



Norwegian Boating Survey 2012

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Foreword

- The preparations for the survey started in august 2011
- Project staff: KNBF and NORBOAT(the industry)
- Fundings, in total NOK 1.000.000 split between 10 un-equal partners
- Contract signed late in 2011
- Data collection conducted i january 2012
- Data owned by KNBF and NORBOAT
- Deliverance; analysis, booklet and main report. Computer Presentation(this one) and som verbal presentations
- Input information for foreigners; Norway have 5,0 million citizens

Projectgroup



Projectpartners



About the NBS 12

- Scope and references
 - The Swedish Boating Survey 2010 (and 2004) used as template
 - The Task; To describe the Norwegian pleasure craft market:
 - Canoes/kayaks
 - Dinghys, rowing boats without engine
 - Motorboats w/wo sleepover facilities
 - Sailboats mw/wo sleepover facilities
 - Secondary; try to compare Norwegian data with the Swedish surveys(2004-2010)
- Comprehensive study
 - 4652 Norwegian households participated, interviewed primarily by telephone
 - *"...the person in the household between 18 and 74 years who has the responsibility for the households pleasure craft."*
 - From above, 1141 households who owns one or more boats were interviewed(30mins).
 - Covers the whole country, overweight in regions with more boats.
 - Statisticly weighted afterwards to represent the whole population.



Participation

Boat facts

Economical
importance

The usage
of boats

Safety at sea



Every second Norwegian was on board a pleasure craft during 2011.

The coast is a very important resource for public health!



There are 752.000 recreational crafts in Norway!



Economical
importance

Boaters spend more than NOK 6,25 billion, equals € 0,8 billion, every year



The usage
of boats

Every boat is used 34 times pr year.

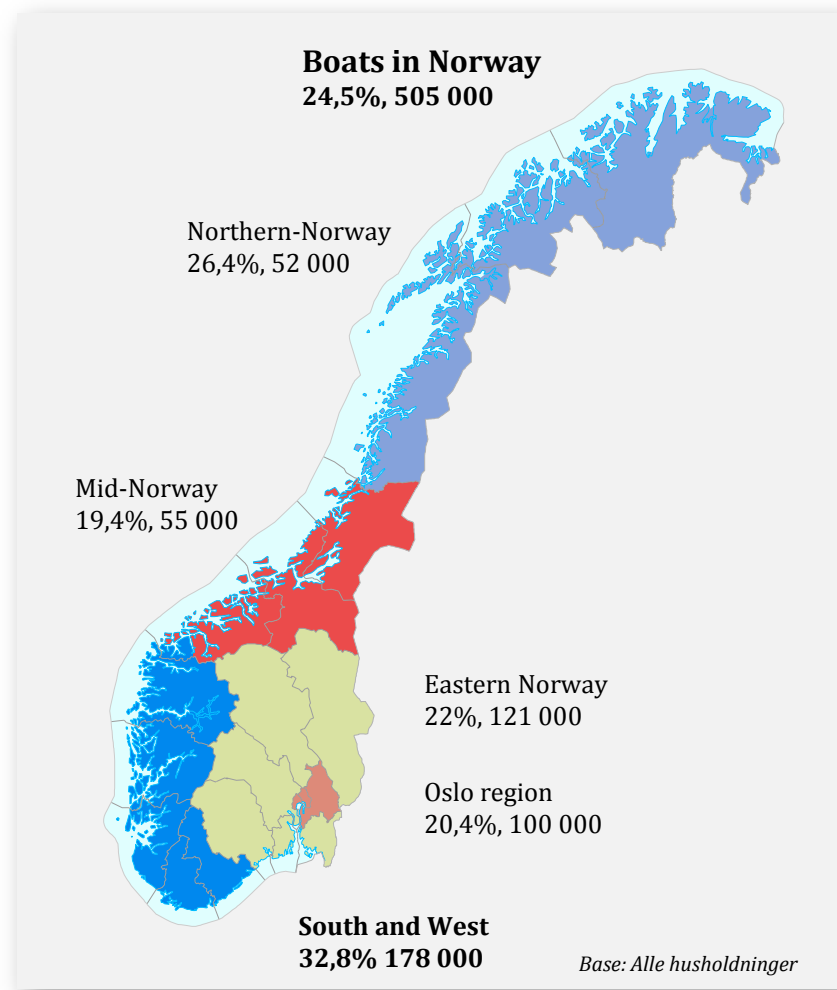


50% of the boat skippers does not have any formal competence, but are positive to reasonable regulations



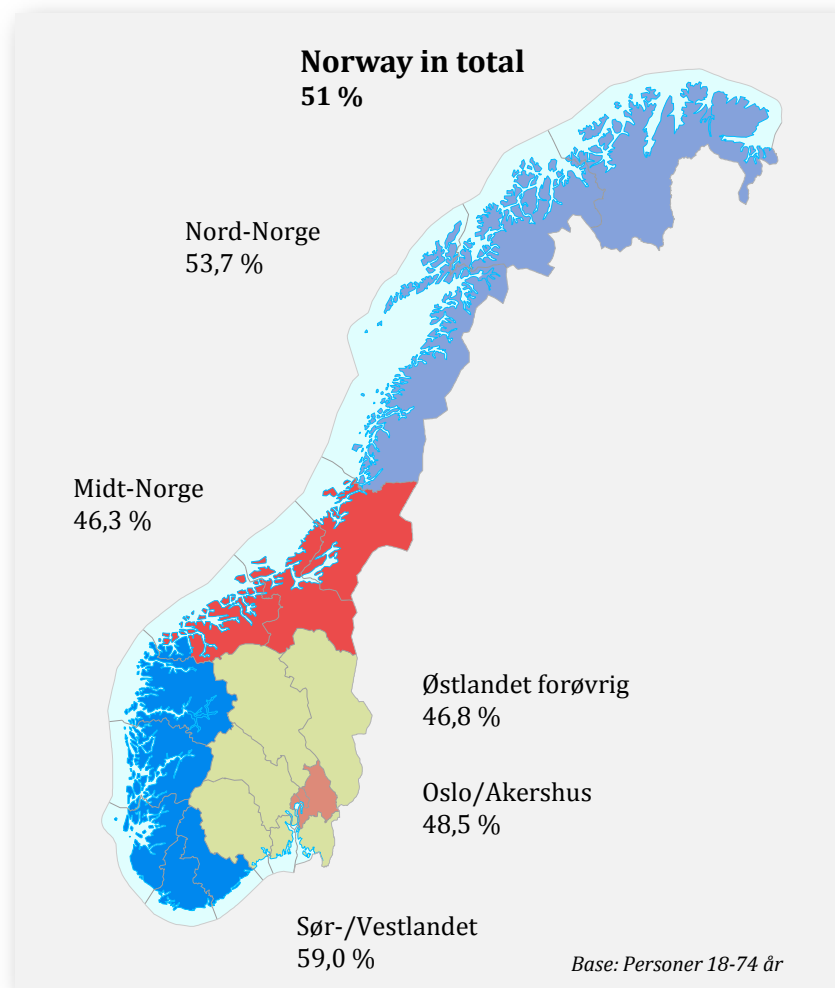
Every 4th household own a boat

- More than 100 000 km coastline, a spectacular base for boating
- Every 4th household own a boat
 - Aprox 505 000 households
 - Largest density on the westcoast, where every 3rd household have a boat
- Major reason for **not** having a boat
 - Other priorities/interests (34%)
 - Not interested, (33%)
 - Too expensive (25%)



50% of the population has been at sea in a pleasure craft in 2011!

- 51% of the population (18-74 years) has been on one or more boat trips in 2011
- Boats most used in northern Norway and in the south-west
- Which boats were used the most:
 - Sailboats 83 %
 - Motorboats w/sleepover fac. 80 %
 - Motorboats wo/ sleepover fac. 79 %
 - Small boats w/o engine 49 %



Membership in a boating organisation or yacht club

- 3 out of 10 households are members in a yacht club or a boating organisation

	Total
Local yacht club	64.7 %
Sailing yacht club	9.9 %
Canoe or kayak club	3.7 %
Other local outdoor organized activity	2.6 %
Member of the Rescue Society	48.7 %
Member of the Red Cross	6.7 %
Other organisation	7.0 %

Note: Multiple memberships possible

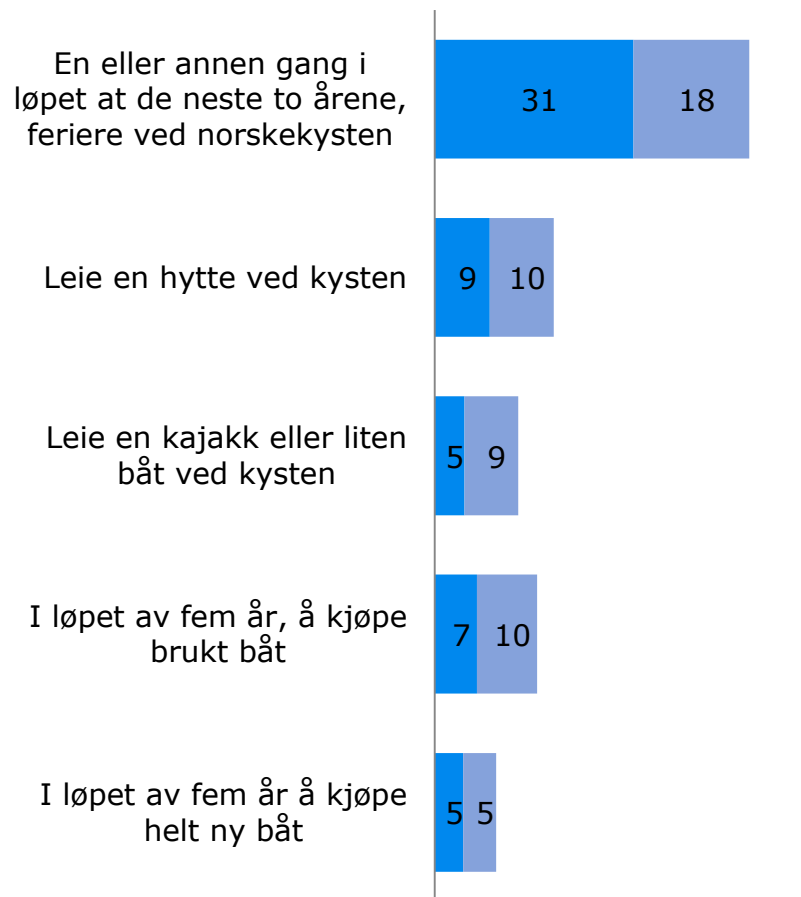
Base:

Husholdninger som er medlem

149 507

The Norwegian coast is a unique source for outdoor activities

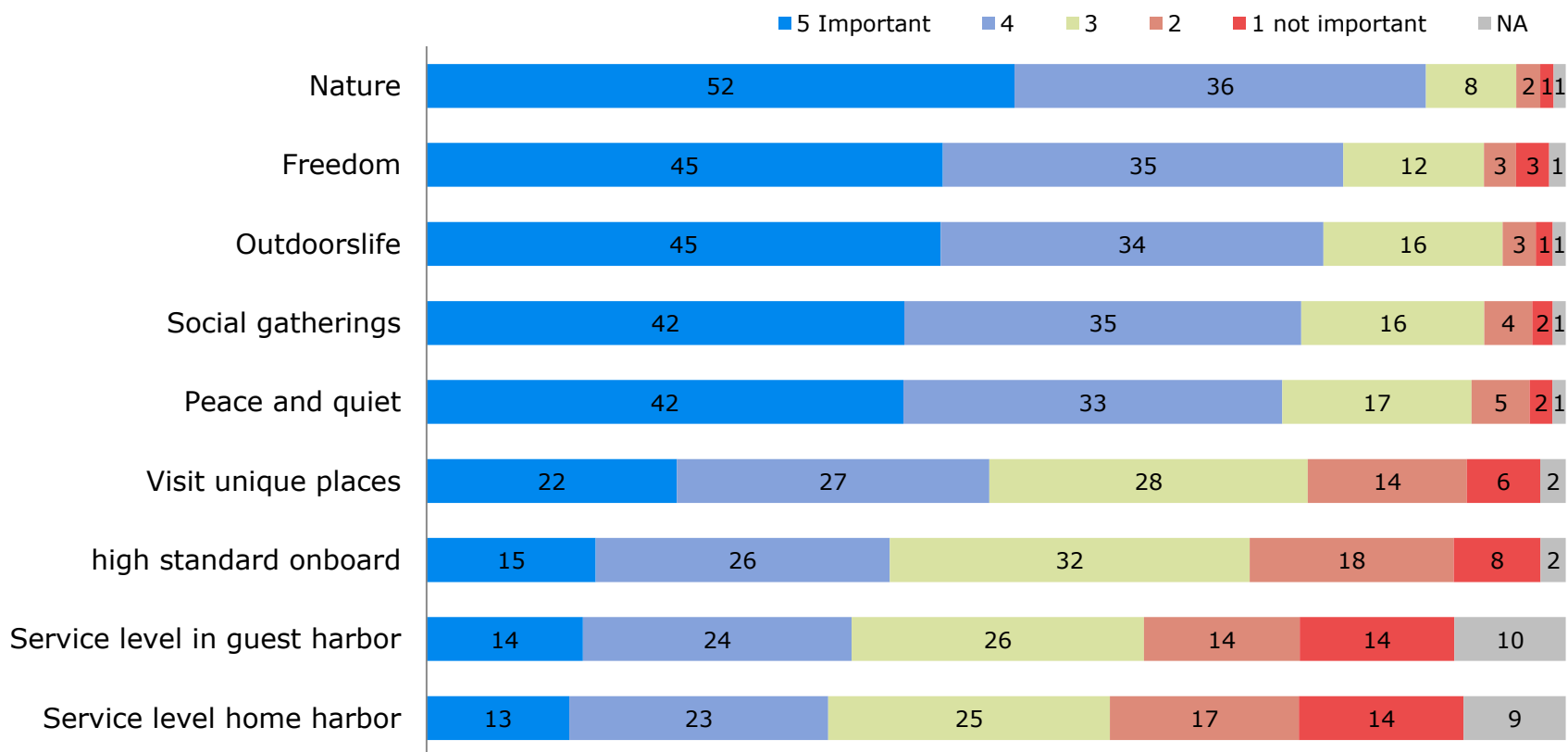
- 50% of the respondents are planning to spend their vacation by the Norwegian coast the next two years
- 1 out of 6 are thinking of buying a second hand boat the next 5 years
- Aprox 4,5 % says that they, most likely, will buy a new boat the next 5 years
- Market potential for aprox 90 000 new boats in Norway next 5 years!



Base: Alle husholdninger

Boating is fresh air, freedom, peace and relaxation?

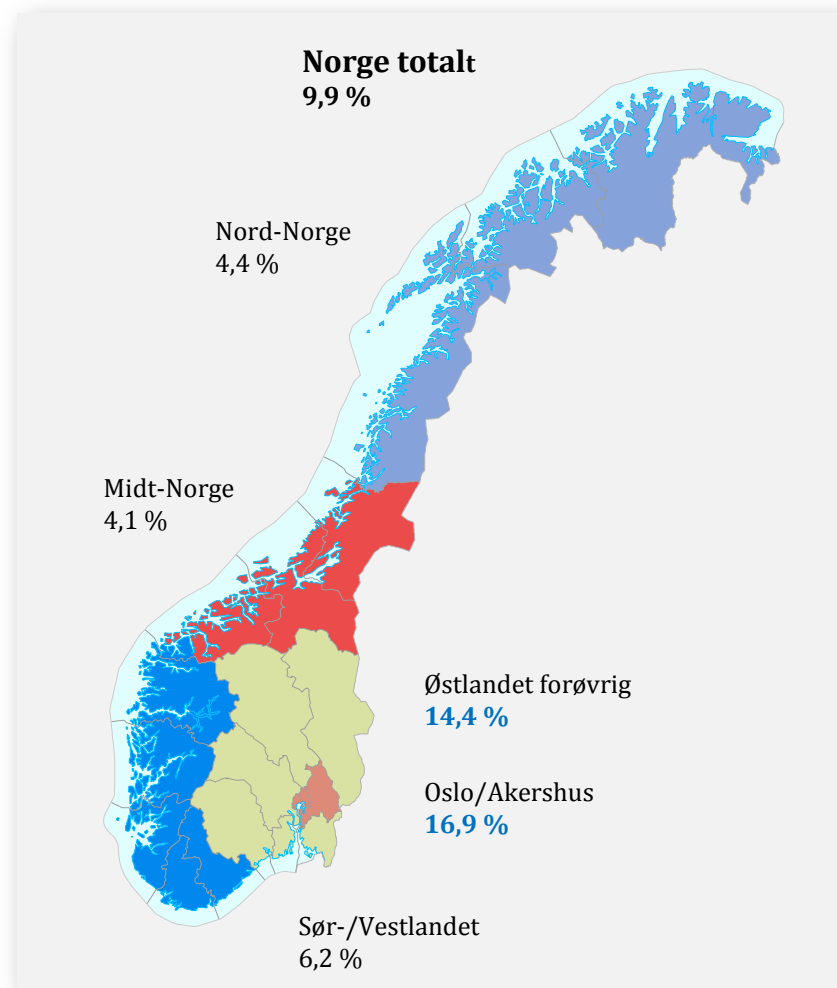
How important is ... when you are out in your boat?



Base: Alle som har vært på båttur i 2011, (halve befolkningen)

50/50 better/worse-answers regarding water quality

- Are there any **changes** in the water quality in your boating period?
 - 10%: Yes, to the better
 - 9%: Yes, more polluted
 - 74%: No difference
- Highest part of «better» answers in the highest populated areas
- **“Yes, better water quality”** shown in the map pr region



The survey also touch other environmental issues

- Just 4 % of the population think that boating have a major negative impact on the environment
- 18 % of the boats have a waste water suction adapter on deck
- 27 % of the households have a boat engine which is not in use.
 - 61 % are positive to an engine scrap deposit
- 10 % of the households own a boat which is considered scrapped
 - 52 % of these boats are between 9 -14 feet
 - 62 % made of GRP and 30% made of wood
- 70 % of the boaters never disturbed by noise of other boaters/engines
 - 2,4 % allways disturbed...
- 7 out of 10 boat owners says that boating has a positive impact on own general health
 - 5 out of 10 not-boat-owners says the same

Aprox . 750 000 pleasure crafts in Norway

- Motorboat without sleepover facilities the largest group
- 1 out of 4 are motorboats with sleepover facilities
- 3 out of 10 are 'small boats'
- Sailboats = 7 %
- Aprox 210 000 boats have sleepover facilities

«The term «pleasure craft» does not include surfboards, sailboards, personal watercraft and dinghies belonging to another boat»

	Number	Prosent
Total, small boats	232 341	30.9 %
Canoe/kayak	80 309	10.7 %
Dinghy, rowboat wo/engine	152 032	20.2 %
Motorboat without sleepover facilities	290 932	38.7 %
Motorboat with sleepover facilities	176 276	23.4 %
Total, sailboats	52 529	7.0 %
Sailboats without sleepover facilities	17 173	2.3 %
Sailboats with sleepover facilities	35 356	4.7 %
Base: Alle sjødyktige båter	752 079	100 %
<i>Feilmargin +/- 43 000 båter</i>		

Boat types pr region

Main boats in total, 4 groups:

- Small boats; **13,2 %**
- Motorboats, no sleepover fac.; **42,3 %**
- Motorboats, with sleepover fac.; **30,0 %**
- Sailboats; **5,5 %**

Liten båt; **11,3 %**

Motorbåt u/overnatting; **53,5 %**

Motorbåt m/overnatting; **23 %**

Seilbåter; **3,1 %**

Liten båt; **19,9 %**

Motorbåt u/overnatting; **38,6 %**

Motorbåt m/overnatting; **28,3 %**

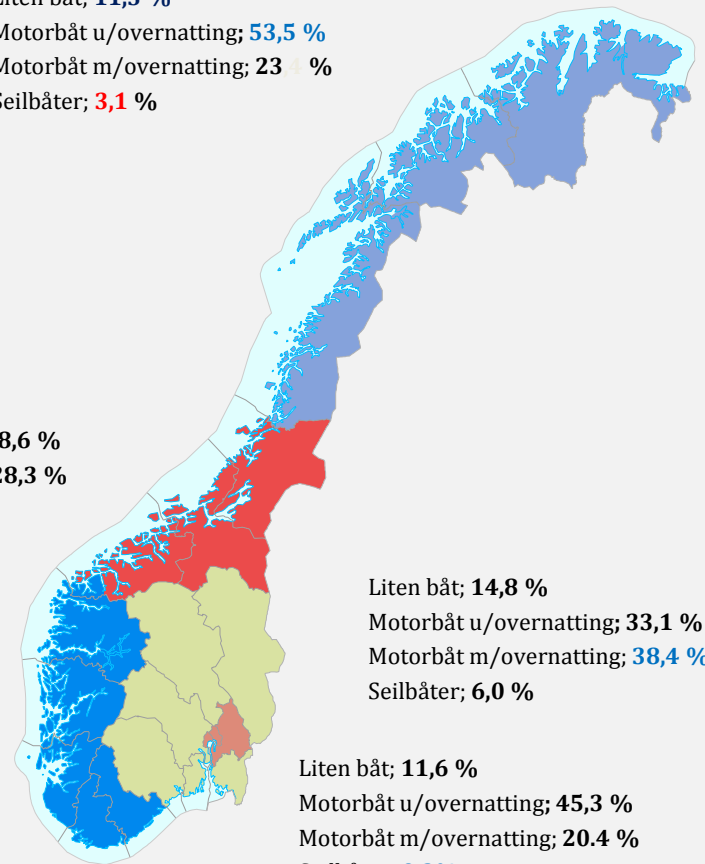
Seilbåter; **4,0 %**

Liten båt; **11,4 %**

Motorbåt u/overnatting; **44,6 %**

Motorbåt m/overnatting; **32,2 %**

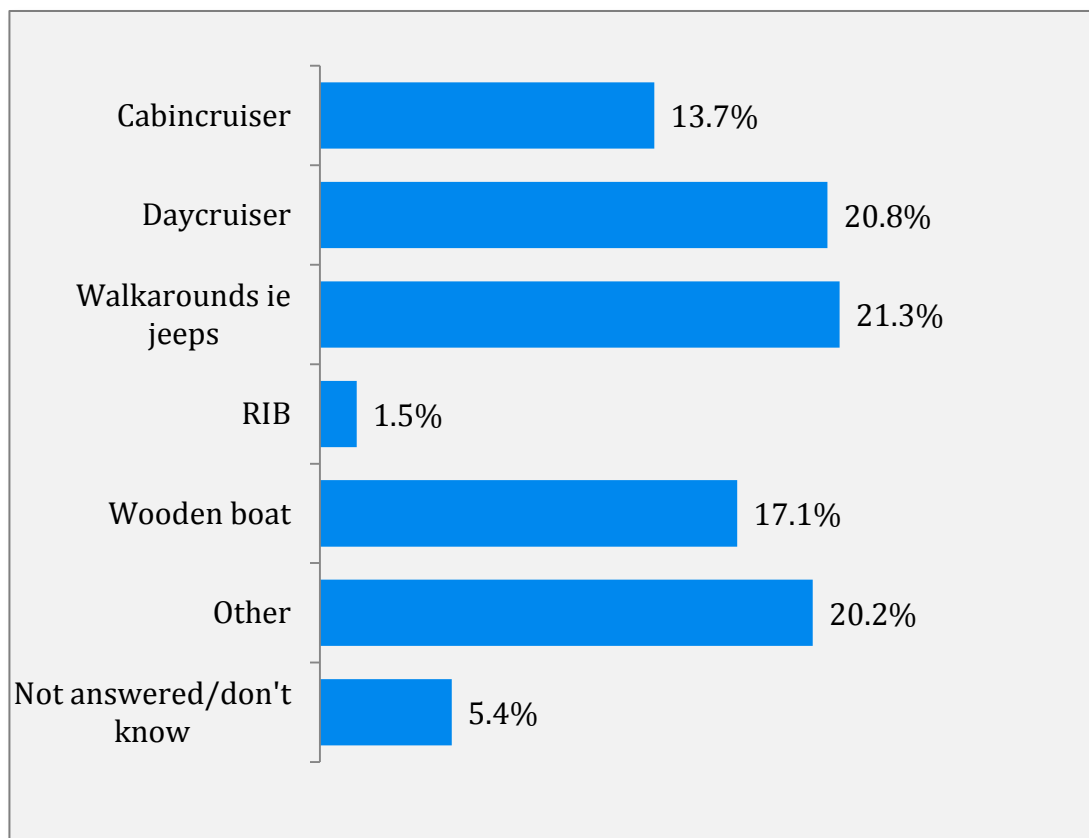
Seilbåter; **4,2 %**



The «jeep» and the daycruiser most common boats with engine

- We asked for some data about the households largest boat
- The «jeep» and the daycruiser are the most common types, approx ca 21 % of each
- RIB-boats is the smallest group (1,5%)

"Annet" inneholder en stor andel mindre "robåter med påhengs..."



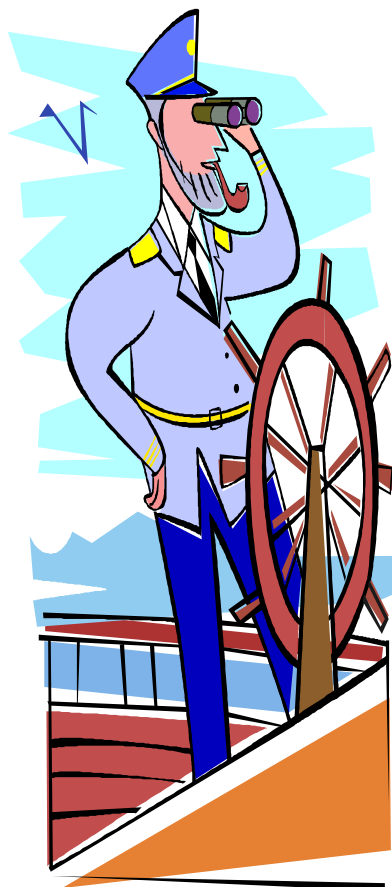
Base: 413 019 husholdninger som eier motorbåt

Some technical data on the Norwegian boats;

- Material
 - 8 out of 10 boats are GRP
 - 1 out of 10 is made by wood
- Year of manufacture
 - 1 out of 3 boats built 2000 and later
 - Which means that 33% are CE-marked
 - 1 out of 2 boats built 1990 or later
- Length
 - 1 out of 3 shorter than 15 feet
 - 1 out of 2 boats between 15-33 feet
 - Less than 10% longer than 34 feet
- Speed
 - 1 out of 2 have top speed above 20 knots
 - Less than 10% have top speed above 40 knots
- The Engine
 - 1 out of 2 have an otboard engine
 - 1 out of 4 have an inboard diesel engine
 - 1 out of 2 of main boats have 50 hp ore more
 - 1 out of 2 have an engine built 2000 or later



Den norske båtparken er godt utstyrt



	Totalt	Motorbåt u/o	Motorbåt m/o	Seilbåt
Brannslukningsapparat	54,3 %	34,3 %	79,0 %	73,0 %
Papirkart	48,0 %	30,7 %	67,8 %	71,4 %
Ekkolodd	45,3 %	29,9 %	66,9 %	44,4 %
Kompass	44,2 %	23,2 %	68,0 %	74,6 %
GPS	41,9 %	24,1 %	62,2 %	66,7 %
Toalett	31,9 %	3,7 %	61,8 %	85,7 %
Fastmontert leder som kan nåes fra vannet	31,3 %	18,4 %	46,1 %	49,2 %
Kartplotter	28,4 %	14,4 %	45,6 %	42,9 %
Bysse (kokemuligheter)	27,6 %	3,2 %	54,9 %	65,1 %
Varmeapparat	23,1 %	5,2 %	42,9 %	52,4 %
VHF	18,2 %	4,0 %	32,3 %	50,8 %
Landstrømsanlegg	16,2 %	3,3 %	26,9 %	57,1 %
Dusj	14,7 %	1,5 %	29,6 %	33,3 %
Varmtvannsbereeder	14,0 %	1,5 %	27,4 %	36,5 %
Gassanlegg	13,5 %	2,7 %	22,8 %	46,0 %
Radar	10,4 %	4,1 %	16,3 %	27,0 %
Sporing / gjenfinningssystem	10,4 %	5,9 %	16,1 %	12,7 %
Tyverialarm	6,6 %	4,2 %	9,9 %	7,9 %
Ikke noe utstyr	21,9 %	36,1 %	3,9 %	11,1 %
<i>Base: Husstandens hovedbåt</i>	392 960	213 451	151 628	27 830

The value of the main boat; in average NOK 180 000 ie. €23.000

- The total value of all main boats in Norway by end of May 2011, estimated to NOK 75,0 billion

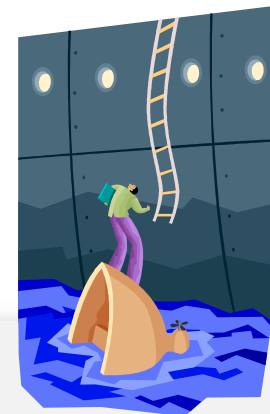
Average value by type	NOK
Canoe, kayak	6 826
Dinghy, rowboat wo/engine	8 078
Motorboat wo/sleepover facilities	88 624
Motorboat w/sleepover facilities	250 083
Sailboat wo/sleepover facilities	48 938
Sailboat w/sleepover facilities	367 711

Base: Estimated from households main boat

The use of Norwegian boats represent large values

- The households spent aprox. NOK **6,25 billion** on the use and maintenance of pleasure craft.
- Major cost components are fuel, docking, maintenance, insurance and «in-harbour» costs
 - Consumption pr day of use, kr 418,-
 - Seasonal costs pr household kr 14 228,-
- Increasing interest for «turn-key» solutions from yards and marinas
1 out of 10 will buy more services in the future

	MNOK
Fuel	1 323
Docking and vinter layup	1 102
Maintenance	1 059
Insurance	940
Food, entertainment, shopping related to vacation on board recreational craft	937
Upgrade/equipment/clothing	624
Other	267
Total consumption 2011, MNOK	6 252



4 out of 10 have insurance, full coverage

	Total	Liten båt u/motor	Motorbåt u/overnatting	Motorbåt m/overnatting	Seilbåt
Båtforsikring med full kasko	40.1 %	9.3 %	36.8 %	57.4 %	55.6 %
Båtforsikring med del kasko	9.3 %	2.6 %	8.5 %	12.3 %	19.0 %
Båtforsikring med kun ansvar	9.5 %	5.3 %	10.0 %	7.7 %	11.1 %
Båtforsikring gjennom innboforsikring	7.2 %	16.6 %	7.5 %	2.5 %	0.0 %
Har ikke forsikring	17.0 %	53.6 %	17.5 %	7.4 %	1.6 %
Ubesvart/vet ikke	16.8 %	12.6 %	19.8 %	12.7 %	12.7 %
	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
<i>Base: Husholdninger som eier båt/hovedbåt</i>	505 090	66 520	213 451	151 628	27 830

86% of the households who own a boat, used it in 2011

- Location
 - 3 out of 4 boats located at the coast
- Dock/mooring
 - More than 4 out of 10 privately docked
 - Almost 2 out of 10 in a commercial marina
 - More than 1 out of 10 in non-commercial marina
- Distance
 - 3 out of 10 boats located closer than 1 km from home
 - 3 out of 10 boats located between 1-10 km from home
- Boat captains
 - In more than 50% of the households who own a boat, there were more than two, one or more captains in the household.
- Charter
 - Less than 1,5% of boat owners have rented out their boat
- Journeys abroad
 - 6 % have made a journey from Norway to other countries
 - 23 % of the sailboats have been abroad in 2011
 - Primary destinations Sweden and Denmark



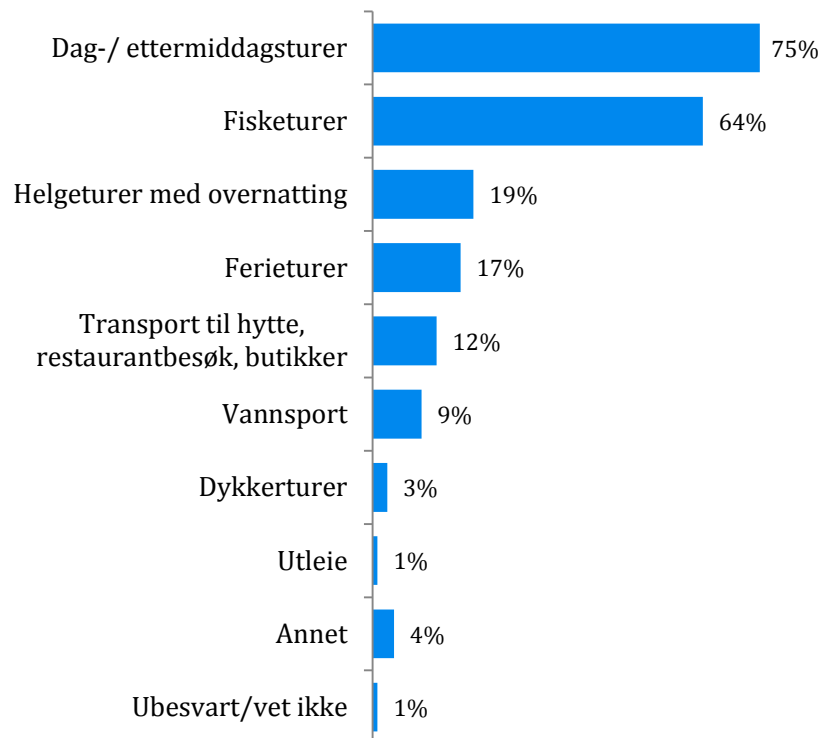
Daytrips and fishingtrips dominate the picture of use



foto: Flø Feriesenter

- Weekendtrips, 19 %
 - Sailboats 41 %
 - Motorboat w/sof 40 %
- Vacation journeys, 17 %
 - Sailboats, 56 %
 - Motorboat w/sof, 32 %

Whats the main purpose for use?



Base: 505 090 hovedbåter

The average boat user; 34 days at sea pr. year!

	Total	May	June	July	August	Sept	Oct–April
0 days		34.8 %	11.7 %	4.6 %	9.4 %	38.3 %	65.8 %
1–3 days	971 299	22.5 %	20.4 %	17.1 %	21.8 %	21.5 %	8.2 %
4–7 days	2 990 922	22.7 %	28.2 %	21.6 %	26.3 %	18.7 %	7.4 %
8–14 days	4 717 292	9.3 %	22.6 %	28.4 %	22.5 %	10.0 %	5.8 %
15 days or more	6 260 298	4.6 %	11.3 %	23.4 %	14.2 %	4.6 %	5.9 %
Not answered/don't know		6.2 %	5.9 %	5.0 %	5.9 %	6.8 %	6.9 %
Total, number of days	14 939 812	1 628 670	3 037 868	4 317 416	3 286 917	1 567 751	1 101 189
Average number of days in use in 2011	34	4	7	10	8	4	3
% use pr month	100.0 %	11.6 %	21.7 %	30.8 %	23.4 %	11.2 %	7.8 %

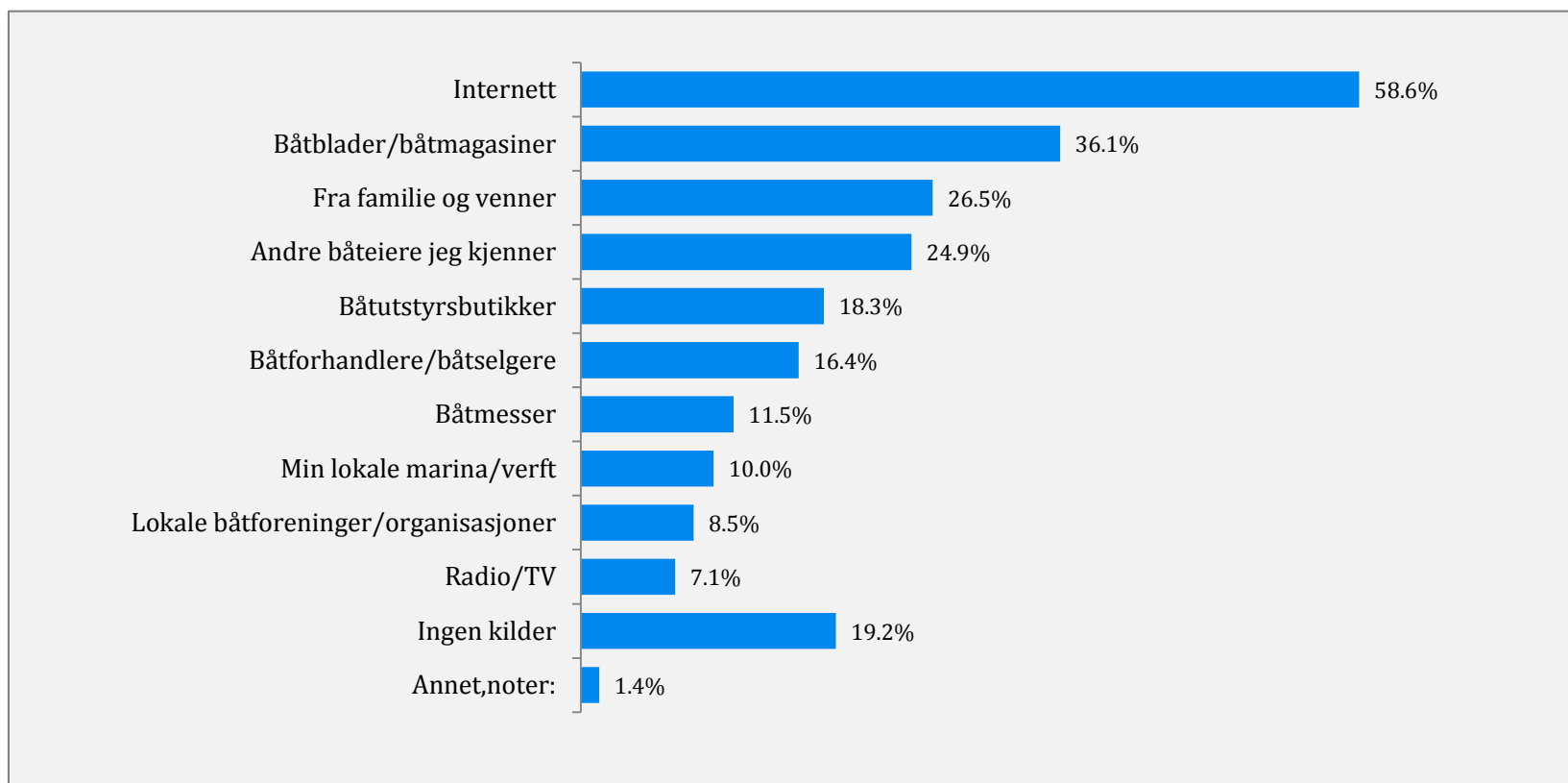
Base: 435 287 husstander som benyttet båten 2011

1,6 million sleepovers in boats, 7 per boat w/sleepover facilities

	Totalt	Hjemmehavn	Gjestehavn	Naturhavn	Annen regulert havn	Utenlands
0 dager		80.8 %	64.0 %	70.9 %	86.9 %	92.5 %
1–3 overnattinger	162 147	8.1 %	10.6 %	11.9 %	5.1 %	0.9 %
4–7 overnattinger	223 561	4.5 %	7.4 %	4.4 %	1.7 %	0.4 %
8–14 overnattinger	387 636	2.1 %	6.5 %	4.7 %	1.4 %	1.3 %
15 overnattinger eller flere(1)	795 884	2.1 %	7.7 %	4.4 %	1.1 %	0.7 %
Sum antall overnattinger	1 569 228	243 253	680 591	438 501	132 160	74 724
Gjennomsnittlig antall overnattinger i 2011, per overnattingssbåt	7					
Andel per havnetype	100.0 %	15.5 %	43.4 %	27.9 %	8.4 %	4.8 %

Base: 211 633 båter med overnattingsmulighet

Internet and magazines are the most important sources for information about boats, equipment and boating

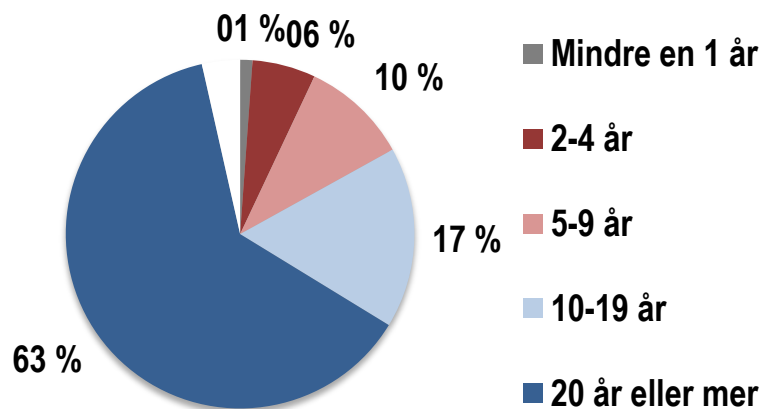


Base: Båtansvarlige

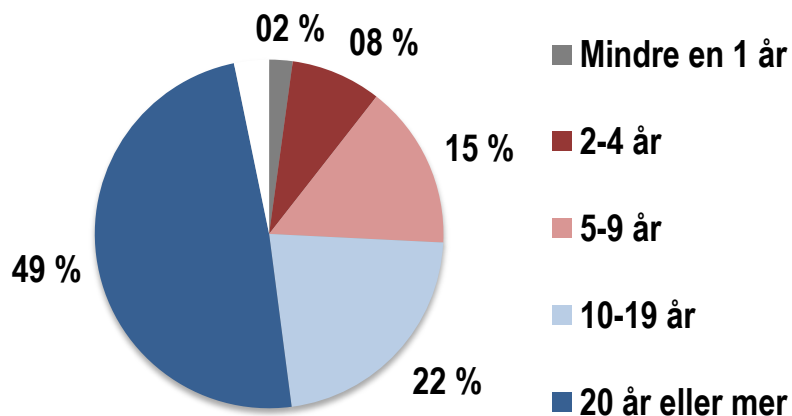
50% of boaters without formal maritime competence

	Total	Small boat wo/engine	Motorboat wo/ sleep-over facilities	Motorboat w/sleepover facilities	Sailboat
Boatmans proof	35.6 %	12.6 %	33.1 %	44.7 %	39.7 %
D5L,(Coastal skipper exam)	4.8 %	1.3 %	2.7 %	7.4 %	12.7 %
Higher Deck Officer Certificates	9.0 %	4.6 %	9.3 %	9.8 %	14.3 %
VHF Certificates	11.8 %	4.6 %	7.3 %	17.7 %	28.6 %
No formal competence	49.9 %	74.8 %	53.5 %	39.4 %	42.9 %
Un-answered/don't know	4.5 %	6.0 %	2.9 %	4.6 %	6.3 %
<i>Base: responsible for households main boat</i>	840 711	66 520	213 451	151 628	27 830

Erfaring

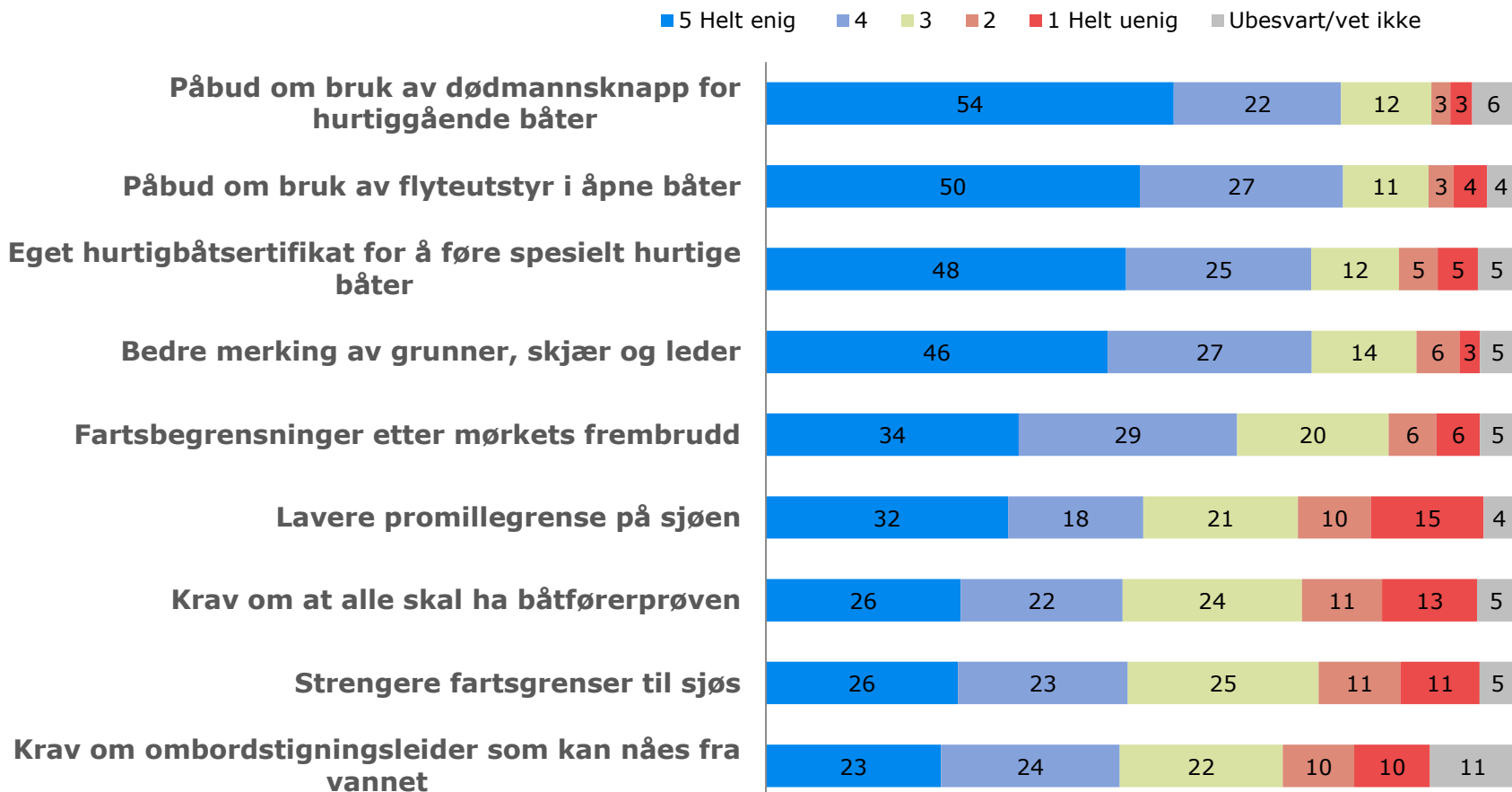


Eierskap



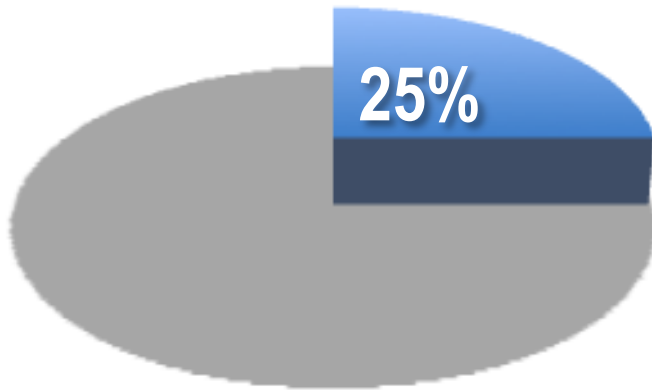
- Risiko
 - 1 av 3 som har vært på båttur mener "falle over bord" er største risiko
 - 3 av 10 mener grunnstøting, komme ut for dårlig vær, motorhavari
 - 2 av 10 mener brann/eksplosjon, kollisjon med gjenstander/båt
 - 1 av 25 var selv i en opplevd farlig situasjon i 2011
- Personlig redningsutstyr
 - 9 av 10 har til alle om bord
 - Kun 2,5% sier at de ikke har til alle
 - 83% bruker dette alltid eller som oftest
 - Kun 2,5% bruker det aldri
- Gransking av ulykker
 - 6 av 10 mener at fritidsbåtulykker bør granskes på lik linje med yrkesbåtulykker

Liten motstand mot forebyggende sikkerhetstiltak



Base: Båtansvarlige

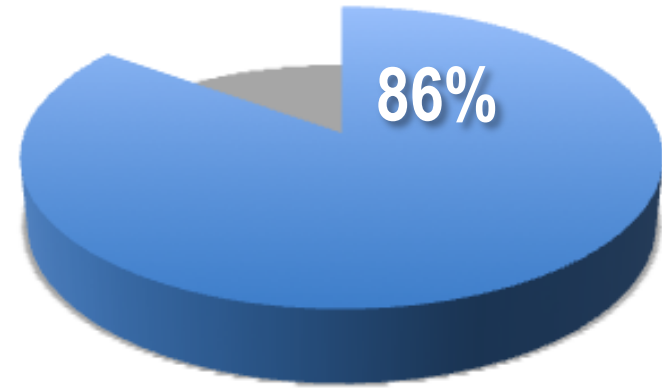
Highlights – Norwegian Boating Survey 2012



750.000 recreational crafts

75 Billion, boat value

Boaters are positive to reasonable measures to prevent accidents



50% on board a pleasure craft

6,25 billion used on boating

50% without formal competence



K·N·B·F

FOR ET BEDRE BÅTLIV