

How to Generate Enthusiasm for Boating!



Profile of a Boating Enthusiast

- Emmanuel Allot: nearly 60 years old
- Started sailing with family as a child
- Professional skipper for 10 years: Turkey, Greece
- Crossed the Atlantic in 1976
- Opened own charter company in 1978
- Has been working for The Moorings and Tui Marine since 1990
- Last time sailing: November 2012 (Solent)

- Passionate and Entusiastic about Sailing

Why this question of enthusiasm?

- Are we getting old ?
- Did we miss something ?



- Do we need new challenges ?



1970-2010 : A lightning development

- French Market Example
- Boating has known a lightning development over the last 40 years

Boat Type	1970	2011
Sailing	34 854	165 519
Power	79 315	676 276
Other	9 057	42 169
Total	123 226	883 964

Source : Fédération des Industries Nautiques. French Market Only.

- A success based on certain values in the Western world's 1970s :
 - A more careful approach of the environment, a longing for nature;
 - A desire for conviviality, for the friendship of a human adventure;
 - A need to belong to a group;
 - A need for new challenges, for journey, for exoticism, for freedom;
 - A desire to own dream objects.

1970-2010 : Evolution of the demand

- Success mainly concerned the generation born in the 1950s

FRENCH OWNERS' AGE - 2011		
Sailing Boat from 10 to 18 m	27 900	
Owner 50+	22 340	80%
Owner 60+	13 352	60%

Source : Fédération des Industries Nautiques. French Market Only.

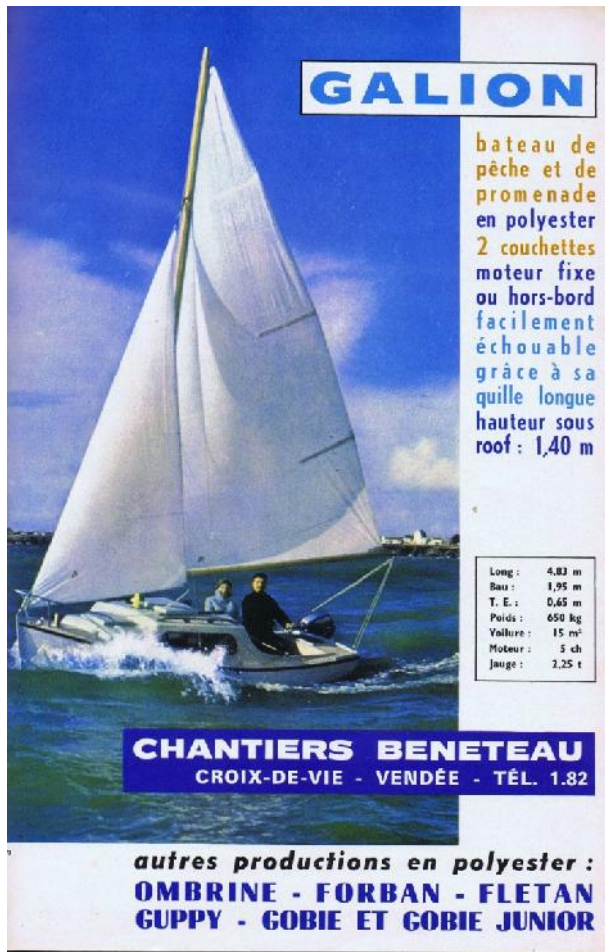
- German profile is the same as in France (56 years old and over)
- Boatbuilders & architects have followed the boat market:

1970	2010
Good sailing	Easy to handle
Strong Boat	Comfort
Deep Cockpit	Large Saloon
Small Hatched	Space & light
Storm Jib	Bimini

- This transformation has been even more spectacular for the catamarans

1970 – 2010 : Monohulls

1967



GALION

bateau de pêche et de promenade en polyester
2 couchettes
moteur fixe ou hors-bord
facilement échouable
grâce à sa quille longue
hauteur sous roof : 1,40 m

Long :	4,83 m
Bau :	1,95 m
T. E. :	0,65 m
Poids :	650 kg
Valeur :	15 m ²
Moteur :	5 ch
Jauge :	2,25 t

CHANTIERS BENETEAU
CROIX-DE-VIE - VENDÉE - TÉL. 1.82

autres productions en polyester :
OMBRINE - FORBAN - FLETAN
GUPPY - GOBIE ET GOBIE JUNIOR

2013

Bénéteau Sense 50



1970 – 2010 : Cruising Cats

1967



2013

Leopard 58



Current Situation

- Marinas are full of boats
- Owners are getting older
- For the crew, the economic environment has changed
- Becoming an owner is no more a quest
- Customers want everything, here and now
- Decrease of popularity for sailing, maybe for boating in general

A loss of popularity in Western Europe

- **UK** (British Marine Watersport & Leisure Participation report 2011):
 - 5,9% of the population took part in at least one of the core boating activities in 2012 (vs 8,2% in 2002)
 - 6,5% of the 35-54 years old people have participated in at least one boating activity (lowest rate ever)
 - Casual participants rate (less than 5 times a year) = + 1,8%
 - Enthusiastic participant rate (more than 13 times a year) = -1,9%
- **Germany:**
 - App. 500 000 boaters in 2008
 - Decrease by 8 000 people every year since then
- **France** (FFV – French Sailing Federation):
 - Number of licences is stable since 2011, but sailing holiday courses has slightly increased.
 - « The key objective would be to find the right support to give the opportunity to people to continue sailing when they are in active life » according to Olivier Clermont (Communication Manager at the FFV)
- New generation are not really interested in owning an object
- They want to enjoy the activity that the object has been made for
- They want to learn as fast as possible
- They have multiple hobbies or passions

Enthusiasm in emerging countries

- Global activity is shifting to the East
 - Within the next 30 years, the economic centre of gravity would have moved toward a position between India and China, estimates Prof. Danny Quah (LSE), when it was situated in the mid Atlantic in 1980.
- France exports more than 67% of its boat production and emerging markets represent a growing share of the exports in 2010/2011 (vs. 63% the previous year)
- On the charter side, some new clients coming from Eastern Europe (Russia, Poland)
- Israel, Turkey and India are also developing well
- Those new clients will of course have different expectations than the « historical » clients

Enthusiasm for Power Boating

- Leading the market
- Keeps growing even in these difficult times
- Difference with sailing is impressive today

Yachts sold in 2011	Power	Sail
USA	142 830	4 600
France	12 700	4 520

Source : Fédération des Industries Nautiques (France) & ICOMIA 2011 report (USA)

- Reason for success:
 - Easier access
 - You don't go out in bad weather
 - You can move quickly
 - More creativity in design & handling (dock & go)
- Fuel can be an issue:
 - Architects and builders are working on optimising the hull and engine to limit fuel consumption and improve energy efficiency

New Enthusiasm for Group Sailing

- In the 1970s the dream was to sail on your own with your crew or family
- In the next decade it will be to sail together with a group of friends: flotillas, challenges, owner's meetings, rallies, ...
- The aim is not only to see what is inside your boat, but also outside, to exchange, communicate, have fun and party
- Sailing with a group of yachts, with a group leader
- Language barriers are lower than in the past
- Information about the content has been improved

Sunsail Flotillas

- Sunsail proposes 31 Flotilla programmes:
 - 23 in the Mediterranean Sea
 - 8 in the Caribbean & Exotic destinations

SUNSAIL FLOTILLAS			
Overall	LY Number	Crew	Turnover €
Med Flotilla	2 972	14 265	8 394 000
Caribbean Flotilla	698	3 350	2 614 149
Overall	3 670	17 615	11 008 149

- Used to be a very UK centric product
- Initially created for beginner sailors
- Smaller boats, smaller budget
- Other markets are starting to grow up (Netherlands, France, Germany, ...)
- Sunsail Flotilla offers 3 different competence levels:
 - Level 0 (Gocek) to Level 3 (Solent)
- Comfort of the assistance, freedom during the day, security, conviviality
- 50% repeaters in 2012 vs. 45% repeaters for bareboat charter in the UK



The Yacht Week

- *“Affordable luxury combined with great people from all over the world and unforgettable events are what makes us unique. Every day is exceptional. Every night is magical. Crystal clear water, fresh winds, regattas and yacht parties will make the experience”*
- The success story of the Yacht Week is to have been able to address the Facebook generation
- The Yacht Weekers are coming from all over the world (20 countries)
- They are not crazy about sailing
- They are looking for fun: sunbathing, swimming, cycling and partying
- Most of them don't even know how to sail a boat and take a skipper

The Yacht Week

YACHT WEEK FIGURES		
Overall	Crew	Price/person
Year 2006	250	
Year 2012	8 000	
Year 2013	10 000	500 €

- Erik Biörhlund (Yacht week creator) knows that one reason of the success of the Yacht Week is the quality of the organisation, and the atmosphere which arises from it
- To develop the scale of the Yacht Week, he has developed its own skipper course



The Yacht Week



Owner's Rendez-Vous

- Not new, but it is no more restricted to the owners of old riggings
- Boatbuilders are organising an Owner's Rendez-Vous to:
 - Introduce the latest models
 - Create emulation with the brand
 - Invite the owners to be part of a club
- Example of the Lagoon Escapade for the French owners:
 - Started in spring 2009, the number of participants has increased over the last 3 years
 - Lagoon : From 12 to 21 boats
 - CNB : From 7 to 16 boats



Water Sports

- Julbo Swell Sessions
- The dream is not to charter a catamaran in French Polynesia
- The dream for the rider is to be on a catamaran because you then have the possibility to join the action and live multiple passions : kite surfing, paddle boarding, diving
- Being actor and spectator at the same time



Enthusiasm about boating

- To these 4 examples, we could add plenty of other events
- All of them are working around the same idea of bringing together people who have something in common, rather than dreaming about it
- Even with the current decline, there are bright spots to be found and reasons to remain optimistic in the longer term
- The most important is the continued appeal and spread of the boating lifestyle to millions of enthusiasts across the world

Enthusiasm about boating

Thank you for your attention

Any questions?

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