERENT!

TALKING A DIFFERENT LANGUAGE					
	MATURISTS PRE-1945 Wartime rationing Rock n Roll Nuclear families Defined gender roles particularly for women	BABY BOOMERS 1945–1960 Cold War Swinging 60s Moon landings Youth culture Woodstock Family-oriented	GENERATION X 1961–1980 Fall of Berlin Wall Reagan/Gorbachev/Thatcherism Live Aid Early mobile technology Divorce rate rises	GENERATION Y 1981–1995 9/11 terrorist attacks Social media Invasion of Iraq Reality TV Google Earth	GENERATION Z BORN AFTER 1995 Economic downturn Global warming Mobile devices Cloud computing Wiki-leaks
FORMATIVE EXPERIENCES >>					
ATTITUDE TO CAREER >>	 Jobs for life	 Organisational – careers are defined by employees	 'Portfolio' careers – loyal to profession, not employers	 Digital entrepreneurs – work 'with' organisations	 Multitaskers – will move seamlessly between organisations and 'pop-up' businesses
SIGNATURE PRODUCT >>	 Car	 Television	 Personal computer	 Tablet/smartphone	 Google glass 3D printing
COMMUNICATION MEDIA >>	 Formal letter	 Telephone	 email and text message	 Text or social media	 Hand held communication devices
PREFERENCE WHEN MAKING FINANCIAL DECISIONS >>	 Face-to-face meetings	 Face -to-face ideally but increasingly will go online	 Online – would prefer face -to-face if time permitting	 Face -to-face	 Solutions will be digitally crowd-sourced

FUTURES PROJECT »»

Our Vision is to increase the number of people enjoying all forms of Boating and associated Watersports throughout their lives.

ENGAGE & PROMOTE »»

- »» Increase the number of regular participants through improved marketing and communications
- »» Refresh the profile and image
Increase appeal as social, fun, healthy, family & enjoying nature
- »» Targeted diversity
- »» Create adventure and challenge
Modernise and enhance boat shows and events
- »» Focused national campaigns with strategic partners to drive the profile up

PATHWAYS & LOCATIONS »»

- »» Shift from supply-side to demand-led approach (Pay & Play)
- »» Broader Delivery Network (Marinas & Boatyards)
- »» Improve and strengthen pathways into boating and watersports
- »» Showcase activities through a series of national and local events
- »» Connect customers and newcomers through a single and easily accessible online database detailing where and how to get afloat

STAYING ACTIVE & CONNECTED »»

- »» Encourage more people to continue with boating and watersports through their changing life stages
- »» Highlight Governing Bodies and benefits of Club Membership
- »» Encourage volunteers and general participation across all levels
- »» Provide guidance on courses and knowledge transfer via online information and through the promotion of clubs and training centres

► F U T U R E S ►

britishmarine.co.uk/futures

WORKING WITH OUR KEY STAKEHOLDERS

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LEADING THE INDUSTRY

**BRITISH
CANOEING**

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