

DO WE CARE ABOUT BOATING?

The Who, What, How and Why of Growing Boating!



Outline

- BoatU.S. and BoatU.S. Foundation
 - Trends Impacting Recreational Boating
 - Efforts to Attract New Boaters
 - Efforts to Retain Current Boaters
-
- Trends in Boating Safety and Clean Boating
 - Efforts to Improve Boating Safety and Clean Boating

Who Is BoatU.S.?

BoatUS makes boating better. We proudly provide a single source of exceptional service and savings for boaters, including marine insurance and towing. We remain dedicated to educating and protecting boaters and their rights - making boating safer, more affordable and accessible.

500,000+

OVER HALF A
MILLION
MEMBERS

600+

TOWBOATS AT
OVER 300
PORTS

1966

SERVING
BOATERS SINCE
1966

Who Is BoatU.S. Foundation?

The BoatUS Foundation for Boating Safety and Clean Water is a national nonprofit organization promoting safe, clean and responsible boating. We provides educational outreach directly to boaters and supports partner organizations nationwide. With millions of boaters on the water, our aim is to reduce accidents and fatalities, increase stewardship of our waterways and keep boating a safe and enjoyable pastime.

**1.2
Million+**

BOATERS
EDUCATED WITH
ONLINE COURSE

550+

LIFE JACKET
LOANER SITES

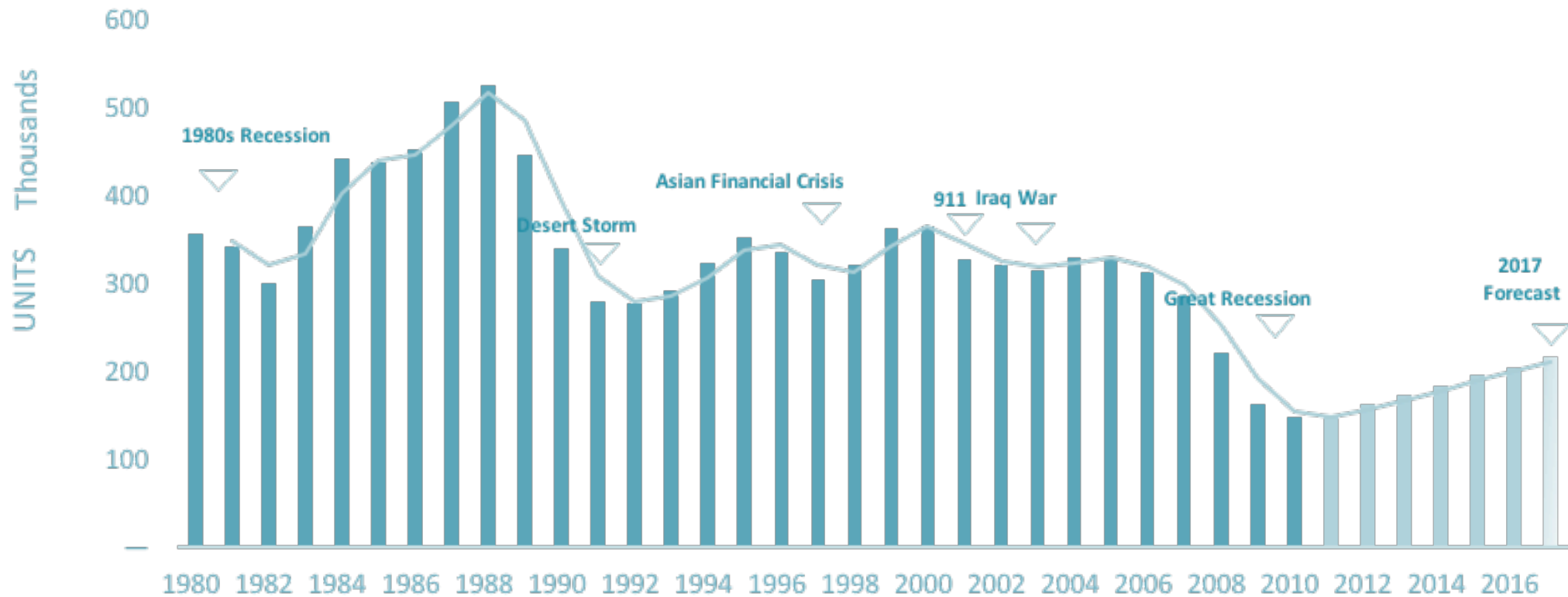
6,000

FISHING LINE
RECYCLING BINS

TRENDS IMPACTING RECREATIONAL BOATING

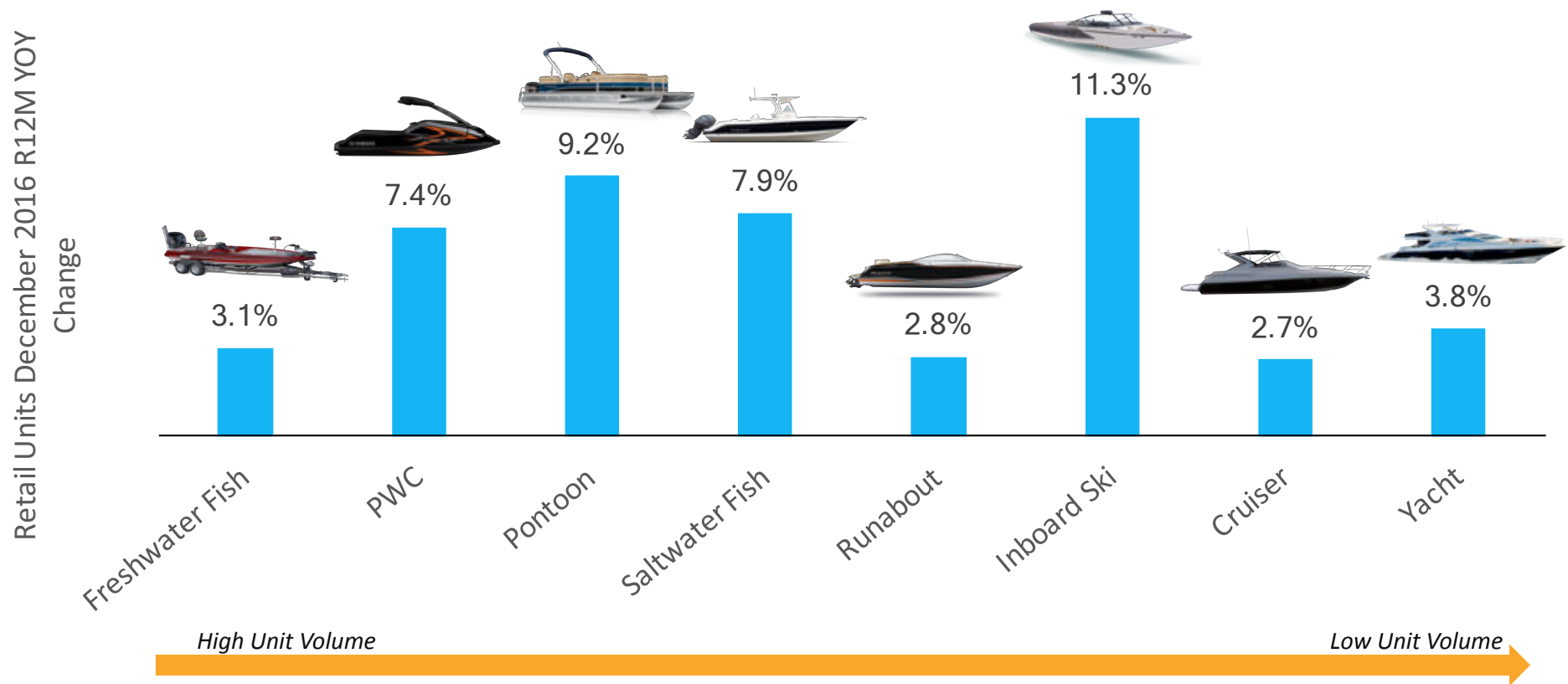


Traditional Powerboat Retail Sales



source: Info-link

Growth In 2016



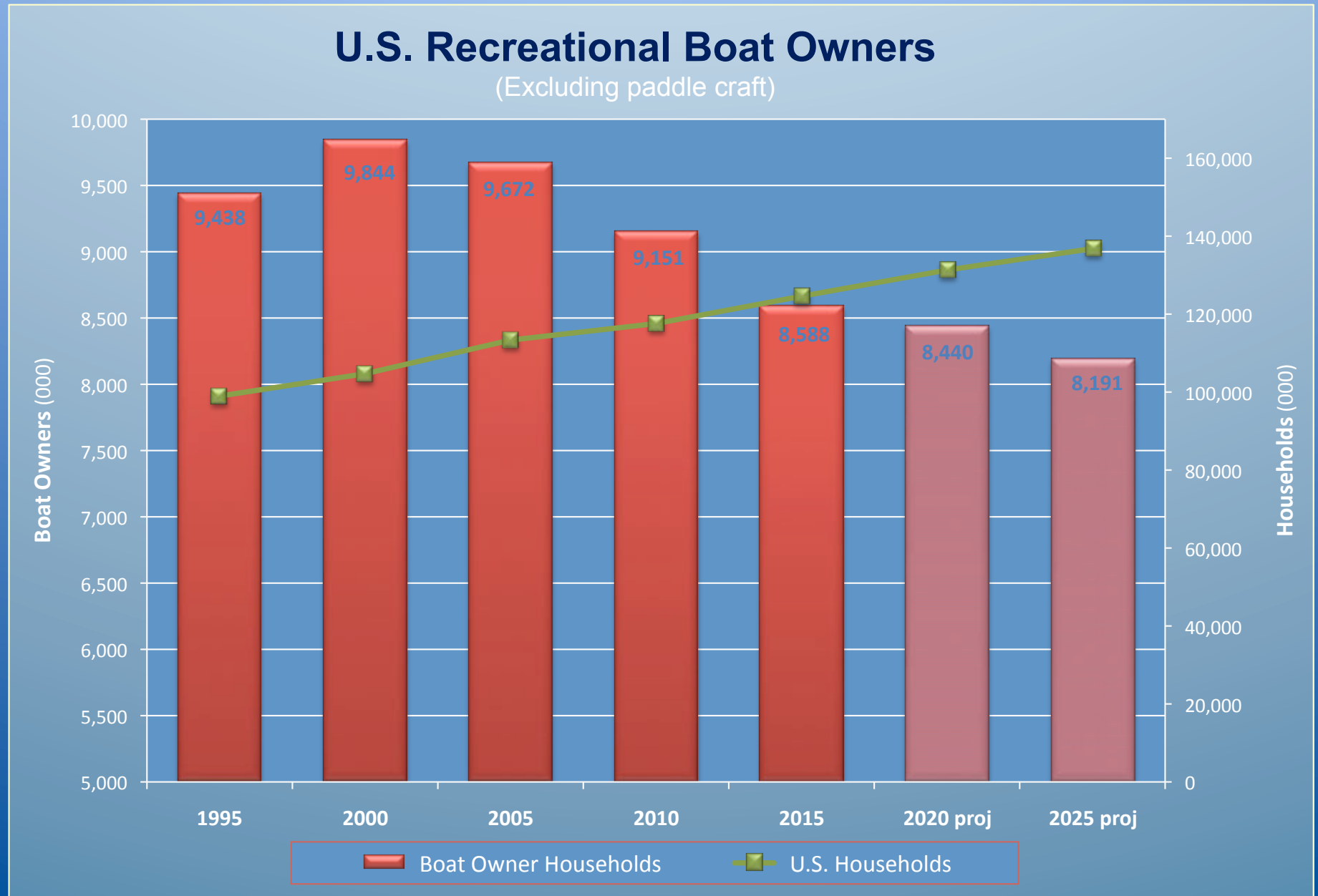
source: Info-link



Industry Headwinds



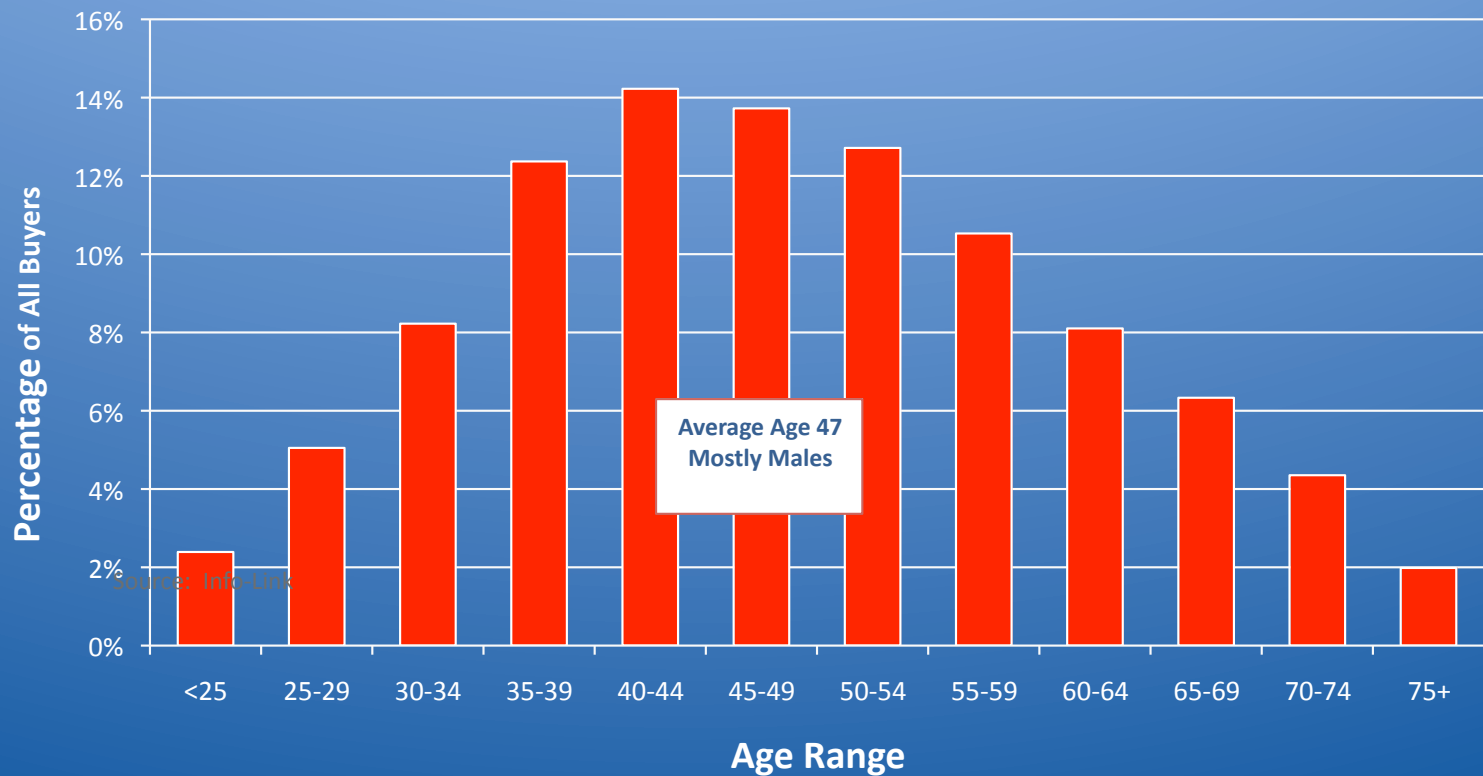
Household Stats



Boater Demographics - 1997

The primary factor influencing the future growth of boating is that our most loyal, core market is aging

Boat Owner Age Distribution - 1997

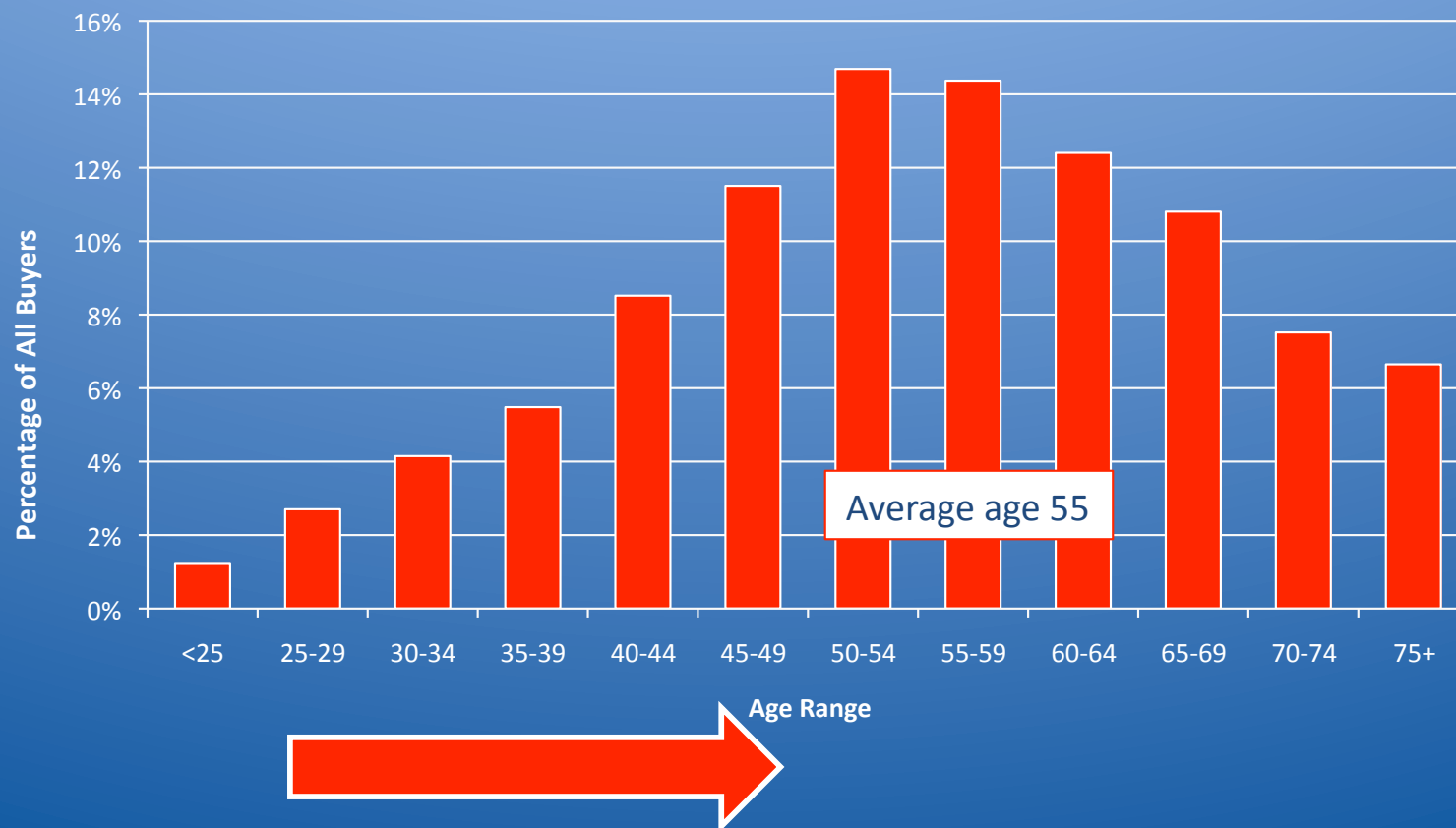


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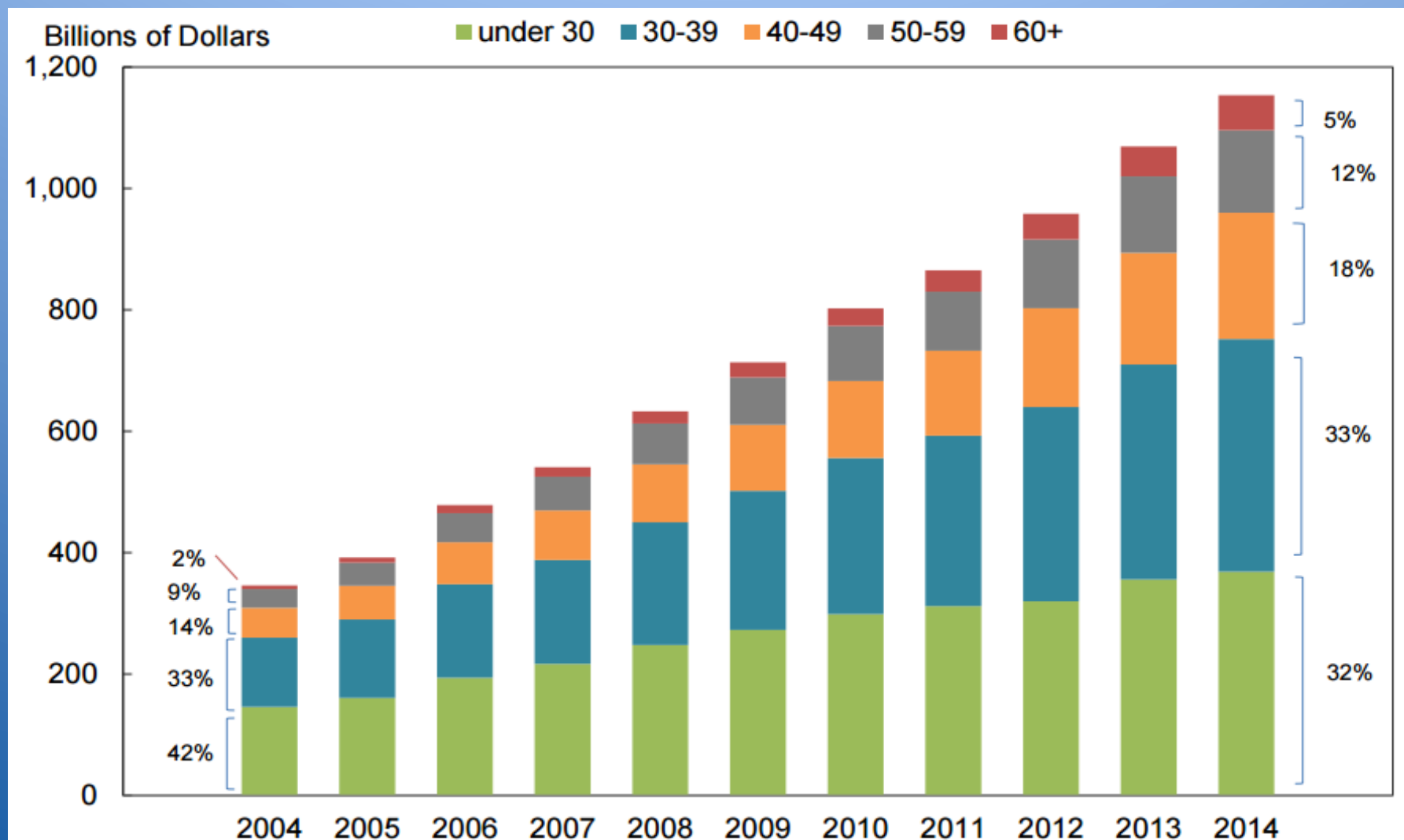
Boater Demographics - 2017

Every year the average age of a boat owner has increased by half a year. We need to fill in the pipeline.

Boat Owner Age Distribution – 20 years later

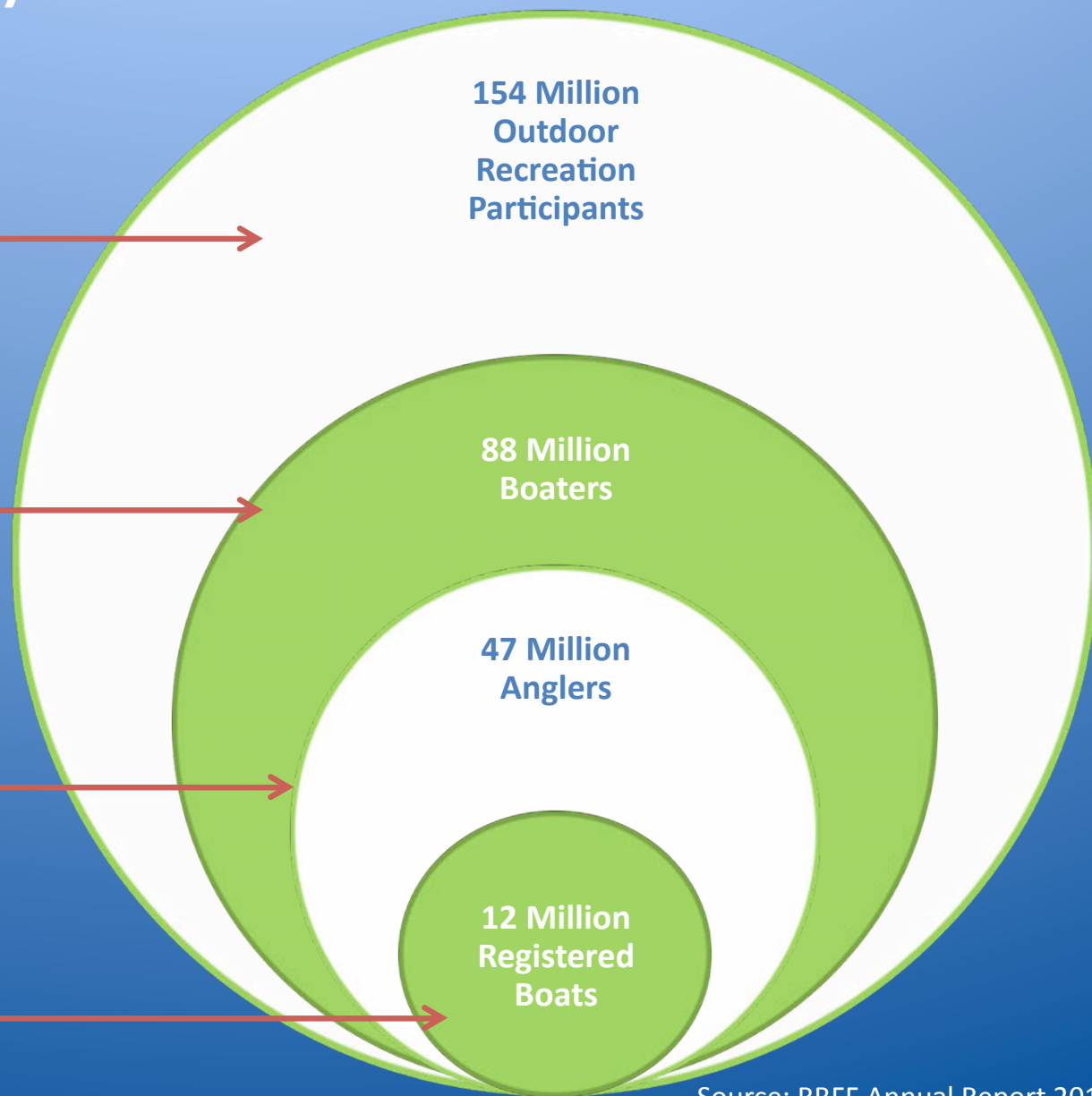
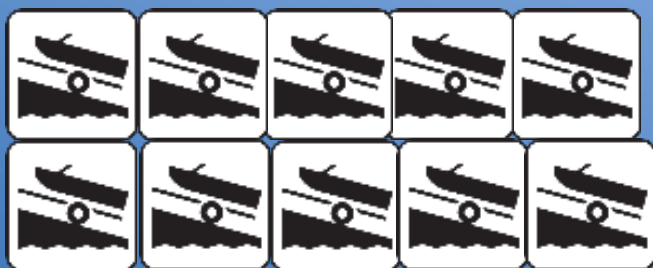
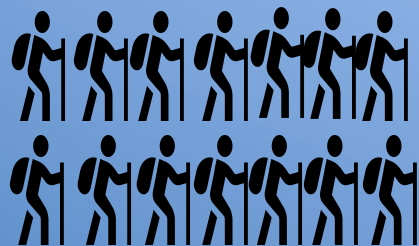


Rising Student Debt



EFFORTS TO RECRUIT NEW BOATERS

Opportunity



Source: RBFF Annual Report 2016
*NMMA Abstract 2014



To introduce new people to
boating and to advance their
exploration of ownership.



We sell the “ing”



Digital Advertising

Video Advertising



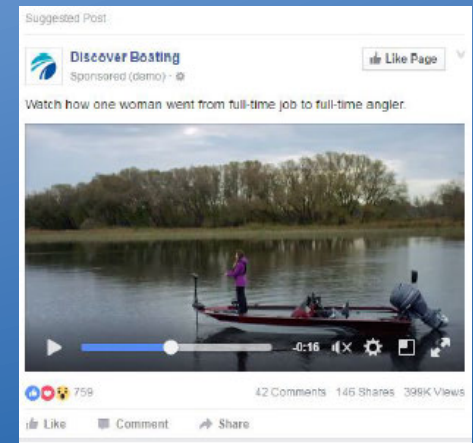
Banner Display



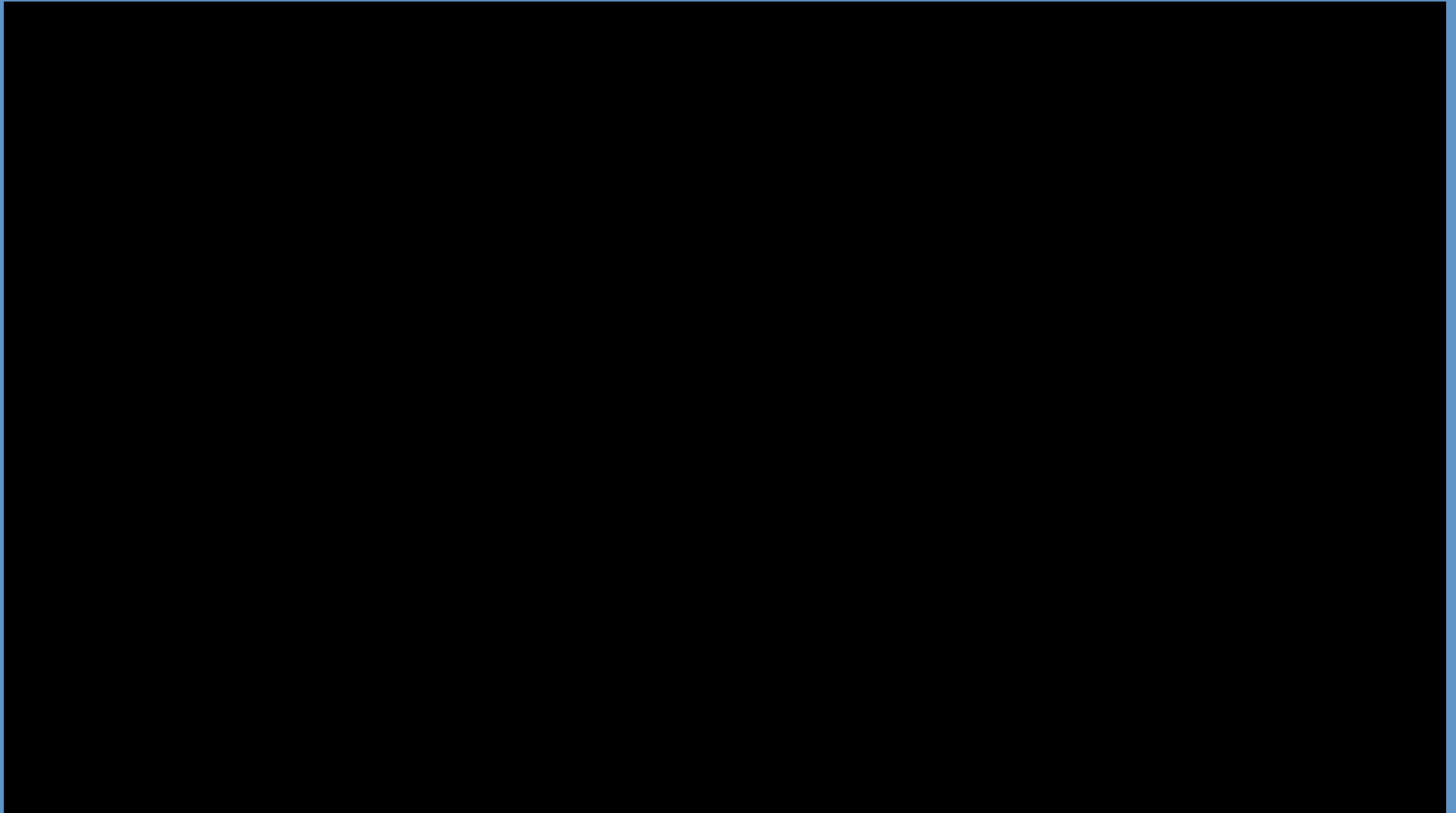
Search

Looking For A Fishing Boat? - Find The Perfect One Here
www.discoverboating.com/fishing
Explore fishing boat types, brands, and options with the fishing boat selector.
Highlights: Simple, Powered By Outboard Motors, Car-Topped Or Trailered...
Boat Brands & Manufacturers: Discover Boating

Social Media Advertising



Brand Anthem



Drove positive national coverage to put boating top of mind coast to coast.

Through ongoing media outreach and MAT release distribution we secured boating stories in top-tier national online, print and broadcast media.

USA TODAY **SFGATE**

Smithsonian.com

Los Angeles Times

1,174 placements
+
112 million impressions

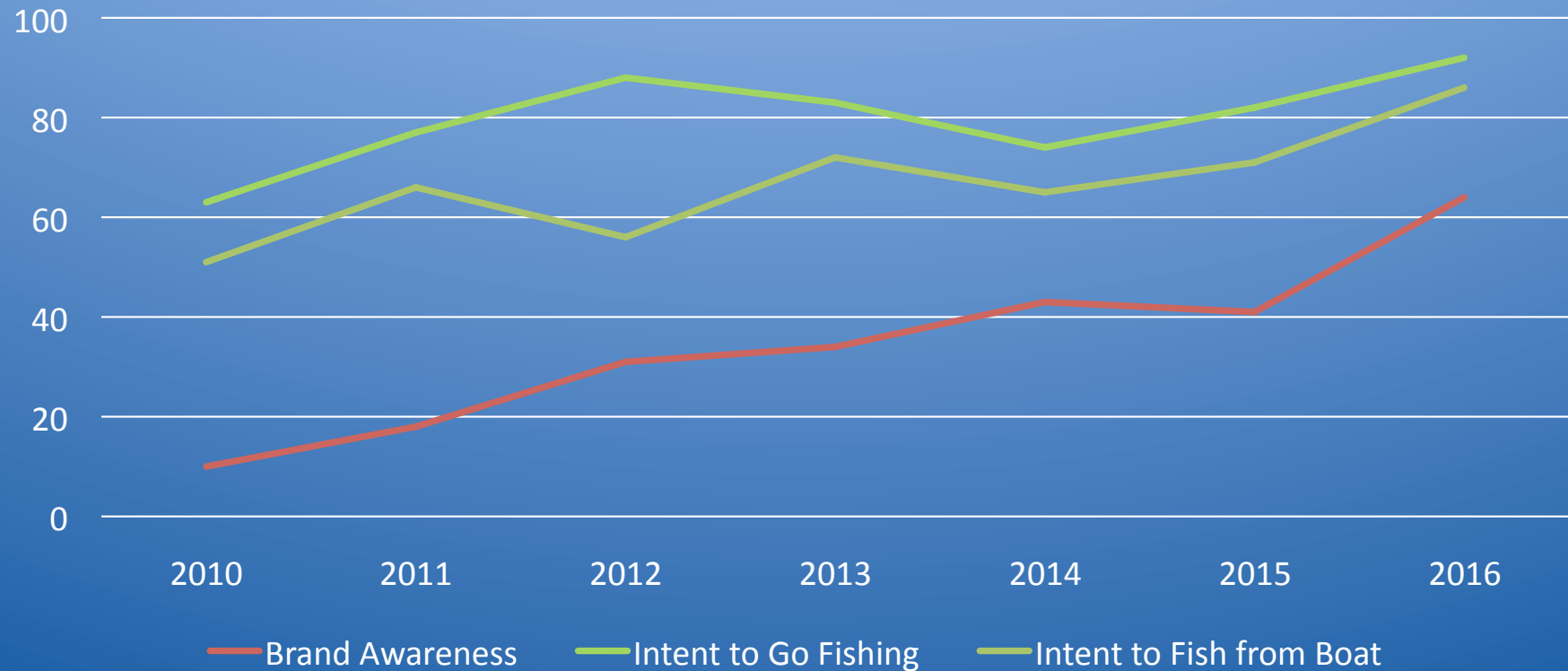
FOX NEWS LIVE **ON THE WATER** **FOX & friends**
GET OUT ON A BOAT WITH FAMILY & FRIENDS

Hispanic Outreach



Take Me Fishing - Campaign Evaluation

Overall Stated Intentions by Survey Year

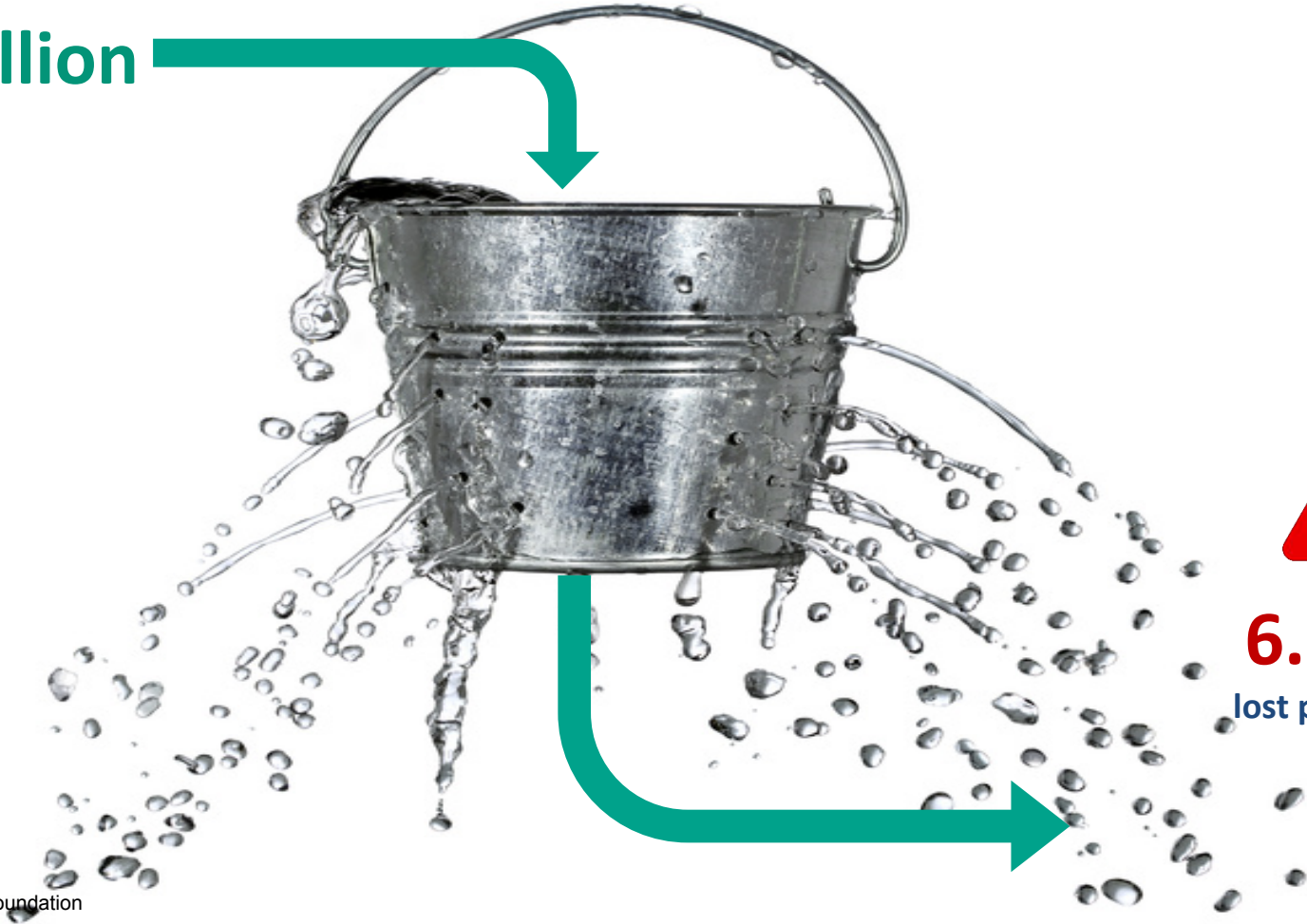


EFFORTS TO RETAIN AND REACTIVATE BOATERS



Leaky Bucket

6.1 million



6.5 million

lost participants in 2015

Source: RBFF/Outdoor Foundation

Angler R3 Recommendations



Recommendations and Strategic Tools for Effective Angler Recruitment, Retention and Reactivation (R3) Efforts

A work product of the
partnership between the
Aquatic Resources
Education Association
and the
Recreational Boating &
Fishing Foundation

November 2016

Photo Courtesy of Take Me Fishing



First-Time Buyers Retention Email Campaign Toolkit

RECREATIONAL
BOATING & FISHING
FOUNDATION

 TAKEMEFISHING.org

 VAMOSAPESCAR.org

Angler R3 National Advisory Group

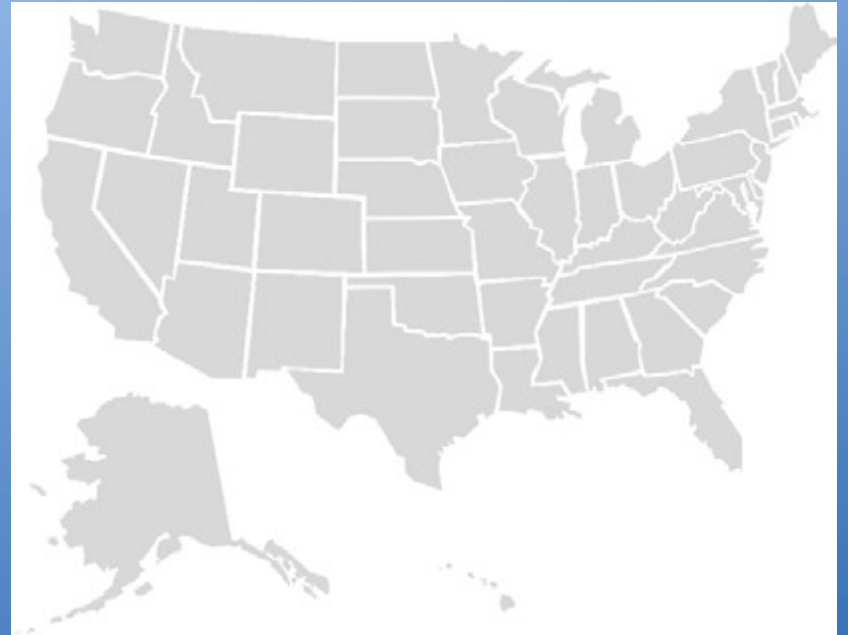


15 individuals representing:

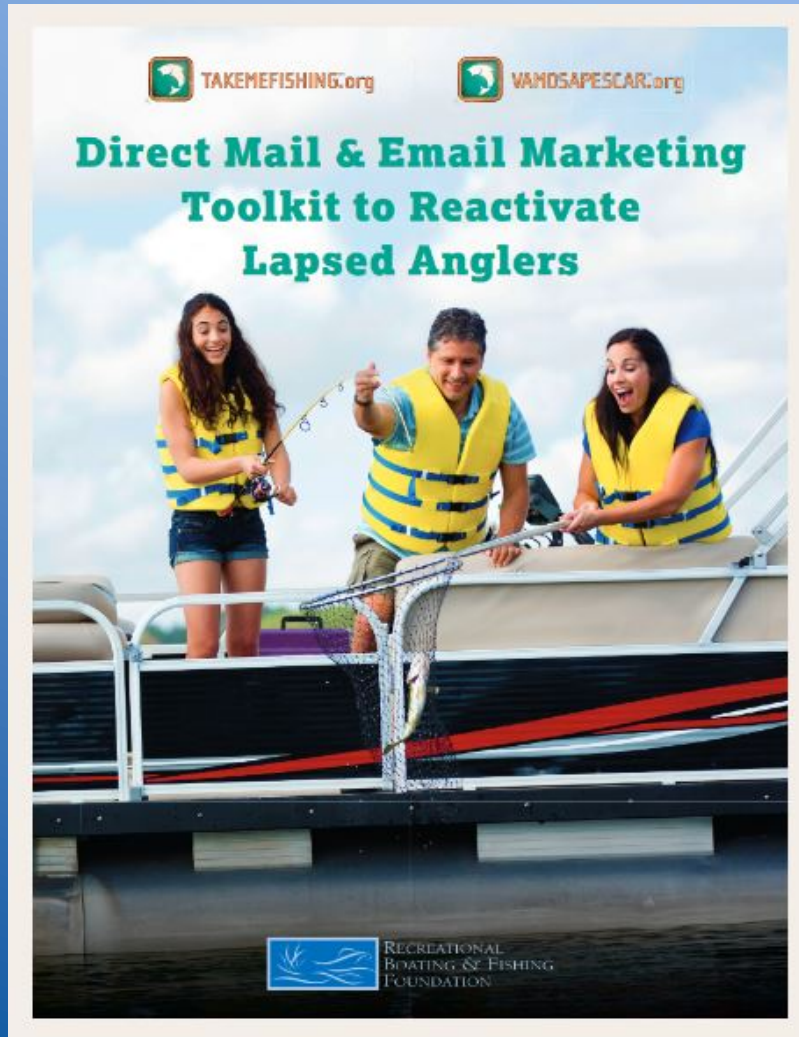
- State fish and wildlife agencies
- Federal agencies
- Fishing and boating industry
- NGOs

Next Steps

- *Advisory Group Conference Calls*
- *State Angler R3 Effort Survey*
- *Develop National R3 "Checklists"*



Lapsed Angler Marketing Toolkit



Spring fishing is here! | Email not displaying correctly? [View it](#) in your browser.




IT'S TIME TO RENEW YOUR FISHING LICENSE.

Invest in a favorite pastime while helping to conserve {State}'s waterways.

Thank you for your past support of {State}'s natural resources. Your license renewal does more than grant you the freedom to fish the state's many beautiful lakes, rivers, and streams. 100% of your fishing license fees are invested back into state wildlife agencies to ensure healthy fish populations and public access to fishing opportunities in {State}.

Where to renew your license:

- {State URL}
- Or call {State's phone number}
- Or in person at your nearest {State location} or license agent.




TAKEMEFISHING.org VAHOSAPESCAR.org

Boat Registration Marketing Program

\$1.92 M
gross
program
revenue

Your boat registration expired for the boat shown below.

 **Fee Due: \$27.00**

Boat No.	Make	Year	Length
9610 BN	CARIB	2000	9-0

Renew now to receive your new registration.

PRBFF
500 Montgomery St Ste 300
Alexandria, VA 22314-1857

Department of Game and Inland Fisheries
Boat Section Renewal
PO Box 11528
Richmond, VA 23230

PLEASE DETACH THIS SLIP AND RETURN WITH PAYMENT



Change of address? Sold your boat? Please see reverse side of this form.

**THE FISH ARE IN THE WATER.
SHOULDN'T YOU BE IN YOUR BOAT?**

3 Easy Ways to renew your boat registration...

1. Renew online: Go to <http://www.dgif.virginia.gov/boating/> and follow the instructions. While you're there, you can also update your address.
2. Renew by mail: Return the remittance slip above along with a check or money order for the registration fee due in the enclosed envelope.
3. Renew in person: Visit the nearest Division of Motor Vehicles (DMV) or the VDGIF Richmond office at 4010 W. Broad St., Richmond, VA 23230.

Questions? Call the VDGIF at 1-877-828-BOAT or email boat-reg@dgif.virginia.gov.

Boat Registration Renewal Information for Your Records

BOAT NO.	MAKE	YEAR	LENGTH	FEE DUE
9610 BN	CARIB	2000	9-0	\$27.00

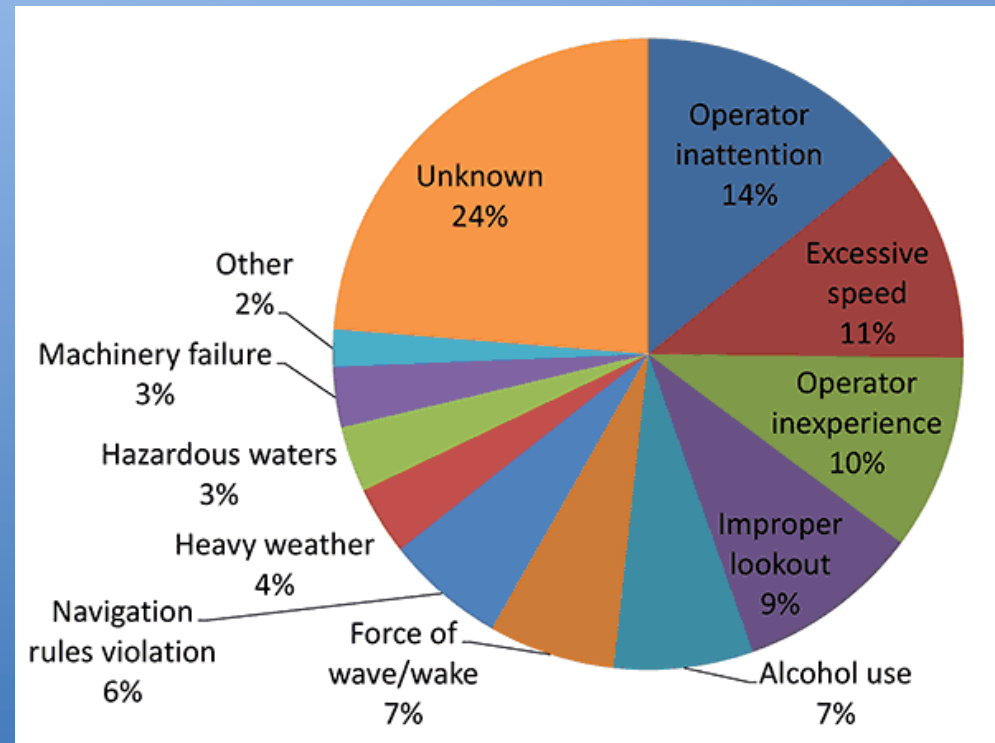
8019-22821-7-01-00

BOATING SAFETY UPDATES



Accident Contributing factors 2015

- Operator inattention
- Operator inexperience
- Improper lookout
- Machinery failure
- Excessive speed
- Alcohol use
- Hazardous waters
- Navigation rules violation
- Weather
- Force of wave/wake



Source: USCG Boating Accidents Report Database 2013

Boating Safety Education

Free Online Course



Specialized Courses

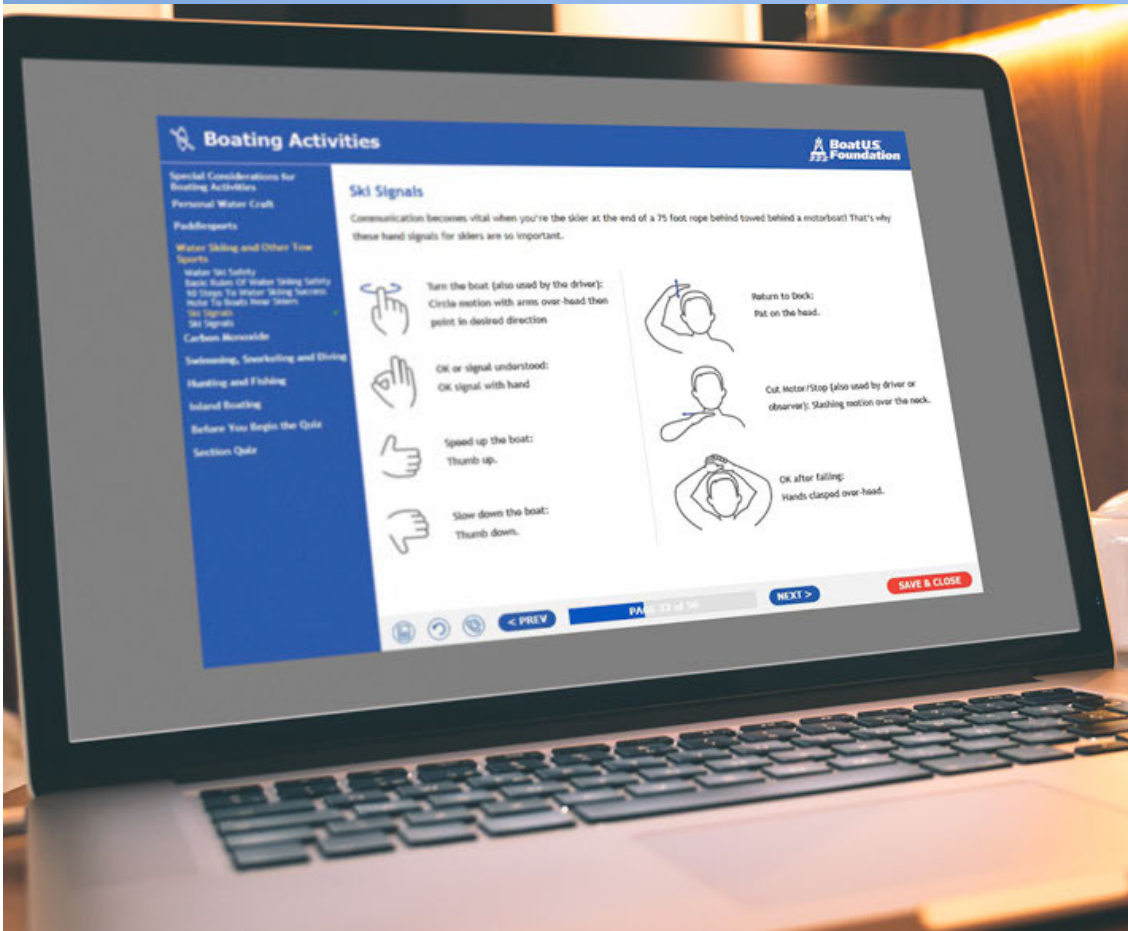
Weather
VHF Radio
Hurricane Prep
Navigation
Boating on Rivers Locks & Lakes
Learn to Sail
Sailing Lingo



Hands-on Training



Free Online Boating Course



Free Course – meets education requirements in 35 states (offered in 48 states)

Top 5 states: Florida, Virginia, Washington, Oregon, Texas. CA just approved!

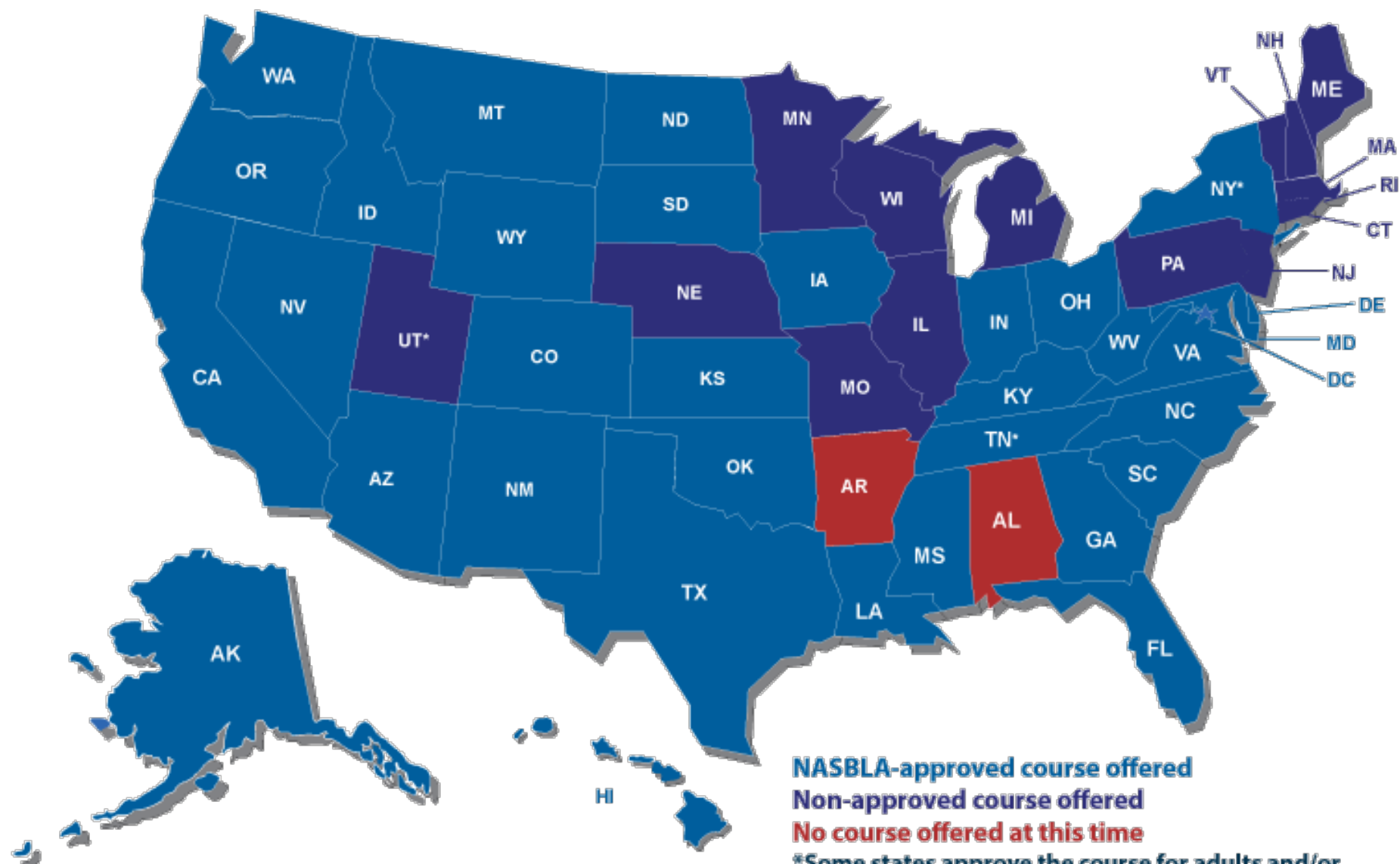
Minimum time to complete:
3 hours 30 minutes

Over 150,000 Students each year.



BoatU.S. Foundation

Online Boating Safety Course State Approvals



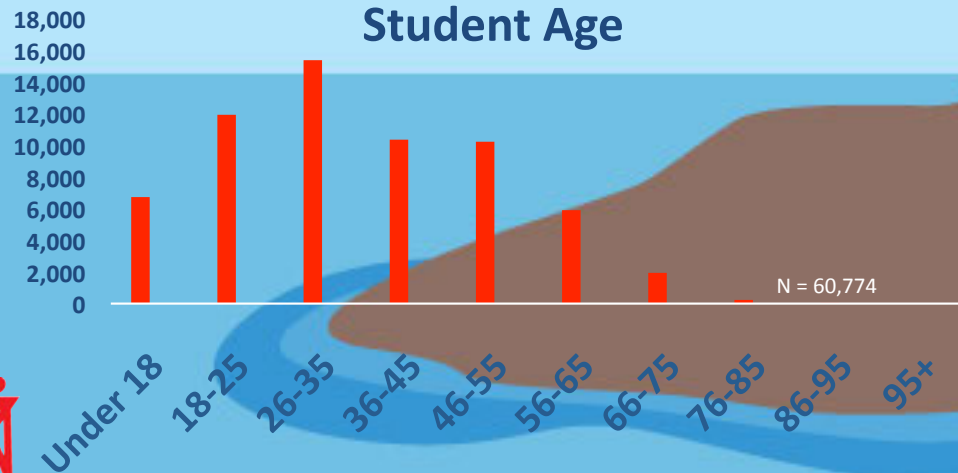
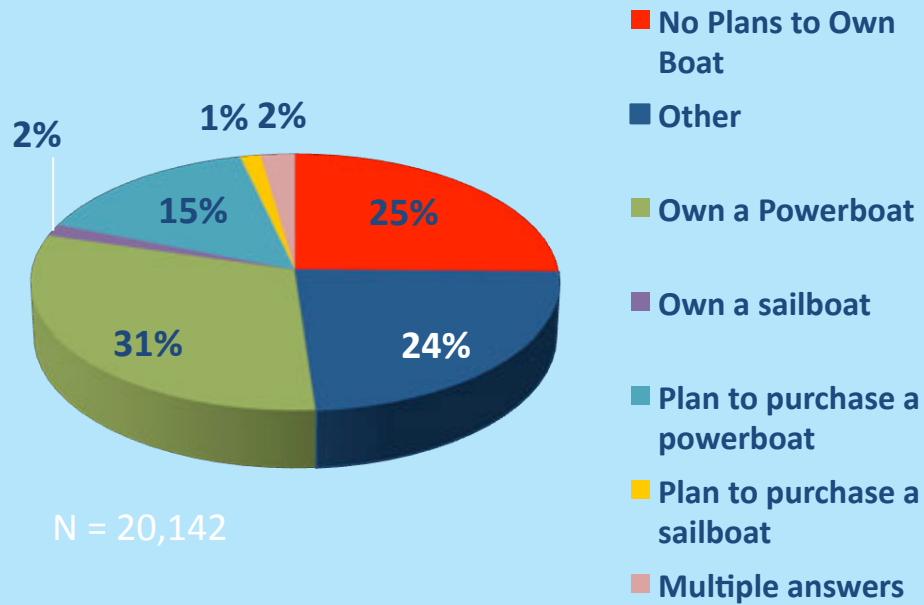
NASBLA-approved course offered

Non-approved course offered

No course offered at this time

*Some states approve the course for adults and/or powerboaters (i.e. not PWCs) only

Who are our students?



Source: 2015 Student completions from course registration

Specialized Courses

Suite of courses for more specific needs to continue the learning beyond the basic boating safety course.

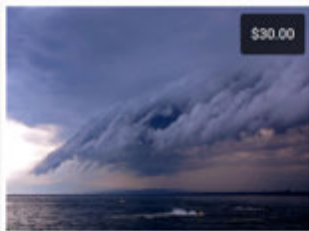
Created in partnership with other organizations.

Helps boaters get more in-depth knowledge



\$30.00

Boating On Rivers, Locks, and Lakes



\$30.00

Weather for Boaters



\$39.50

Learn to Sail



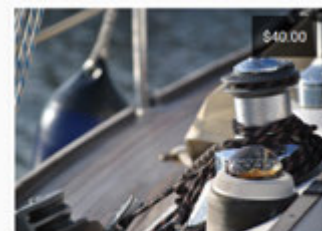
FREE

Free Boating Safety Course



\$30.00

How to Use GPS



\$40.00

Modern Marine Navigation



\$30.00

Partner in Command



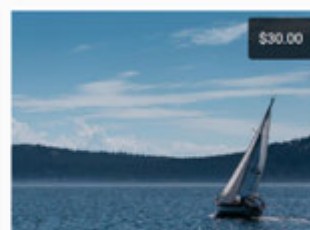
FREE

Clean Boating Course



FREE

Spill Prevention for Marina Staff



\$30.00

Planning Your Cruise



\$30.00

All About Marine Radio



\$30.00

Hurricane Preparation for Boaters

Hands-on Boater Education

What are the barriers to getting more people in boats?

Would a MSF model work for boating?

Can BoatU.S. help the industry overcome the hurdles to hands-on training?

- Conducted two focus groups
- Surveyed 3,300 GEICO associates
- Analyzed Discover Boating survey data
- Analyzed NMMA data
- Surveyed course takers at first pilot



Pilot #1 - Miami International Boat Show

- Partnered with Discover Boating
- 174 registered course takers for powerboat training
- 235 registered course takers for sailing courses
- 232 post-course surveys completed



Pilot #2-Freedom Boat Club-Sarasota, FL

- Partnering with Freedom boat club corporate location
- Two days of training
- Email marketing campaign to BUSF online course takers



West Coast Pilot Project

- We are looking for a pilot location in the NW
- Ideally, the location will have 3-6 powerboats
- Facilities to accommodate 30-60 students
- All logistics and marketing will be handled by BoatU.S.

CLEAN BOATING UPDATES



Clean Boating Trends

Increasing regulation and scrutiny

- Bottom paint regulations
- Pressure washing regulation
- Increased interest in No Discharge Zones
- Growing concerns over transport of Invasives



Uncertainty over federal funding for clean marina programs and other clean water programs, including Sea Grant.

Clean Boating Programs

Online Education

Marina Spill Prevention
Clean Boating Course



Marine Debris Efforts

Fishing line Recycling
Large Debris Removal
Commercial Fishing Gear
Interactions



Invasive Species

Preventing the Spread
Ensuring Boating Access
Preventing Damage from
Decontamination



For the Love of Boating



NMMA



RECREATIONAL
BOATING & FISHING
FOUNDATION



ABYC
Setting Standards for Safer Boating

 **BoatU.S.**

 **BoatU.S.
Foundation**

QUESTIONS?

