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BRITISH MARINE

Boating & Boat Ownership in the UK, 2020-21

Summer 2022

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Contents

BRITISH MARINE

Methodology

This report provides the reader with key market data, trends and insights on participation in watersports in the UK and the purchasing and ownership of boats, watersports craft and related equipment and services. This includes data on watersports participation trends; the impact of COVID-19 on watersports activity and ownership; attitudes to and resources used for training; the characteristics of different methods of participation, from hire and charter to private boat ownership; and boat purchasing and ownership trends, including the profiles of current and prospective owners.

This analysis is based on three main sources. The first consists of primary data collected by British Marine in its *Boaters & Boat Owners Survey,* which provides British Marine with detailed consumer demographic data related to participation and ownership of boats and watersports equipment. The second source is a decade-long study commissioned by British Marine and its partner marine organisations that has tracked participation in boating and watersports in the UK since its inception in 2012, providing vital information on the impact of COVID-19 on boating in the UK. The third source is a comprehensive database of brokerage boat sales in the UK, kindly shared with British Marine by *The Boats Group*, providing invaluable data on UK boat sales trends down to the make, model and specification of the boat and the location of the brokerage through which it was sold.

The *Boating & Boat Ownership* report is published to enhance knowledge of access to and participation in watersports and the private purchase and ownership of watercraft in the UK. This report has been produced for the benefit of British Marine and its members. It was only possible to complete this research with the support and assistance of our primary sponsor, Navigators & General, to which we extend our thanks. We would also like to thank the time dedicated by the wider boating public by engaging with British Marine's market research team, without which this report would not be possible. All data provided to British Marine to support the production of this report is held in complete confidence.

Executive Summary

- COVID-19 has had a profound effect on the UK's relationship with the outdoors. With many indoor and group activities hindered by travel and social distancing restrictions and health anxiety, the public flocked to outdoor recreation. There was a spike in nature visits throughout 2020 and 2021, with visits to "blue spaces" (canals, rivers, lakes and the coast) increasing in popularity, growing from an **18%** share of all nature visits pre-pandemic to **49%** in 2021.
- Boating and watersports initially suffered from the UK's pandemic lockdowns, with sharp drops in participation in early 2020, before benefitting from the surge in demand for outdoor activities that followed the re-opening of the economy in May 2020. With group-based watersports activities restricted for longer than solo and household-based activities, this period saw a spike in the share of individual, casual participants (**+7%**) and a drop in regular and club-based enthusiasts (**-10%**).
- The manner in which people participated also shifted. Travel and social distancing restrictions encouraged participation in smaller, household-based groups, greater use of smaller, more mobile craft for individual participation, while activities were localised to UK waters. Marina and waterway congestion and pandemic restrictions on hospitality and tourist sites also drove boaters to spend more time on the water, rather than combining cruising with shoreside spending.
- Approximately **58%** of participants took part in an activity using their own craft, with other forms of third party rental experiences accounting for most other experiences. Structured training (e.g. sailing schools) accounted for about **8%** of experiences on the water and hire, charter and other forms of rental (e.g. peer-to-peer and subscription clubs) made up a third (**34%**) of excursions undertaken by participants.
- Of these commercial rental experiences, holiday-based hire or charter dominated, with coastal and offshore yacht charter accounting for over half (**52%**) of experiences and inland hire – mainly on the canal network, Thames and Norfolk Broads – accepting a third of participants. Peer-to-peer and subscription clubs (e.g. Freedom Boat Club) accounted for just **2%** of these experiences, although this market is clearly growing in popularity with these business models expanding rapidly over the last 2 years.
- The demand for escape through water-based activities also drove an increase in new entrants to watersports, with nearly a quarter (**24%**) of participants who took part in 2020 doing so for the first time. This trend was particularly pronounced in "gateway" boating activities like paddleboarding and kayaking, with nearly a third of respondents (**31%** and **28%**, respectively) who took part in these activities starting within the last 12 months.
- Prior to the pandemic **67%** of participants experienced some form of training, however, the influx of new participants during COVID-19 has led to a dramatic fall in the share of boaters receiving a minimal level of training (to just **47%**), which has coincided with a sharp increase in both fatal and non-fatal incidents on the water. Typically, most respondents learned about their activity through a mixture of formal and informal training, with many boaters learning through family, school and clubs, certifying their knowledge through formal qualifications and then updating this knowledge through a mixture of books, magazines, blogs and industry websites.

Executive Summary (continued)

- This influx of new boaters also had a knock-on effect on boat sales, with sales estimated to have increased by **9%** in 2020 and then a further **2%** in 2021. **7%** of survey respondents who purchased their craft in 2020 also started participating the same year, with first-time buyers favouring paddleboards (**58%**), canoes or kayaks (**36%**) and narrowboats (**40%**). This trend towards first-time watersports participation and ownership continued into 2021, with an increase in the share of first-time owners across almost every type of boat and watersports craft.
- **23%** of respondents to the survey indicated that they were likely to purchase a new boat or watersports craft within the next 12 months, with most interested in sailing yachts (**32%**), motor cruisers (**25%**) or trailerable powerboats (**19%**). According to respondents, attending industry exhibitions like Southampton International Boat Show has the greatest influence on their purchasing decision (**69%**), followed by boating magazines and websites (**48%**). However, very few current owners purchased their boat directly at an exhibition (just **1.4%**), with most using the opportunity to view multiple brands and talk directly with companies before making a purchase later. This was most commonly done through a marine brokerage or dealership (**65%**), either directly or online. Most owners purchased these craft using savings or a part-exchange, with only a small proportion buying their boats using credit (**7%**).
- British brands dominated the style of boats that consumers were interested in purchasing, especially in the UK's traditional boatbuilding niches, such as dinghy sailboats – with RS Sailing and Laser Performance popular, rigid inflatables – where Ribeye, Ribcraft and Humber Inflatables led responses – and motor cruiser / motor yacht segments, with luxury brands such as Princess, Sunseeker, Fairline and heritage marque Sealine (now under German ownership through Hanse Yachts AG) all prominent. In the sailing yacht and speedboat markets, however, demand is dominated by European and American brands, like Jeanneau, Beneteau, Bavaria, Hanse, Halberg-Rassy, Bayliner and Quicksilver.
- This report also underlines the key drivers behind participation among different participant profiles, with self-control, mental achievement, physical challenge and socialisation common across activity types, demographic groups and psychosocial profiles, regardless of the type of activity being participated in. In fact, the frequency of that participation rather than the method was shown to be more important in maximising well-being value to the participant. Many participants combined their main watersports activity with multiple other watersports and outdoor activities that promote similar experiences and physical and mental wellbeing, particularly cardio-based activities. However, rather than being competitors to boating and watersports – which promote a unique lifestyle and culture with specific technical requirements – these other activities (e.g. cycling) should be seen more as complimentary pursuits.
- The report also gauged attitudes of respondents to environmental issues, such as the use of hybrid or electric propulsion, sustainable building materials and renewable energy sources to power onboard electrics. Unfortunately, take-up of electric propulsion was limited, with just **0.4%** of respondents using this form of propulsion. This is in part due to the availability of technical marine solutions in the marketplace and the infrastructure to support its expansion, although electric craft are becoming more popular for use on inland rivers and canals. Respondents did, however, indicate a strong interest in use of sustainable building materials in boat production (**54%**), although almost a third (**30%**) of respondents remain sceptical, with many only likely to approve of sustainable boat production if designs and materials are fully regulated and quality assured. **49%** of respondents used renewable energy (solar or wind) to power their onboard electrics, rising to **56%** and **67%** among more eco-conscious narrowboaters and sailing yachtsmen, respectively.

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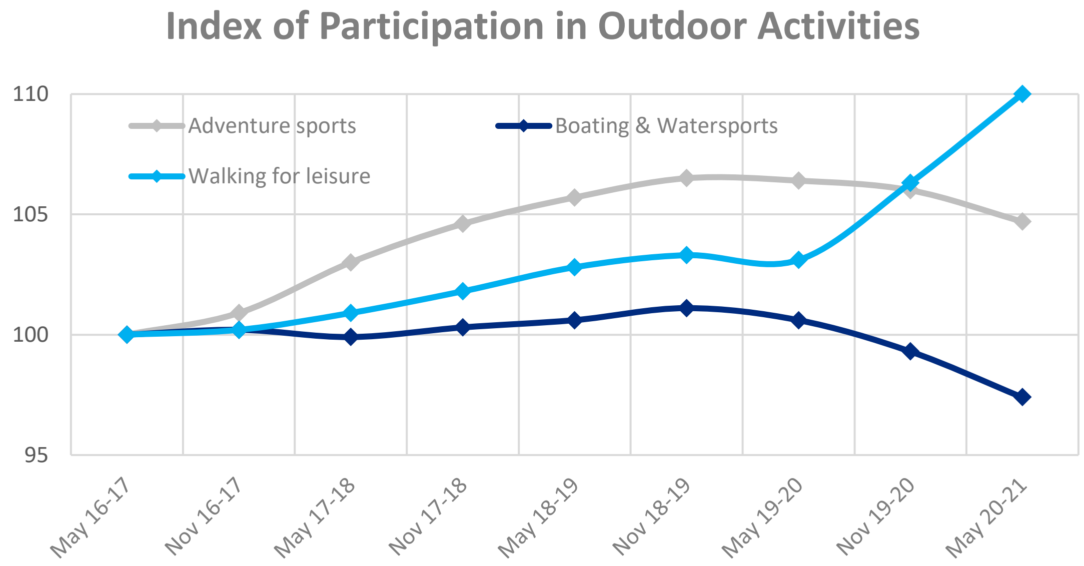
COVID-19: Impacts on Watersports Participation & Ownership

Participation in Outdoor Recreation

Sport England and British Marine's latest consumer surveys indicate that the pandemic had a varied affect on sporting participation. With the economy in lockdown, casual activities like walking saw a steep increase in take up, while activities like watersports - dependent on travel, use of public premises or complex equipment – declined due to lack of access and opportunity. Watersports was particularly impacted by closures or restrictions at marinas and clubs that hindered access to equipment and prevented major forms of participation through club rallies, racing and training events. However, participation rebounded in mid-2021 as the economy opened to socially distanced activities, leading to an upsurge in casual, first-time participation in watersports (see page 9).



Participation Trends 2020 v 2019: Watersports & Coastal Activities

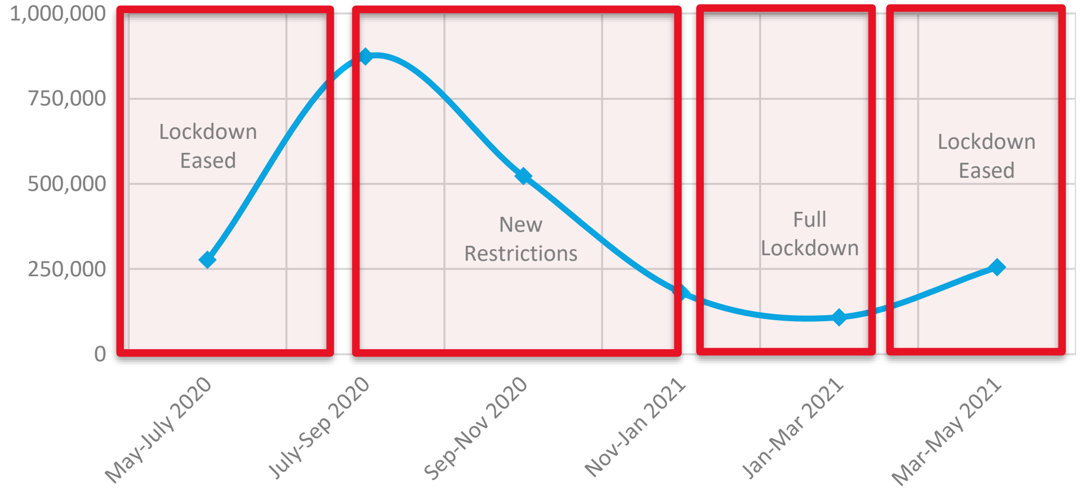
Outdoor Activities	Activity Type	+/- %	Chart
Small Sailboats	Boating & Watersports	-1.5%	
Sailing Yachts	Boating & Watersports	-1.6%	
Powerboats	Boating & Watersports	-2.8%	
Canal Boats	Boating & Watersports	-4.4%	
PWCs (e.g. Jetskis)	Boating & Watersports	-2.6%	
Paddlesports	Boating & Watersports	-1.8%	
Other Watersports	Boating & Watersports	-1.3%	
Angling	Coastal Activity	-0.5%	
Climbing / Coasteering	Coastal Activity	-2.1%	
Coastal Walking	Coastal Activity	22.7%	
Outdoor Swimming	Coastal Activity	5.4%	

Sources: Sport England, Active Lives Survey data; British Marine, Watersports Participation Survey 2020

Timeline of Impacts on Watersports Participation

While activities like walking or cycling could be practiced throughout the pandemic, access to watersports suffered varying restrictions throughout. Private participation was restricted for 3 months from March to May, before enjoying a recovery. Organised participation – whether through sailing clubs or hire or charter - was restricted until 2021, however, with only households able to participate. 2021 has since a full recovery in participation from private individual and household activities to group participation through clubs and commercial hire and charter operators.

Watersports Participation during COVID-19 by Key Phase (Participants)



Source: Sport England, Active Lives Survey data

COVID-19 Timeline of Impacts

Mar-May 2020: National lockdown imposed. No participation in any watersport, access to marinas and sailing clubs or hire or charter. Limited solo exercise permitted (e.g. walking, cycling)

May 2020: Access to marinas and sailing clubs permitted, with social distancing. Household-only participation in watersports permitted.

June 2020: Day hire and charter activities also permitted, covering households-only.

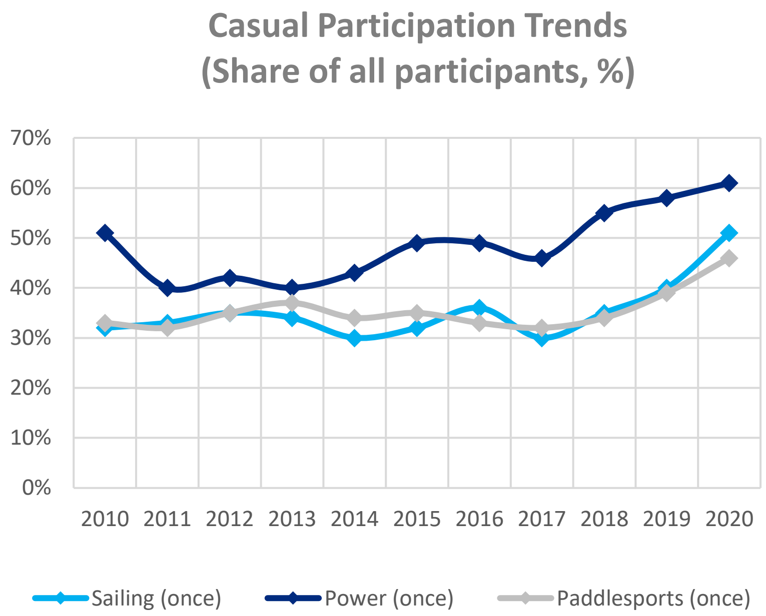
Sep 2020: "Rule of 6" restrictions introduced, expanding household-based activities. Larger group-based watersports activities still restricted (e.g. training, rallies, races).

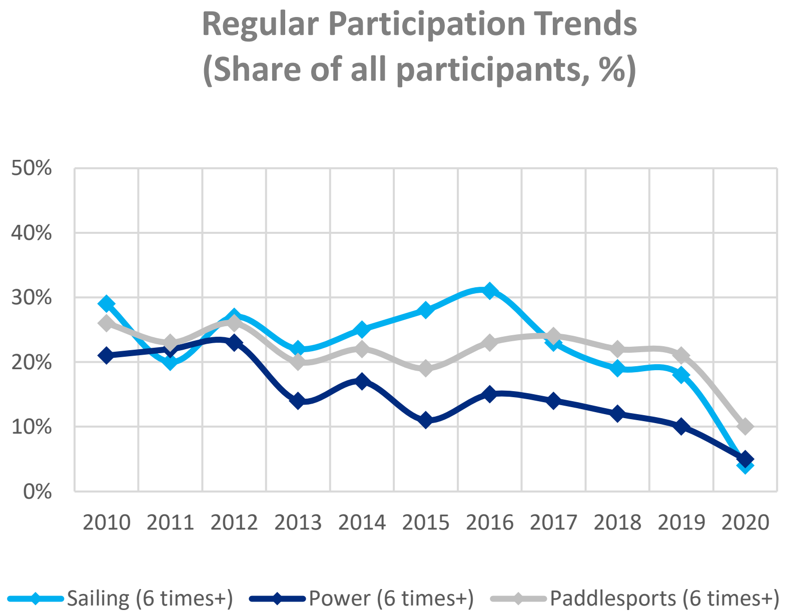
Nov-Feb 2021: New national lockdown introduced in November, with group outdoor activity prohibited. Stricter local restrictions introduced for regions with higher infection rates.

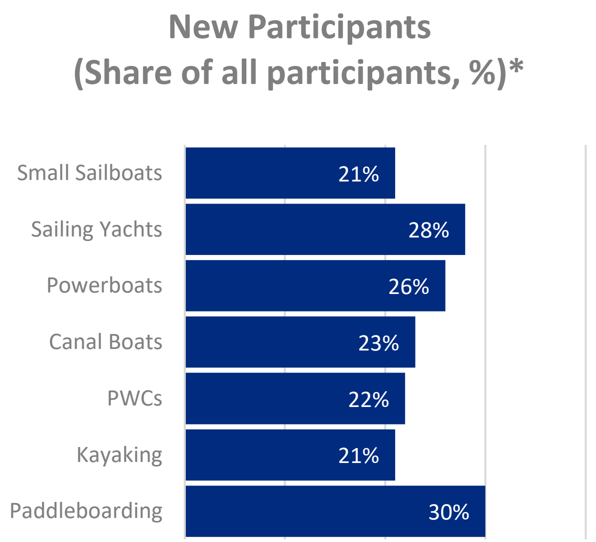
March-July 2021: Restrictions eased, with group outdoor activities able to take place. All legal restrictions removed in July 2021.

Watersports Participation Long-Term Trends

The persistence of public health restrictions throughout 2020 resulted in a very uneven recovery in watersports participation. In 2020, participation declined overall, but restrictions on travel and indoor activities also encouraged take-up from new, casual participants, especially activities with low barriers to entry, like paddleboarding. Meanwhile, regular participants – many of whom participate through clubs and other structured forms of participation – dropped off due to restrictions on group activities. Restrictions on organised participation also encouraged consumers to purchase their own watercraft, helping to boost boating and watersports equipment sales from June 2020 onwards.







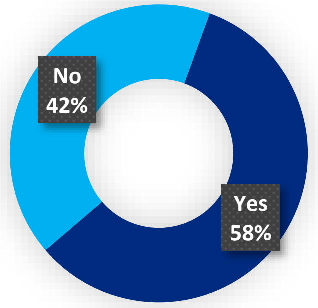
Based on responses to the question "How many years has it been since you **started participating in each the following activities?" (all respondents who answered "less than 1 year").*

Source: British Marine, Watersports Participation Survey 2020

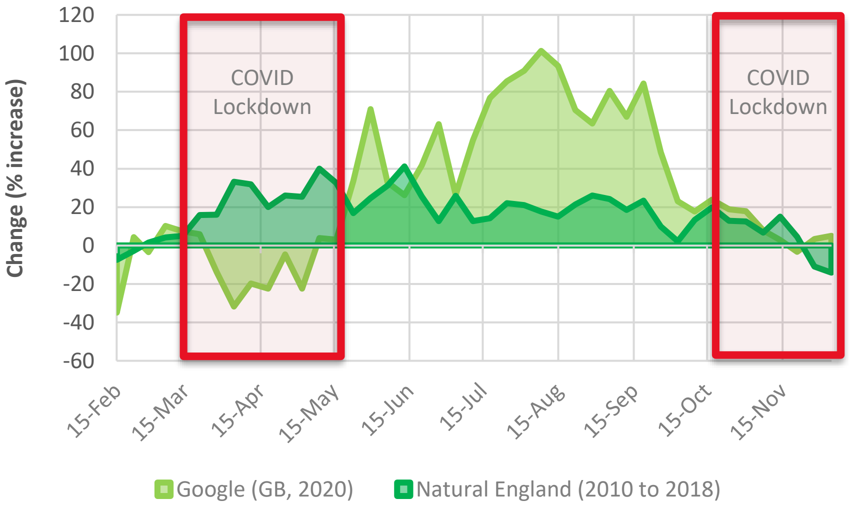
Changes to Outdoor Recreation during COVID-19

Lockdown forced a rapid reduction in access to outdoor spaces, but the relaxation of these measures and travel and social restrictions encouraged higher levels of outdoor activity from June 2020 onwards, including access to blue spaces and watersports. But the nature of participation changed significantly. With international travel bans, social distancing rules and facilities ashore restricted, activities decreased overall, with more local cruising undertaken, leading to crowded marinas and waterways. In this environment, less time (and money) was spent on local amenities, with less socialization ashore or group boating activities, and more passage planning required, eroding the freedom, spontaneity and sense of community prized by boaters. Those participating through structured training, rallies and races via clubs or through commercial hire or charter were hit even harder, with access restricted throughout the first year of the pandemic. These participants were forced into undertaking solo watersports (e.g. dinghy sailing or paddlesports) or participating in other, more accessible outdoor activities.

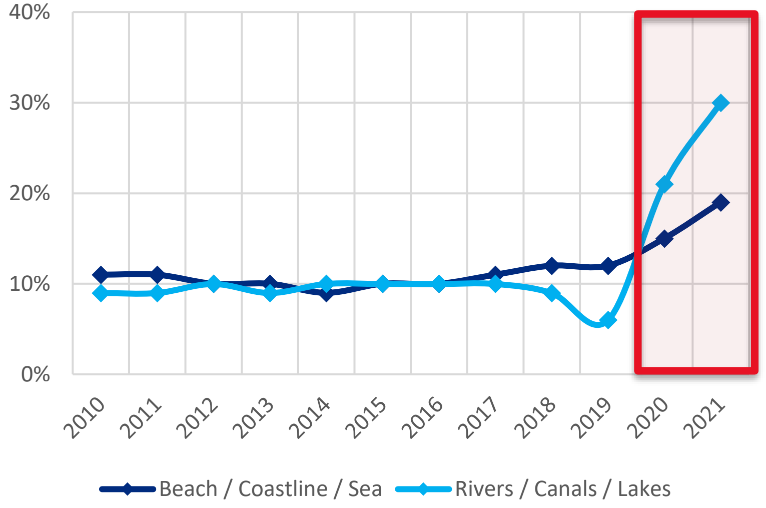
Has the way you participate in watersports changed during COVID-19?



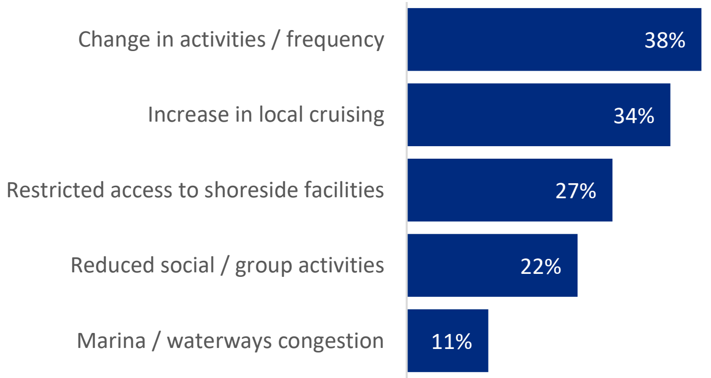
Access to Nature during COVID-19 (2020): Change against pre-COVID Baseline (%)*



Trends in Access to Blue Spaces: Share of All Outdoor Nature Visits (%)



Effects of COVID-19 on Boating & Watersports Activities (%)

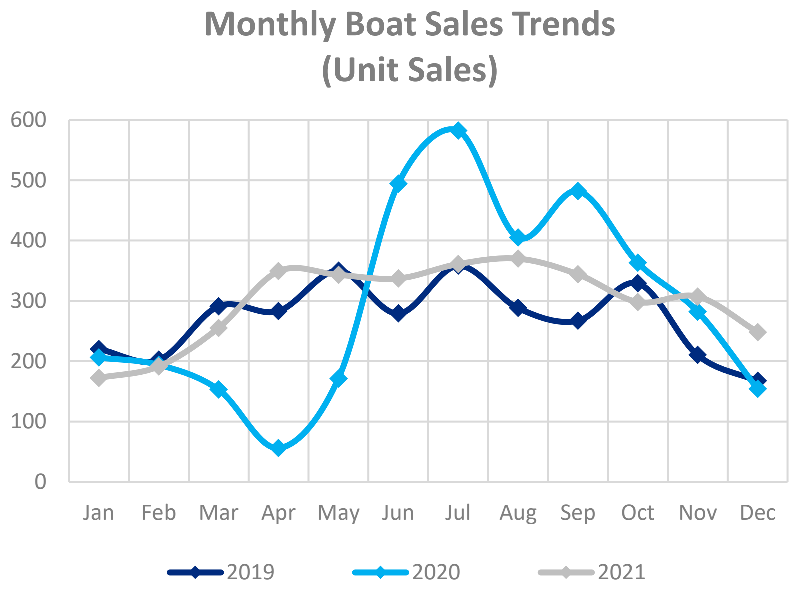


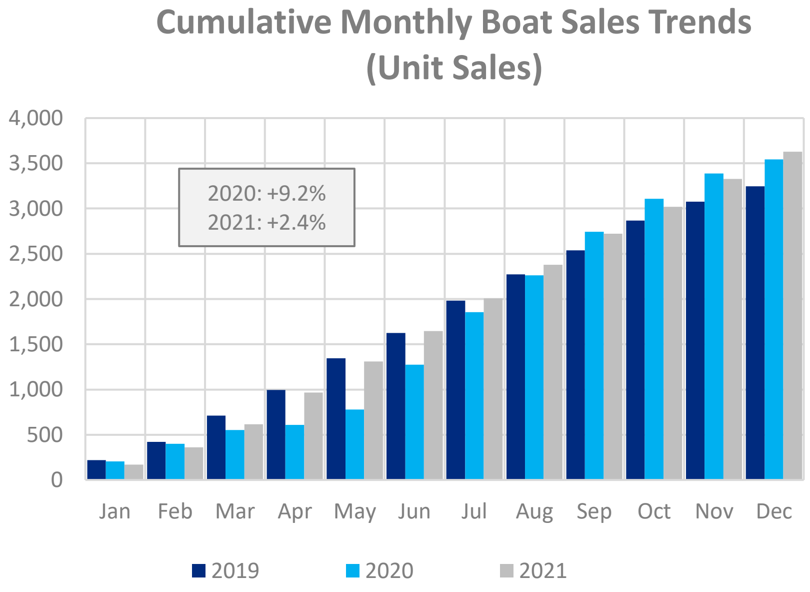
**Change in mobility to parks and public green spaces compared with February 2020 baseline, comparing Google mobility reports (2020) with Natural England, Monitor of Engagement with the Natural Environment (2018-19)*

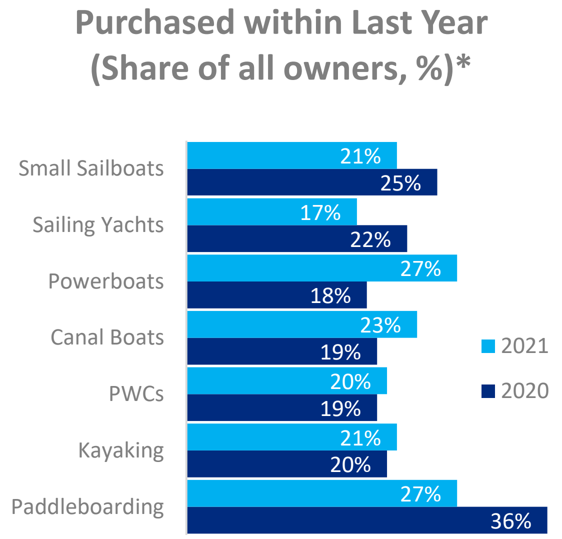
Sources: ONS, "How has lockdown changed our relationship with nature?" https://tinyurl.com/4669pcc; Natural England, Monitor of Engagement with the Natural Environment (2009-10 to 2018-19); Natural England, People and Nature Survey (2020-present); British Marine, Boaters & Boat Owners Survey 2021

Consumer Purchasing & Ownership Trends

As with participation, the UK's first national lockdown initially reduced sales of boats and watersports equipment, with use of outdoor spaces limited to only essential activities, preventing visits to marinas and brokerage showrooms to complete boat purchases or access to water bodies to use equipment. However, the opening of the economy resulted in a boom in sales, unleashing a pent-up desire to recreate and use money saved from postponed spending and Government welfare schemes. Pre-planned purchases were finalised in the early summer, leading to a spike in sales in June-July 2020, with ongoing social distancing and travel restrictions fuelling a further surge in demand for boats and watersports equipment that lasted throughout the summer of 2020 and into 2021.





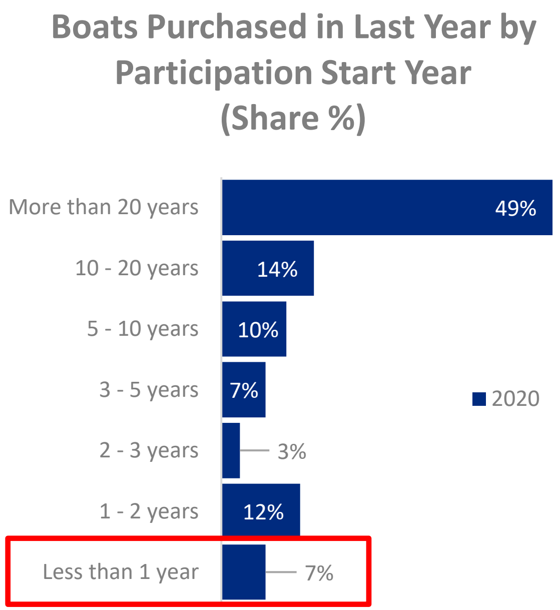


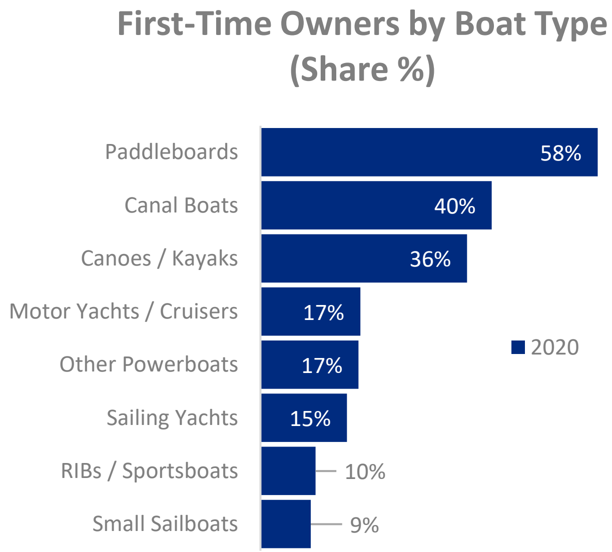
Based on responses to the questions: "Which of the following types of boat and watercraft does your household own?" and "When did you/ your household purchase the **most recent watercraft?" (all respondents who answered "within the last year").*

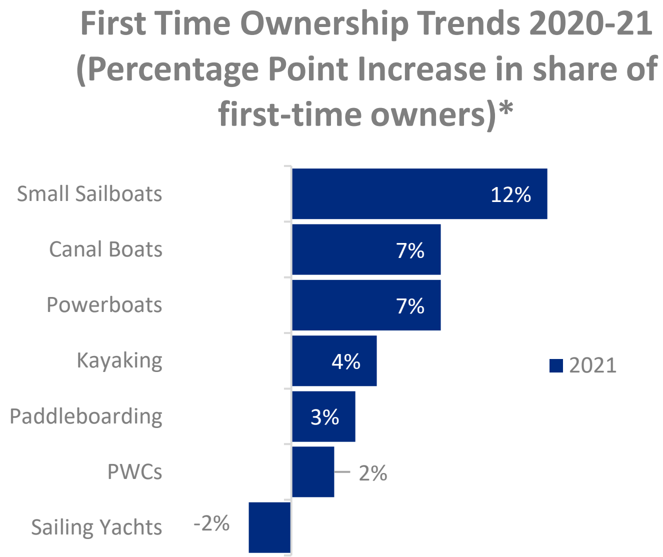
Source: British Marine, Boat Sales Dashboard; British Marine, Watersports Participation Survey 2021

New Boat & Watercraft Owners

With social distancing and travel restrictions galvanizing interest in domestic outdoor recreation, boating and watersports have benefitted from a significant number of new entrants, both in terms of participation and ownership. It is estimated that about **10%** of new boat sales in 2020 were from newcomers. Of these purchases, watersports craft like canoes / kayaks and paddleboards were most popular, followed by narrowboats for use on inland waterways.







**Based on responses to the questions: "Which of the following types of boat and watercraft does your household own?" and "Was the most recent watercraft you/ your household purchased the first one owned since starting the activity?" (all respondents who answered 'yes'").*

Sources: British Marine, Boaters & Boat Owners Survey 2021; British Marine, Watersports Participation Survey 2021

Boating & Watersports Participation: Demographics & Profiles

Demographic Trends

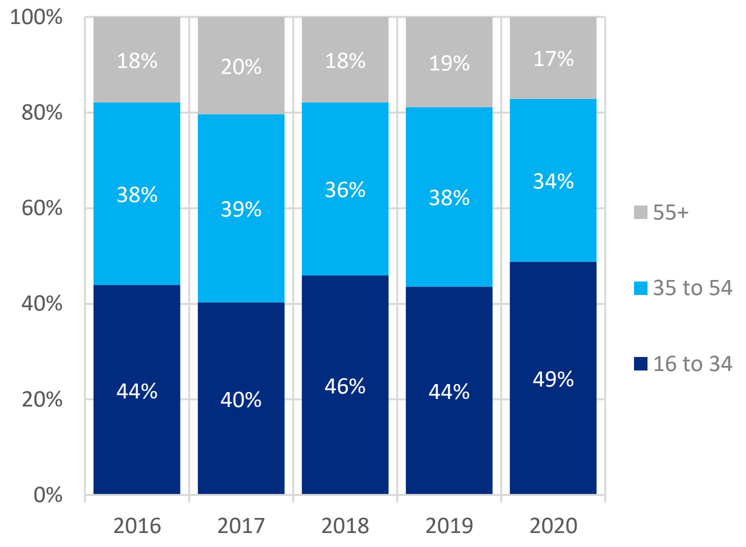
Boating in the UK is dominated by participation in more accessible paddlesports, followed by day and holiday hire motorboating and finally small sailboat activities, including racing. With risk levels related to COVID-19 favouring under 35s, the share of 16-34 participants grew overall, taking part in greater numbers and more regularly, as they sought respite from COVID restrictions. Meanwhile, participation from greater risk age groups (55+) declined, particularly with access to holiday hire restricted during the pandemic, leading to a decline in participation in power activities, particularly one-off hire activities.

Participants by Boating Activity & Age Group (Share %, 2020)*

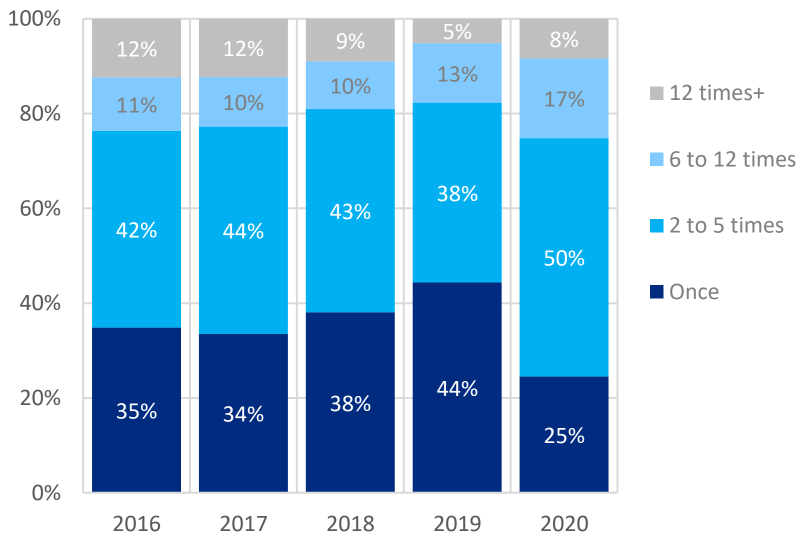
	All Ages	16 to 34	35 to 54	55+
All Sailing Activities	5%	10%	4%	1%
Small sailboat racing	1%	3%	1%	0.2%
Small sailboat activities	2%	5%	3%	1%
Yacht racing	1%	3%	1%	0.2%
Yacht cruising	2%	4%	2%	1%
All Power Activities	10%	17%	9%	5%
Canal Boating	4%	7%	3%	2%
Power Boating	3%	6%	2%	1%
Motor Boating / Cruising	5%	8%	5%	3%
PWCs	3%	6%	3%	1%
All Paddlesports Activities	9%	16%	9%	2%
Canoeing / Kayaking	6%	12%	7%	2%
Rowing / Sculling	2%	4%	1%	0.3%
Stand up Paddleboarding	4%	8%	4%	1%

**Note, figures represent share of total survey sample.*
highlighted figures represent salient statistics for the reader.

Participation by Age Group (Share %)



Participation by Frequency (Share %)

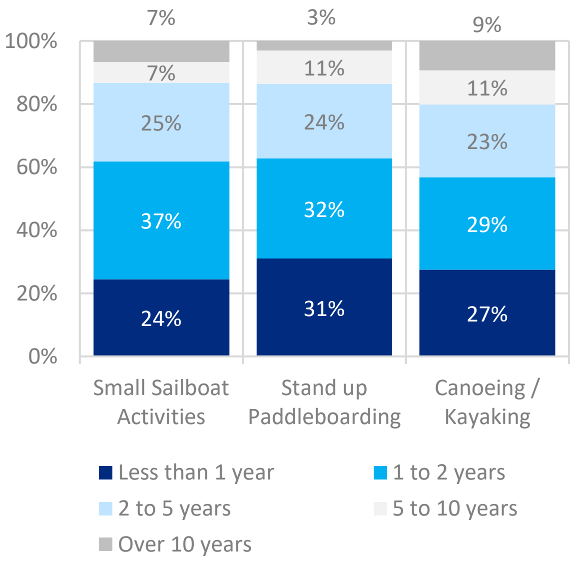


Sources: British Marine, Boaters & Boat Owners Survey 2021; British Marine, Watersports Participation Survey 2021

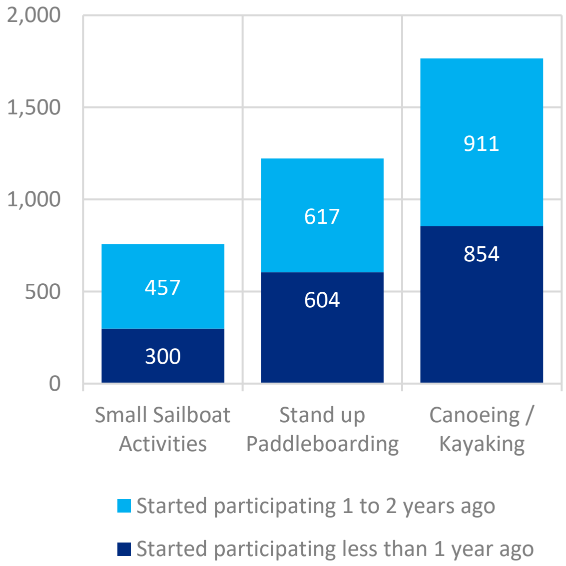
New Participants

Participation by new entrants has seen a dramatic increase since the onset of the pandemic, with gateway watersports activities like kayaking, paddleboarding and dinghy sailing seeing over a quarter of participants start within the last year, and over half within the last 2 years. New participants are drawn by the low input costs, mobility, physicality and ease of accessing the water via these activities, with participants seeking a tonic to the isolation, restrictions and stresses of COVID-19. Using the DRAMMA model, a psychosocial analytical framework for assessing how participants derive maximum value from leisure participation, we can see leisure activities can help participants disconnect from the stress of the pandemic, regain self-control in a period of uncertainty, build proficiency in mentally challenging tasks whilst deriving meaning and emotional sustenance through connectedness to nature and a community of like-minded participants. Recent research from British Marine underlines the particularly beneficial impact of watersports participation on individuals' wellbeing value, with higher levels of activity significantly contributing to the reduction of anxiety while boosting a sense of purpose, happiness and overall life satisfaction.

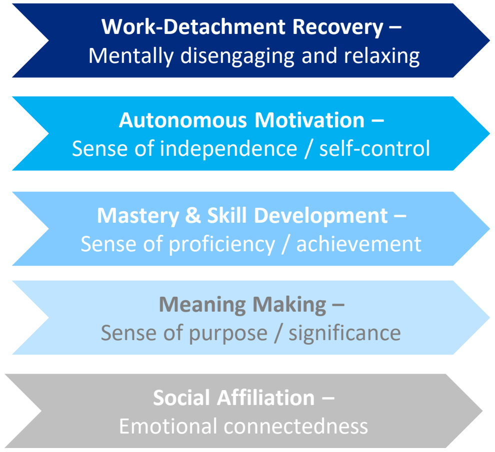
Participation in Gateway Activities by Level of Experience (%)



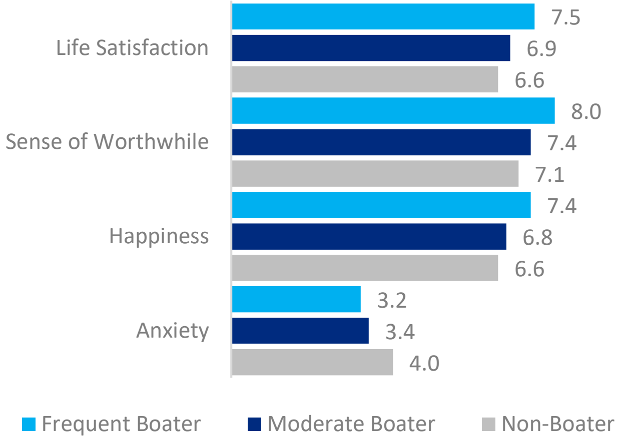
Estimated New Participants by Gateway Activity (000s)



DRAMMA Model: Psychosocial Motivations for Leisure Participation



Subjective Ratings of Wellbeing: Boating & Watersports*



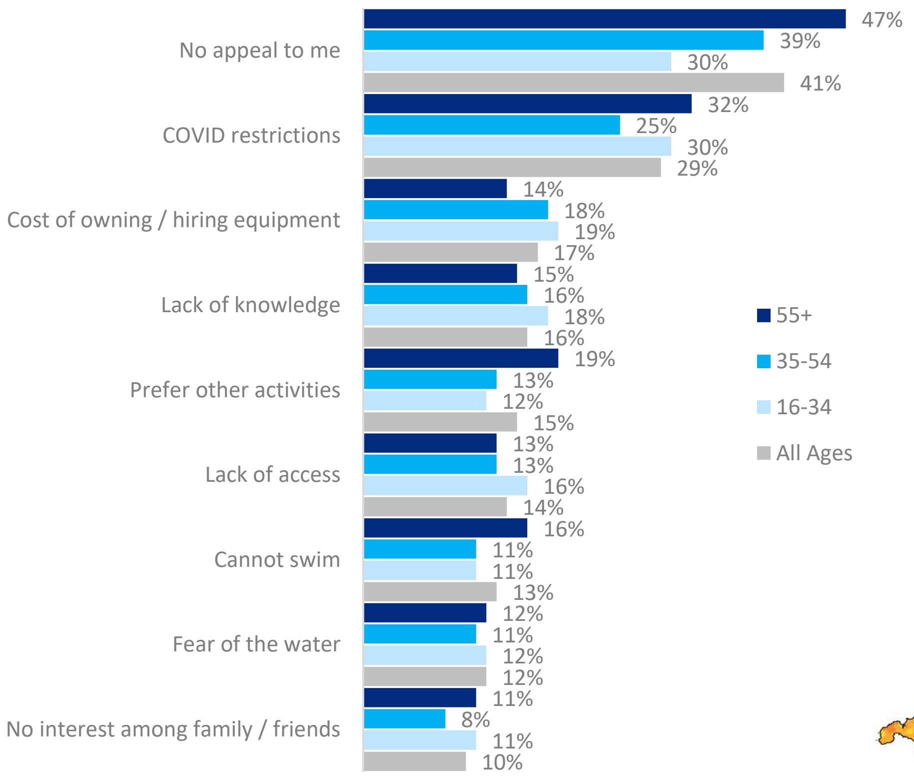
**Based on the ONS wellbeing survey, which asks respondents to rate their wellbeing out of 10 using the four metrics above. This chart compares the ratings of a sample of boating and watersports participants (n = 1,554) against those of the non-boating population.*

Sources: British Marine, Watersports Participation Survey 2020; Morse, Fine & Friedlander, Creativity and leisure during COVID-19: examining the relationship between leisure activities, motivations, and psychological well-being, Front Psychol, 2021: 12; British Marine / Canal & River Trust, Measuring the economic, social and wellbeing value associated with inland and coastal boating (2021).

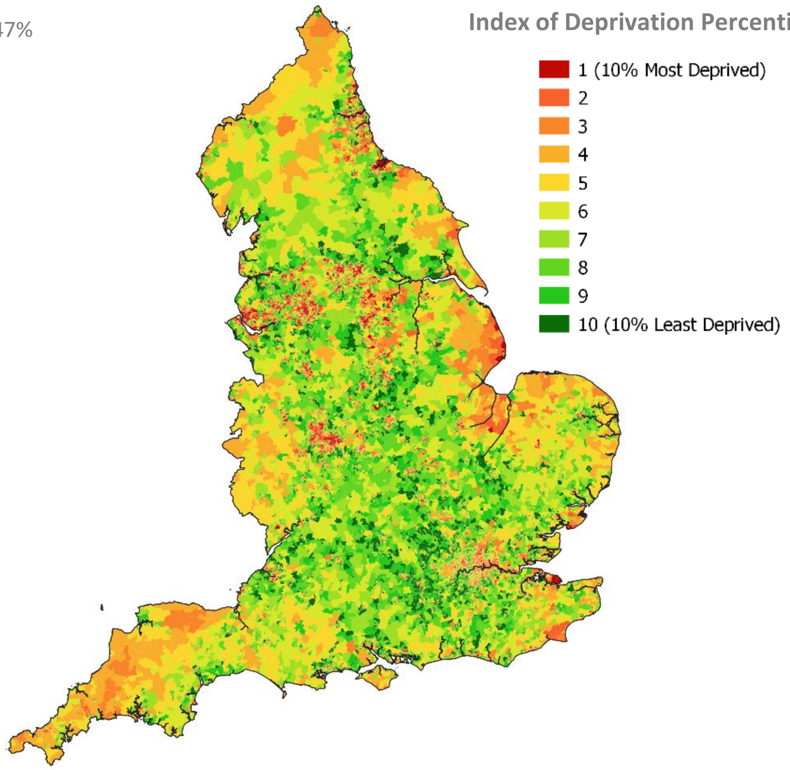
Non-Participation in Watersports

Outside of the temporary disruption of pandemic restrictions, the largest indicator for non-participation is the lack of cultural familiarity and knowledge about water-borne activities, reducing its appeal to the public, followed by the cost of participation and access to waterways. While a significant share of the UK population have direct access to coastal or inland waterways, many of these communities are some of the poorest in the UK, with seaside and coastal towns rating highly on the ONS Index of Multiple Deprivation. Therefore, investment and economic development is key to promoting boating as a viable lifestyle. Improving socioeconomic conditions, coupled with developments in waterway infrastructure, awareness and cultural connection to the marine environment could yield significant gains in expanding the profile of boating and watersports in the UK.

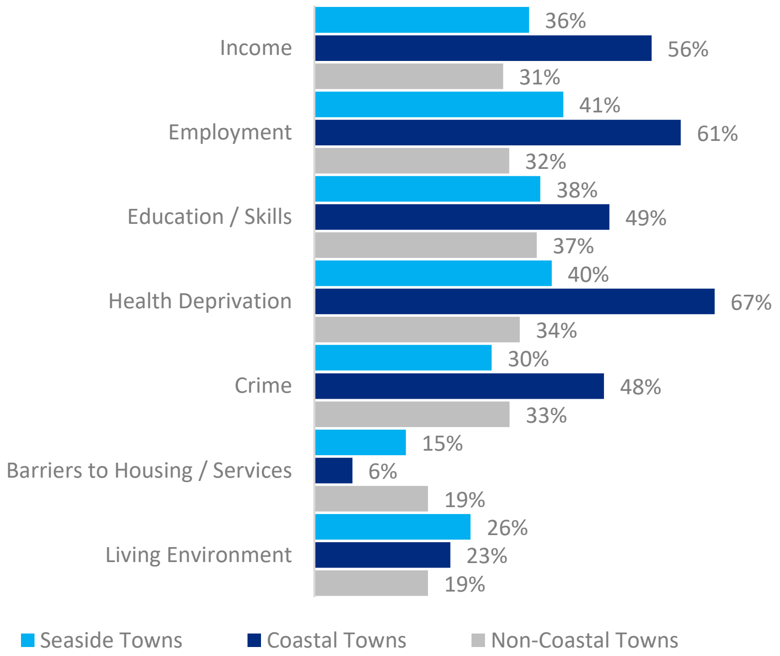
Main Reasons for not Participating in a Watersports Activity (%)



Index of Multiple Deprivation (IMD): Map of England



Share of Population Living in 30% Most Deprived Areas by Deprivation Measure (%)



Sources: British Marine, Watersports Participation Survey 2020; ONS, Indices of Multiple Deprivation (2019)

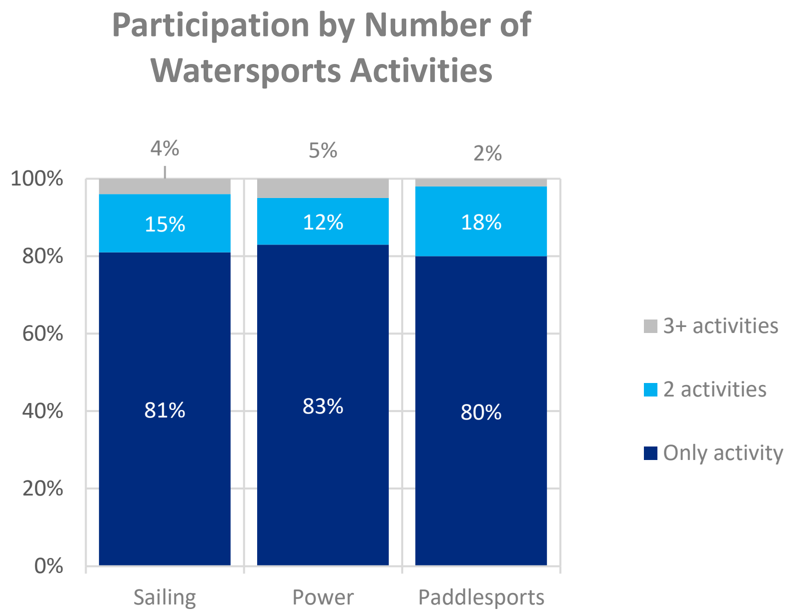
Watersports Activity Combinations

Most participants take part in just one activity (**80%+**), with paddlesports and powerboat activities the most common activities to be participated in just the once, usually on day hires. Of the participants taking part in more than one activity, most only have one other activity. Regular, enthusiastic participants are more likely to participate in multiple activities. Cheaper, more accessible paddlesports are the most likely to be combined with other activities as a secondary activity, with participants often hiring out these craft. Sailing activities are also highly likely to be combined, with small sailboat or sailing yacht racers also participating in cruising activities.

Activity Combinations: Main Activity v Other Activities (Share %)

Other Activities \ Main activity	Small sailboat racing	Small sailboat activities	Sail Yacht racing	Sail Yacht cruising	Power boating	Motor Boating / Cruising	Canal boating	PWCs (e.g. Jetskis)	Canoeing / Kayaking	Stand Up Paddleboarding	Rowing / Sculling
Small sailboat racing	-	25%	37%	22%	16%	8%	11%	15%	8%	14%	24%
Small sailboat activities	52%	-	49%	40%	28%	17%	19%	26%	21%	23%	32%
Sail Yacht racing	32%	21%	-	22%	17%	10%	12%	15%	7%	13%	18%
Sail Yacht cruising	40%	34%	44%	-	26%	20%	16%	24%	14%	17%	28%
Power boating	36%	31%	44%	33%	-	27%	19%	36%	17%	22%	29%
Motor Boating / Cruising	36%	37%	52%	49%	52%	-	31%	38%	23%	29%	32%
Canal boating	37%	29%	43%	29%	26%	23%	-	29%	19%	19%	27%
PWCs (e.g. Jetskis)	37%	31%	43%	33%	39%	22%	22%	-	19%	26%	28%
Canoeing / Kayaking	46%	54%	45%	43%	39%	29%	32%	42%	-	56%	53%
Stand Up Paddleboarding	49%	37%	49%	33%	32%	23%	21%	36%	36%	-	37%
Rowing / Sculling	34%	22%	30%	22%	18%	10%	12%	16%	14%	15%	-

Note: highlighted figures represent salient statistics for the reader.



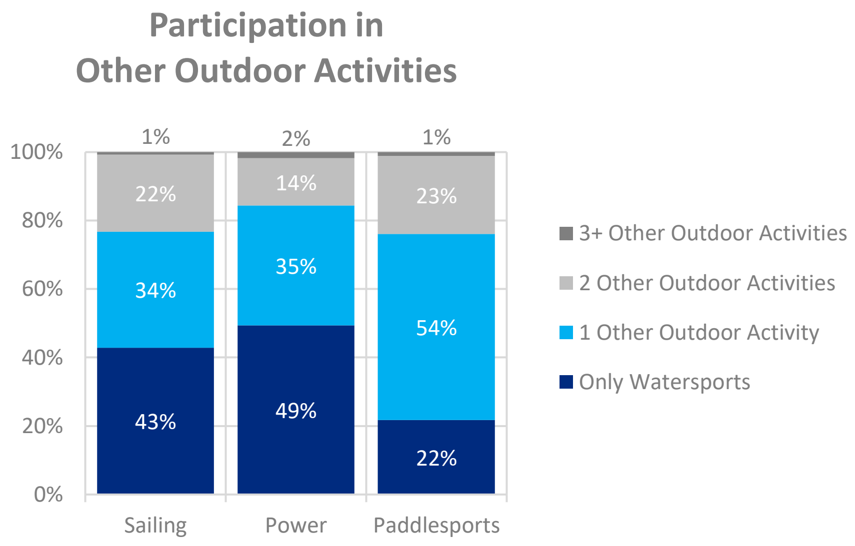
Sources: British Marine, Boaters & Boat Owners Survey 2021

Watersports & Outdoor Activity Combinations

It is clear from outdoor activity combinations that watersports and boating activities attracts a specific group of participants. Although participants' motivations vary, as we shall see in the segmentation slides later in this chapter (page 18), there is a common theme across this group: the search for adventure or escape, a physical and mental challenge and the rejuvenating feeling of being out in nature. As a result, other outdoor activities like hiking, mountain biking and snowsports appeal strongly to this group. With the high cost and emotional commitment of boat ownership and participation in sailing or power activities, outdoor activity combinations are generally more likely among paddlesport participants, with only **22%** participating in either canoeing / kayaking, rowing or stand up paddleboarding as their only activity.

	Outdoor Activities													
Watersports Activity	Fishing from a boat	Fishing not from a boat	Open Water Swimming	Snorkelling / Scuba Diving	Coasteering	Rock Climbing	Skiing / Snowboarding	Cycling / Mountain Biking	Horse Riding	Hiking / Rambling	Running / Jogging	Team Sports (e.g. football)	Tennis	Golf
Small sailboat racing	4%	1%	5%	4%	1%	1%	7%	25%	1%	20%	9%	2%	3%	5%
Small sailboat activities	9%	2%	3%	6%	1%	1%	8%	26%	1%	20%	12%	1%	2%	3%
Sail Yacht racing	8%	0%	4%	4%	0%	1%	11%	22%	1%	14%	6%	2%	4%	4%
Sail Yacht cruising	10%	1%	6%	6%	1%	1%	10%	22%	1%	22%	7%	1%	3%	7%
Power boating	21%	3%	8%	9%	3%	0%	3%	13%	1%	10%	5%	1%	2%	8%
Motor Boating / Cruising	19%	5%	5%	6%	2%	1%	5%	16%	0%	18%	4%	1%	2%	7%
Canal boating	11%	4%	4%	6%	0%	1%	5%	19%	0%	25%	6%	1%	2%	8%
Canoeing / Kayaking	10%	2%	6%	7%	1%	1%	5%	28%	1%	21%	10%	1%	3%	4%
Rowing / Sculling	9%	3%	4%	5%	2%	1%	8%	26%	1%	23%	6%	2%	4%	5%
Stand Up Paddleboarding	8%	1%	8%	6%	0%	0%	10%	27%	1%	20%	12%	2%	4%	5%

Note: highlighted figures represent salient statistics for the reader.



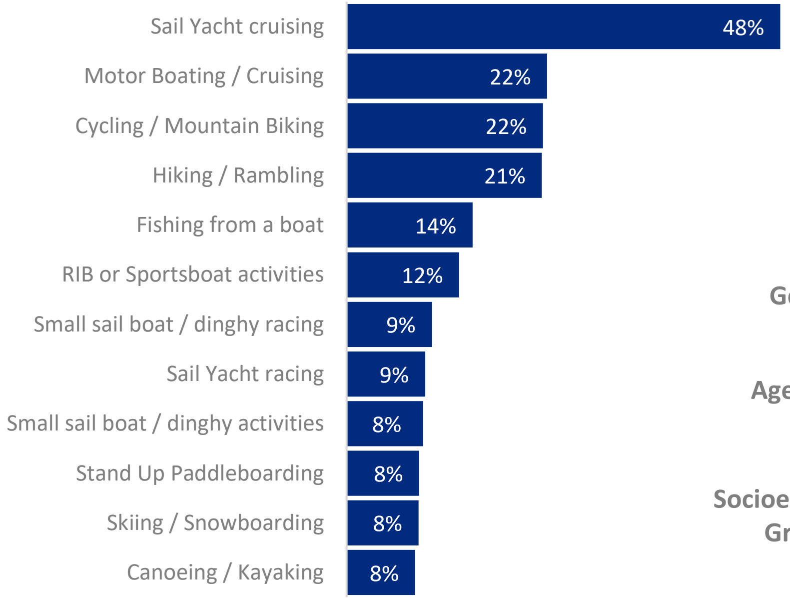
Sources: British Marine, Boaters & Boat Owners Survey 2021

Watersports & Outdoor Activities Compared

Boating and watersports compare favourably with their main competitor outdoor activities in terms of demographics. Participation across age groups and classes are similar, albeit in much smaller volumes. Paddlesports, with their mobility, flexibility and low costs, even has a comparable share of public participation to other outdoor activities, after accounting for the disadvantage of water access requirements. However, the greater infrastructure, water access, equipment and knowledge requirements of more complex boating activities put them at a disadvantage with sports like cycling and hiking and are not fair comparisons.* It should be remembered that these boating activities are highly unique, providing a distinct lifestyle, with distinct physical, social and emotional benefits, which can’t be replicated by those other activities, but is often complimented by those lower cost cardio sports.

**A fairer comparison for boating activities that involve high equipment costs, technical and safety knowledge and access requirements and have the benefits of physical and mental challenge and nature-based adventure experiences might be airplane flying, quad biking, motocross or another mechanical operator-based activity.*

All Outdoor Activities participated in by Watersports Participants (%)



Demographic Profiles of Watersports & Key Outdoor Activities

		Sailing Activities	Powerboat Activities	Paddlesports Activities	Cycling for Leisure	Hiking / Rambling	Climbing / Bouldering	Fell Running	Skiing / Snowboarding
	Participation (millions)	2.59	5.45	4.72	13.3	10.4	0.45	0.80	1.24
Gender	Male	62%	56%	58%	56%	53%	66%	69%	57%
	Female	38%	44%	42%	44%	47%	34%	31%	43%
Age Group	16 to 34	60%	49%	56%	36%	39%	71%	41%	40%
	35 to 54	28%	30%	34%	37%	33%	22%	47%	38%
	55+	11%	21%	11%	27%	28%	7%	11%	22%
Socioeconomic Group	AB	50%	43%	44%	35%	38%	40%	46%	48%
	C1C2	35%	42%	39%	47%	45%	41%	44%	42%
	DE	15%	15%	17%	18%	17%	19%	9%	9%

Note: highlighted figures represent salient statistics for the reader.

Source: British Marine, Boaters & Boat Owners Survey 2021; Watersports Participation Survey 2020; Sport England Active Lives Survey 2020

Watersports & Outdoor Activity Segmentation Profiles

With the overlap between boating and other outdoor activities, boating and watersports participants segments share many of the same characteristics as broader outdoor activity participants. They crave outdoor exploration, physical adventure and personal challenge, whilst at the same time valuing social connections and cultural associations related to their activities.

Watersports Segments (market share %)

Mindful Masters (17%)
Will be a long-term participant, committed to their activity over many years. Motivated by the personal challenge and mastering the skills of their activity.

Relaxing Getaway (16%)
Will try multiple activities before settling on a single activity. Motivated more by escape, social connection and well-being than fitness and personal challenge.

Social Challenge (26%)
Like to try multiple activities, often with likeminded people. Driven by the physical experience and personal challenge, often as part of a social experience.

Instagrammer (11%)
Mainly younger people participating in activities that can maintain fitness while giving them social recognition. Motivated by the lifestyle of their chosen activity.

Try Anything (30%)
Highly active group, participating in multiple sports. Sometimes participate alone, but often in a group. They like the fitness, lifestyle, social connection as well as competitive nature of exercise.

Outdoor Activity Segmentation Profiles (market share %)

The Challenger (21%)
Puts their body on the line. Pushes self and focused on personal achievement/ reaching a goal.

The Explorer (33%)
Sense of being part of and exploring the natural world. Physical activity is driven by emotional purposes and revolves around exploring and learning.

Fitness in Nature (17%)
Chooses to keep fit outdoors for the fresh air and freedom. Prefers to be exercising outdoors and generally doesn't like the gym or indoor sports.

The Tribe Member (9%)
Committed to their sport or activity and take it very seriously. Training and skill improvement is important, as is competing.

The Adventurer (7%)
Enjoys the sense of adventure and pushing themselves physically. Personal achievement as well as social connection is important.

The Learner (7%)
Primary purpose of visit to outdoors is for learning/ personal development, physical activity is used as a means by which to learn.

The Thrill Seeker (3%)
Enjoys taking part in extreme sports and other activities involving physical risk. The experience is all about the adrenaline rush.

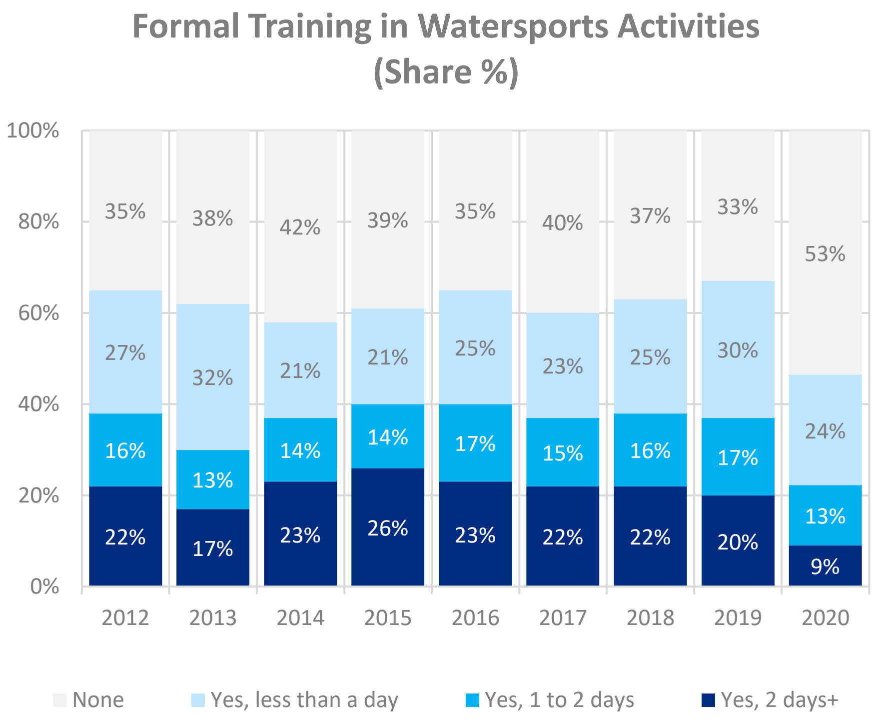
The Freestyler (4%)
Predominantly young people who are motivated to take part in alternative freestyle sports for the lifestyle and culture that's associated with it.

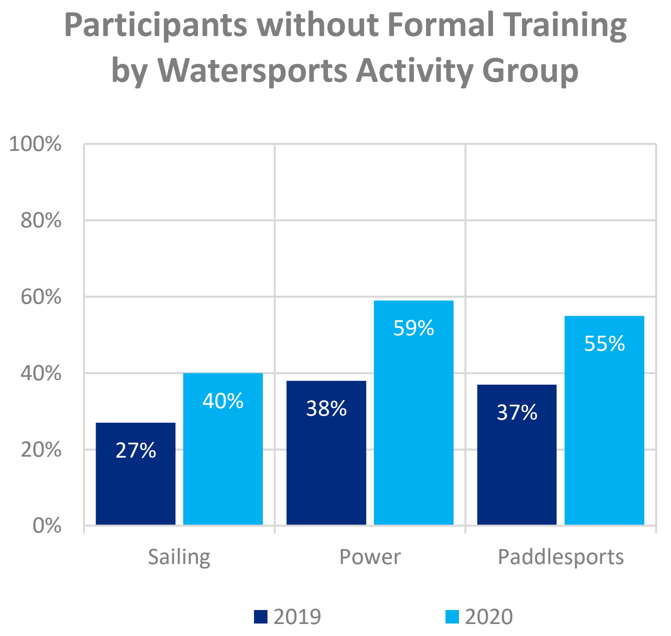
Sources: British Marine, Future customers (2017); OIA / Sport England, Getting active outdoors (2015).

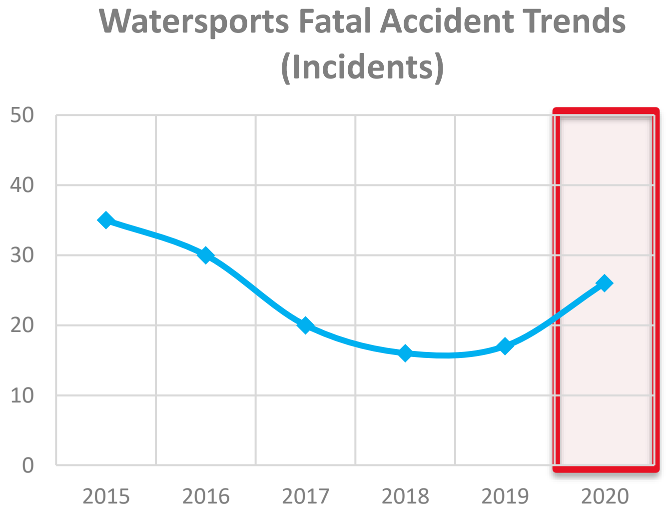
Boating & Watersports:
Tuition & Entry to Watersports

Trends in Formal Training

Trends in formal training indicate that until COVID-19 struck, minimum levels of training were consistent. Prior to the pandemic, only a third of participants had had no formal training before participating in a boating or watersports activity. However, in 2020 the numbers of inexperienced and untrained participants increased dramatically from **33%** to **53%,** coinciding with a sharp increase in non-fatal and fatal watersports accidents during COVID-19, according to both Water Incident Database (WAID) accident data and anecdotal evidence from local authorities.





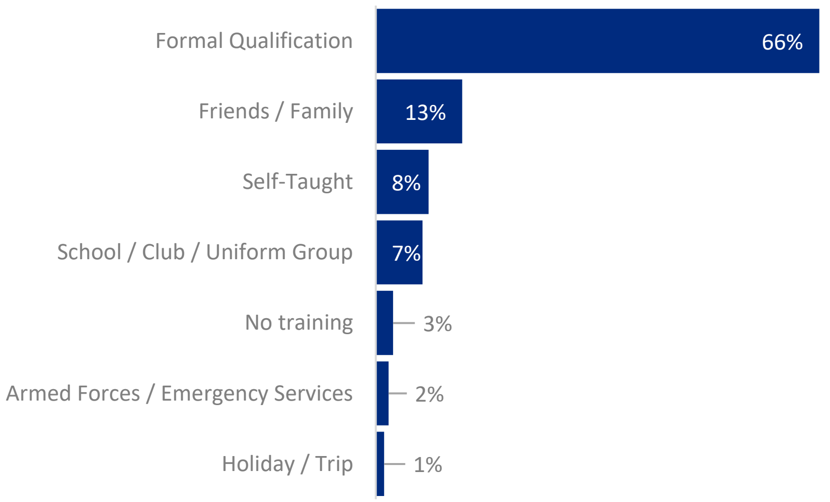


Sources: British Marine, Watersports Participation Survey 2020; Water Incident Database (WAID) Annual Fatal Incident Reports, 2015-20

Types of Formal & Informal Training

Formal qualification through the RYA continues to be the most popular form of training, followed by informal coaching by friends or family. Self-education through both offline – books, magazines – and digital – online blogs, videos – resources were also a key method of learning. Overall, survey results indicated that training is a continuous, evolving process. Most participants used a mixture of these methods as they expanded their knowledge and skills over many years, supplementing the base skills from informal coaching or uniform groups with self-education and eventually certifying this knowledge through the acquisition of formal qualifications.

Primary Method of Training (%)*



Method of Training by Demographic

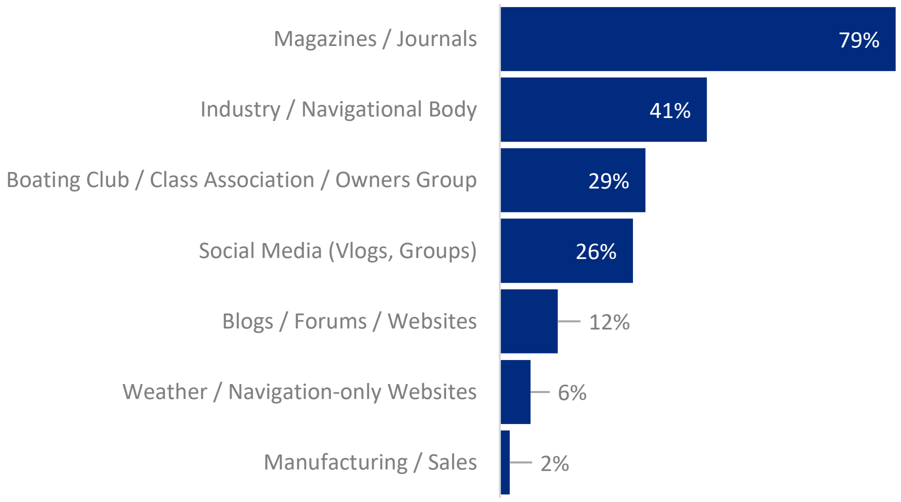
		No Training	Self-Taught	Friends / Family	Holiday / Trip	Schools / Club / Uniform Group	Forces / Emergency Services	Formally Qualified
Gender	Male	74%	89%	80%	70%	89%	96%	87%
	Female	26%	11%	20%	30%	11%	4%	13%
Age Group	16 to 34	3%	2%	3%	-	4%	-	1%
	35 to 44	3%	-	7%	15%	7%	-	3%
	45 to 54	8%	23%	19%	20%	14%	26%	15%
	55-64	13%	35%	36%	45%	34%	26%	39%
	65+	38%	40%	36%	20%	41%	48%	42%
Income	Under £25,000	12%	14%	9%	23%	9%	12%	7%
	£25, 000 to £50,000	36%	34%	23%	31%	30%	29%	26%
	£50, 000 to £75,000	24%	26%	26%	15%	21%	35%	21%
	£75, 000 to £100,000	16%	7%	14%	-	18%	12%	14%
	£100, 000 or more	12%	18%	28%	31%	23%	12%	32%

Source: British Marine, Boaters & Boat Owners Survey 2021

Educational Resources: Magazines, Websites & Social Media

Magazines and journals are the most popular resource used by participants to maintain their skills and awareness of the latest trends related to their activity, particularly among older participants with specialist hobbies and craft. News and informational content published by industry bodies like the RYA are also important, providing practical updates relevant to boating environments and trip planning. For boat owners, sailing clubs, boat owners' forums and class associations are another key resource for accessing important information and sharing experiences regarding specific vessels or boating areas. Use of online blogs and social media (e.g. YouTube video blogs, Facebook groups) is another valuable means of self-education favoured by younger and middle-aged participants, with content ranging from tutorials and video reviews of the latest vessels, to video blogs of round-the-world sailing passages.

Educational Resources by Grouping (%)*



Source: British Marine, Boaters & Boat Owners Survey 2021

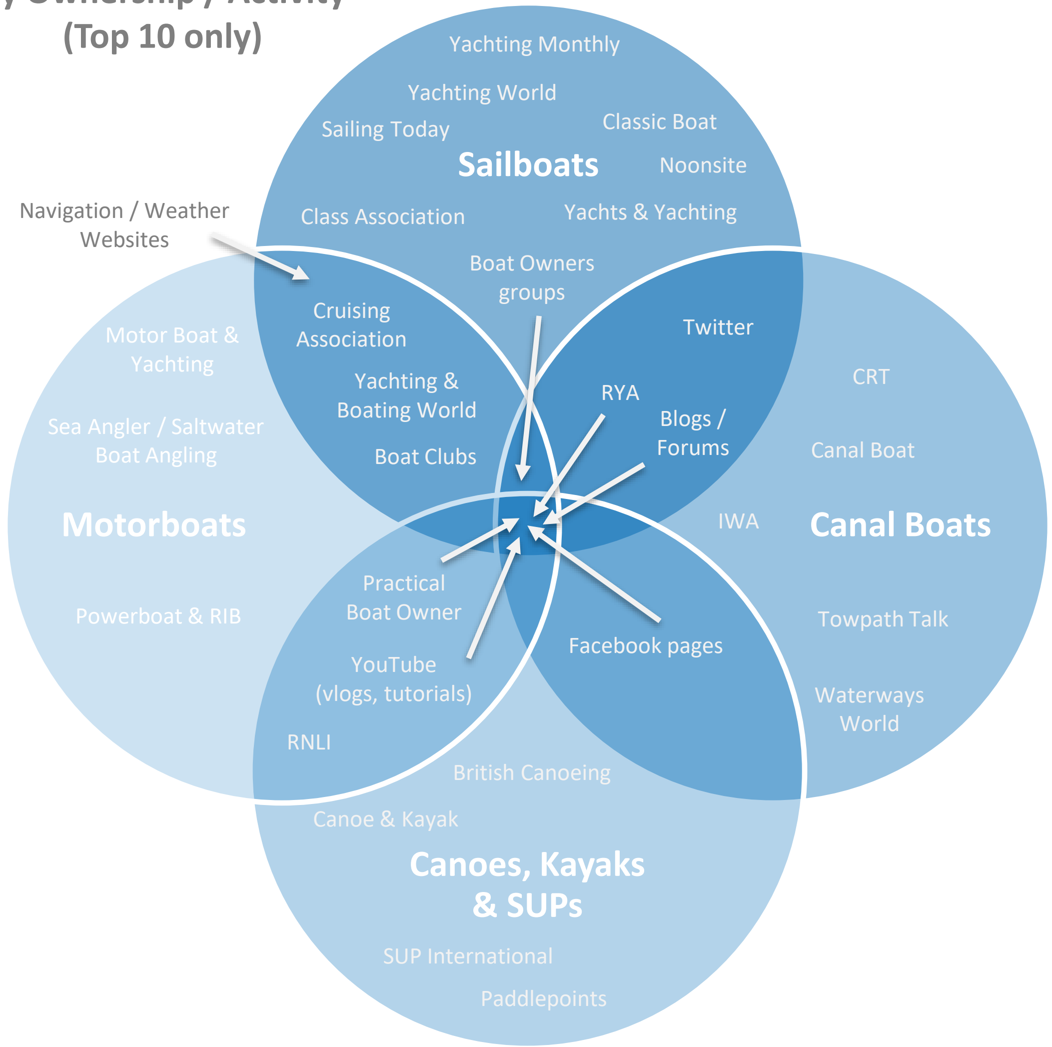
Educational Resource Use by Age Group & Key Activity (Share %)

		Magazines / Journals	Industry / Navigational Body	Club / Class / Owners Group	Social Media	Blogs / Forums / Websites	Weather / Navigation-only
Age Group	16 to 34	65%	-	-	10%	21%	-
	35 to 44	77%	15%	3%	13%	10%	-
	45 to 54	78%	16%	7%	15%	7%	2%
	55-64	79%	16%	10%	14%	6%	3%
	65+	81%	20%	17%	8%	3%	2%
Activity	Sailing	79%	35%	36%	25%	14%	6%
	Powerboating	79%	48%	20%	25%	7%	6%
	Canalboating	82%	89%	8%	54%	10%	-
	Paddlesports	53%	30%	-	39%	10%	-

Note: highlighted figures represent salient statistics for the reader.

Educational Resources: Magazines, Websites & Social Media

Overlaps in Educational Resources By Ownership / Activity (Top 10 only)



Yacht sailing has a culture dominated by long-distance cruising. Prominent sailing journals lead the resources used by yacht sailors, followed by weather and yachting news websites used for passage planning. There is a degree of overlap with motorboat enthusiasts, with larger motor yacht owners using similar cruising clubs, journals and weather and navigation websites to plan their routes. But with the greater connection between motorboating and sea angling, fishing plays a prominent role among motorboating enthusiasts, too.

In contrast, canal boating has a very distinctive sub-culture with very little overlap between motor or sail yacht cruising. While inland motorboat enthusiasts will use some canal boating journals for news and information relating to the UK's inland waterways, the vessels, lifestyle and communities of canal boaters do not interact with other activities. Similarly, watersports (canoeing, kayaking and paddleboarding) enthusiasts have a very different culture, with the difference in craft, physicality and participant, and therefore use very different resources that do not crossover to boating activities.

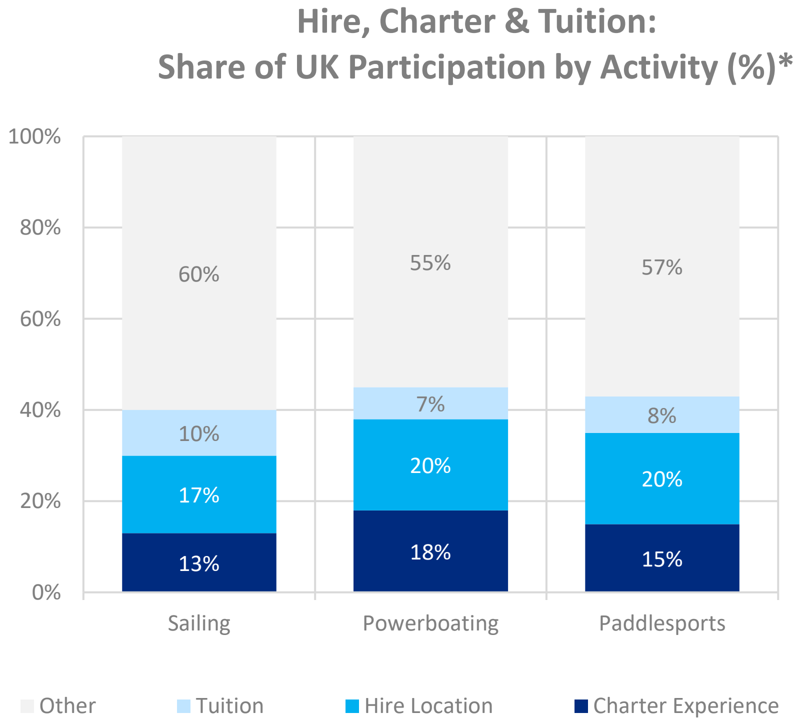
However, there is a significant overlap between all activities in their use of navigational bodies for practical information related to their activities, but also social media pages like Facebook, Twitter and YouTube. These forums provide a space to access information, share experiences and participate in communities of enthusiasts that can sometimes even bridge the divide between activities.

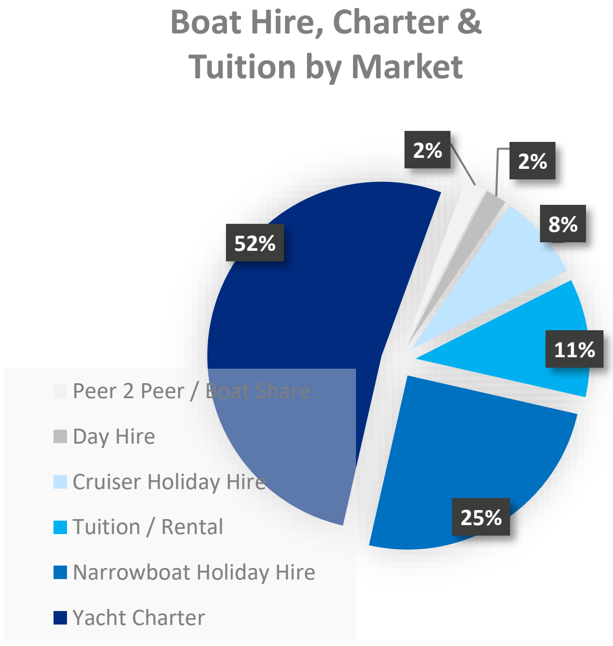
Source: British Marine, Boaters & Boat Owners Survey 2021

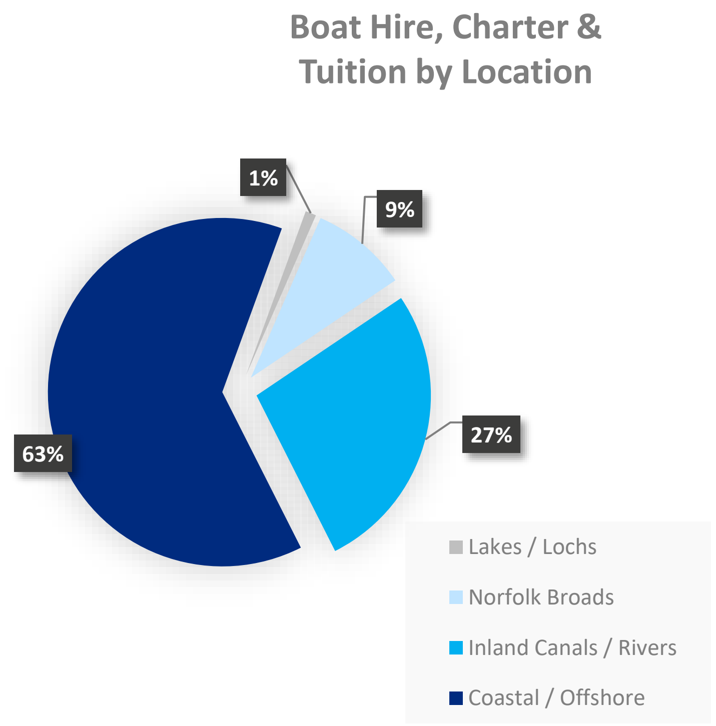
Hire, Charter & Peer-to-Peer Trends

Hire, Charter & Peer-to-Peer Participation

Participation in watersports through hire, charter or tuition accounts for over **40%** of activities participated in the UK. Yacht charter accounted for most of these experiences, followed by inland holiday hire on narrowboats or motor cruisers, with day hire only accounting for a sliver of the overall market. With the predominance of yacht charter, coastal or offshore locations dominates participation, followed by the inland canals network and the Norfolk Broads.







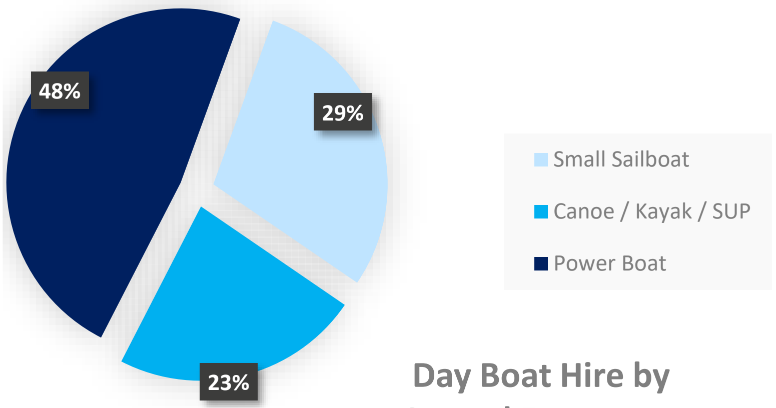
**Responses to the question "Which of the following best describes how you participated in your main watersports activity last time you participated?" ("Other" includes private ownership)*

Source: British Marine, Internal Economic Data; British Marine, Watersports Participation Survey 2020; British Marine, Boaters & Boat Owners Survey 2021

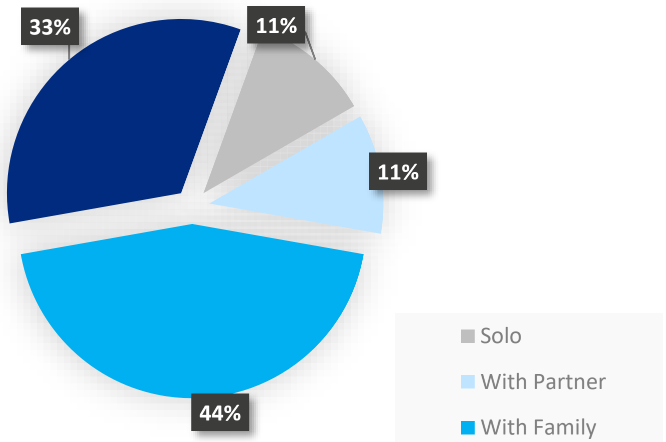
Day Boat Hire Trends

Day boat hire - ranging from canoes and kayaks to paddle the Thames to electric and diesel-powered motorboats used on the Norfolk Broads, other inland lakes and rivers and coastal waters – is broadly popular across age, socioeconomic and participation groups. Most participate in small groups of friends or family, either once or several times a year, and small motorboats are the most popular craft for this kind of hire.

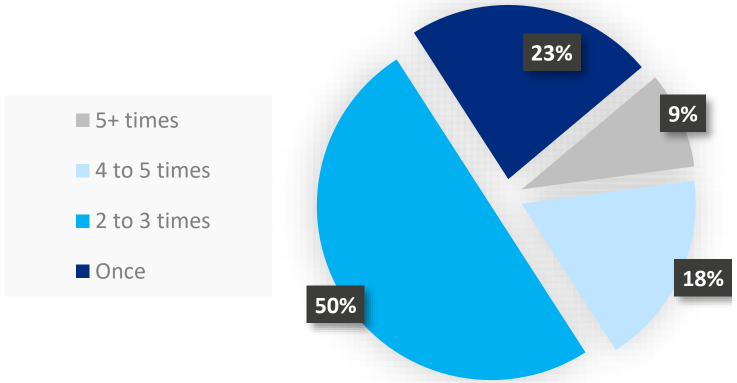
Day Boat Hire by Boat Type



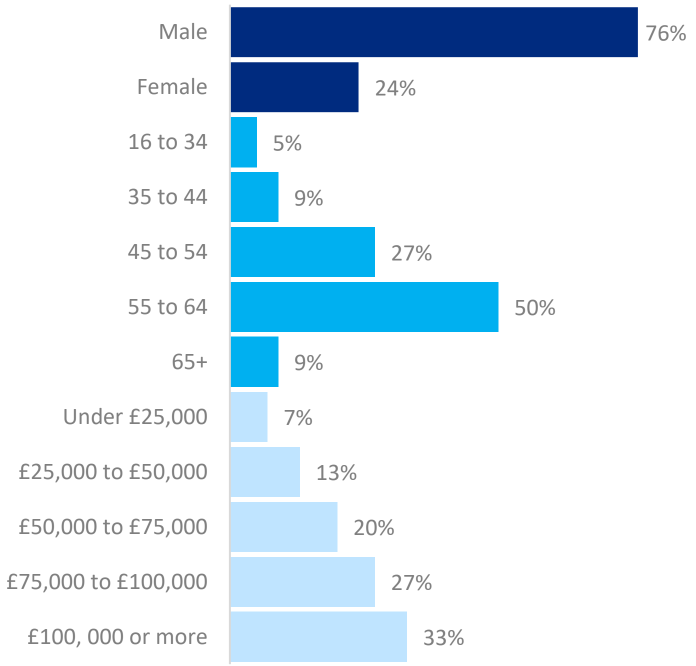
Day Boat Hire by Participation Group



Day Boat Hire by Annual Frequency



Day Boat Hire by Demographic (Share of Participants %)

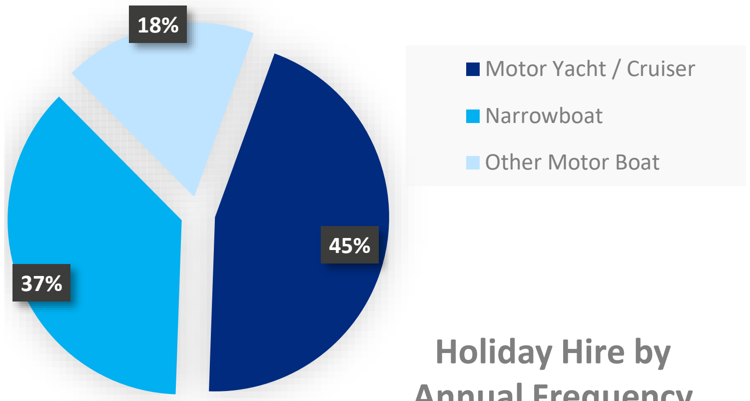


Source: British Marine, Boaters & Boat Owners Survey 2021

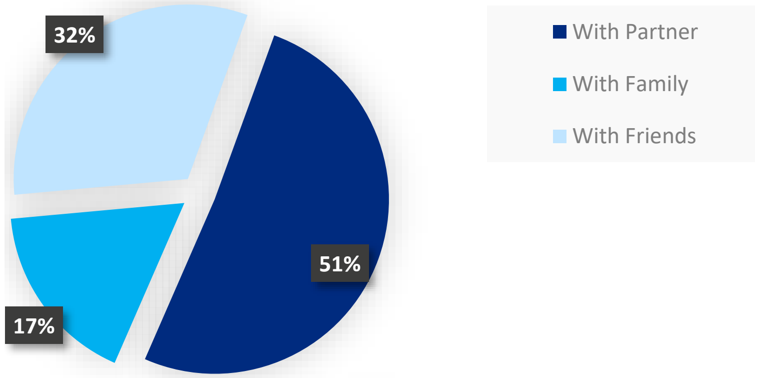
Holiday Hire Boat Trends

Holiday hire – consisting of overnight family cruising holidays aboard a range of different types of motorboats – accounts for the majority of inland hire experiences in the UK. The most common holiday experience includes overnight cruising on narrowboats along the UK's picturesque canal network, but renting of motor cruisers on the Thames, Norfolk Broads and other inland rivers is also popular. With the accessibility and affordability of this type of floating cottage holiday, these experiences are equally attractive to both lower and higher income participants, but predominantly older age groups and parties looking for a relaxed pace and a less technically challenging craft.

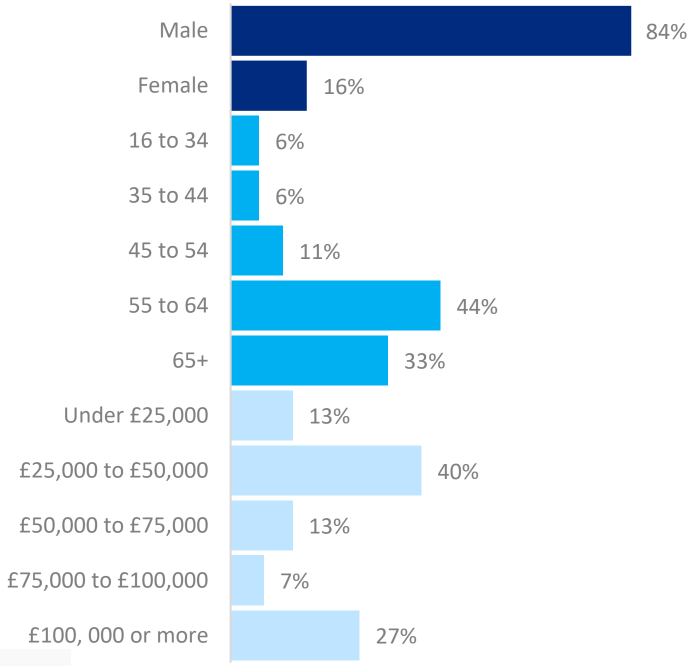
Holiday Hire by Boat Type



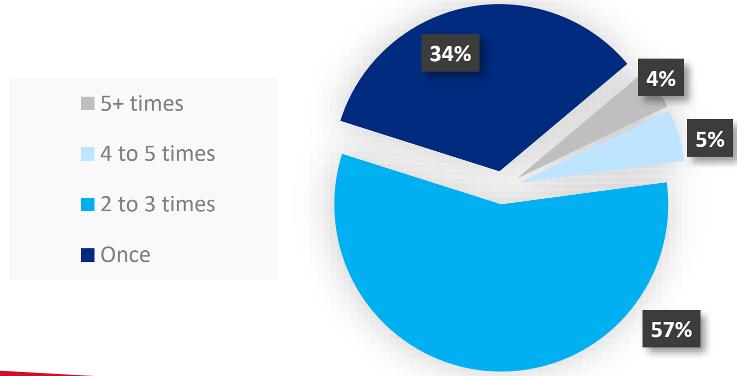
Holiday Hire by Participation Group



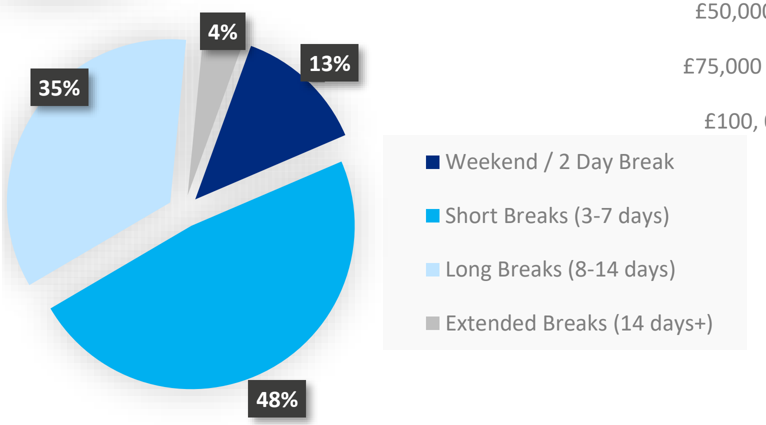
Holiday Boat Hire by Demographic (Share of Participants %)



Holiday Hire by Annual Frequency



Holiday Hire by Duration

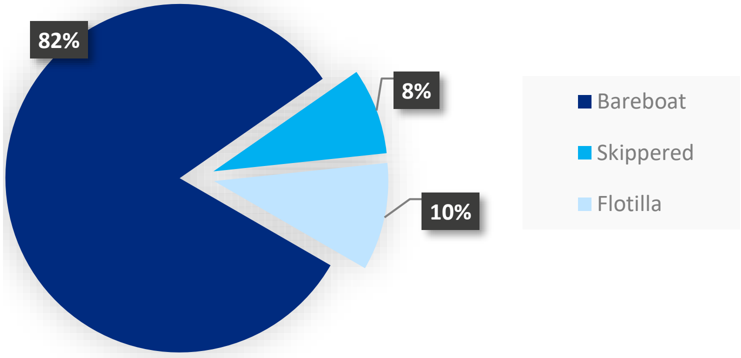


Source: British Marine, Boaters & Boat Owners Survey 2021

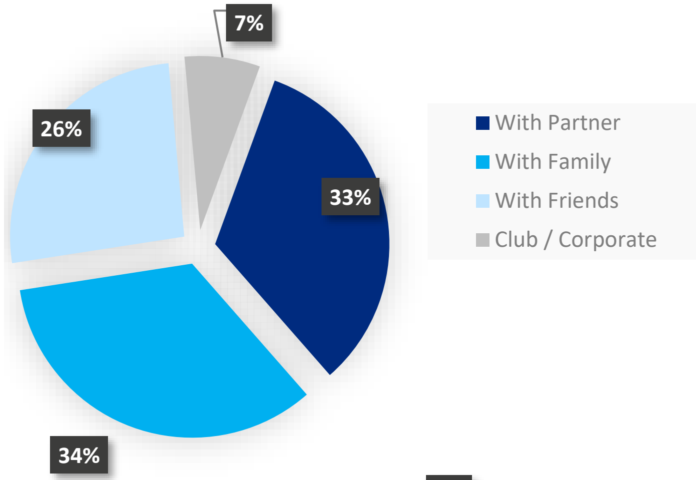
Sailing Yacht Charter Trends

Sailing yacht charter accounts for the majority of hire or charter experiences in the UK, with most participating in charter experiences outside the UK, primarily in the Mediterranean. Bareboat charters are most popular, giving participants the freedom to cruise independently, most often with friends and family on shorter breaks of less than 7 days (**67%**). With the independence, technical challenge and adventure element of yacht charters, these experiences attract a greater share of the younger boating market, with a third of participants under the age of 55.

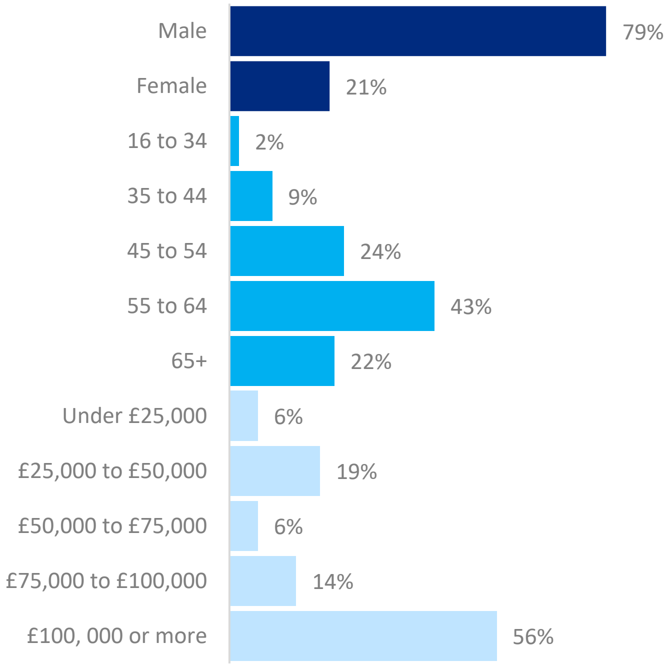
Yacht Charter by Charter Type



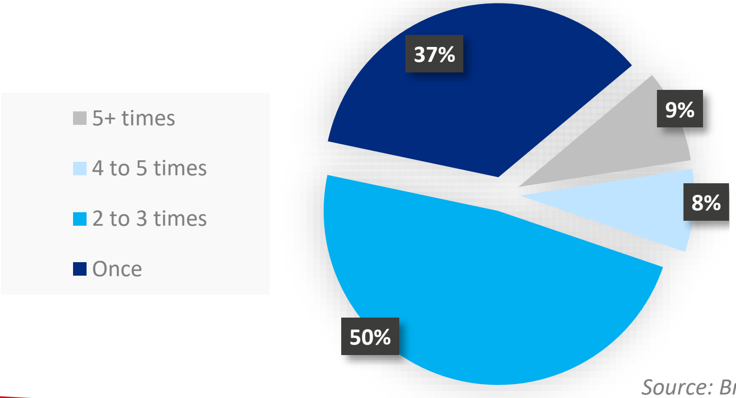
Yacht Charter by Participation Group



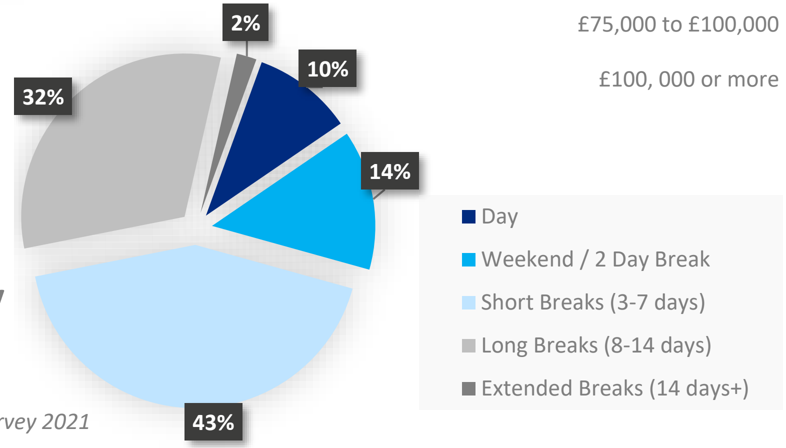
Yacht Charter by Demographic (Share of Participants %)



Yacht Charter by Annual Frequency



Yacht Charter by Duration

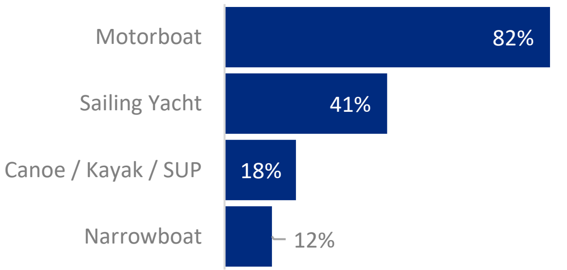


Source: British Marine, Boaters & Boat Owners Survey 2021

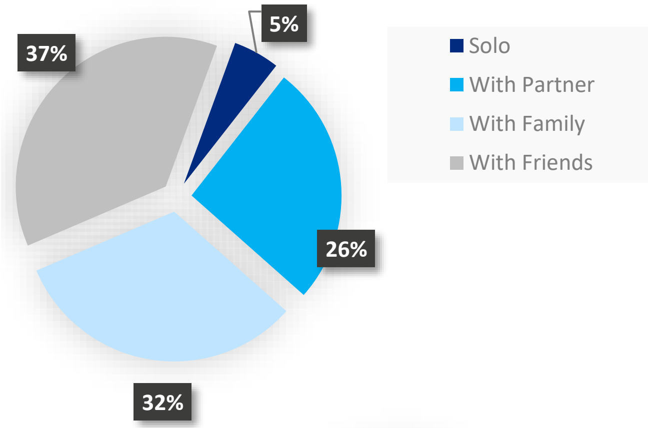
Peer-to-Peer / Commercial Boat Club Trends

Peer-to-peer rental of boats – e.g. Click & Boat – or use of annual subscription boat clubs – e.g. Freedom Boat Club – provide consumers with some of the most flexible and inclusive methods of participating, allowing a much greater share (over a third) of younger, lower income participants to take part in boating. However, uptake is still nascent, with only an estimated **5%** of non-boat owning participants using this method to participate in a boating activity. When participating, half or full day hires are most common (**56%**), either in couple, friend or family groups. With the subscription model of boat clubs, multiple rentals are common throughout the year, with small motorboats and rigid inflatables the preferred craft for subscribers to use.

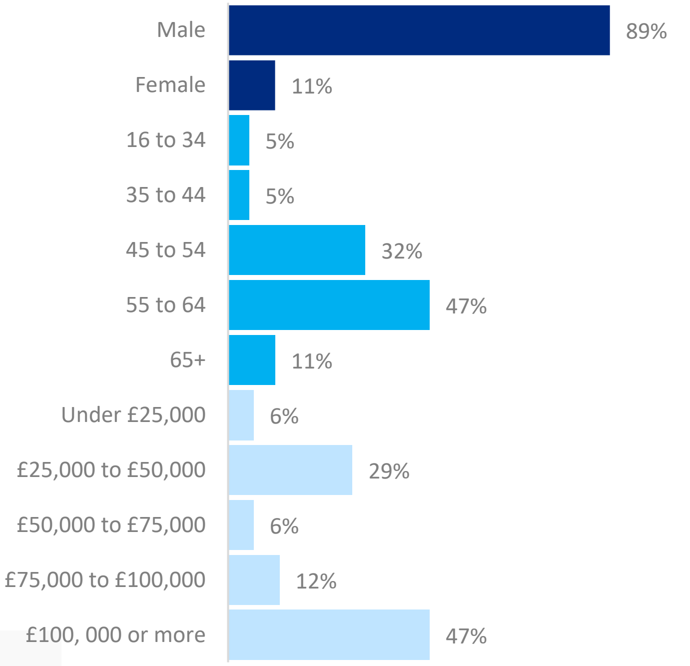
Peer-to-Peer / Club Rental by Boat Type



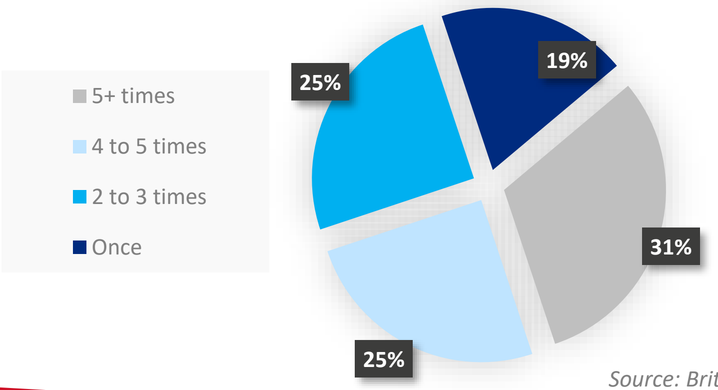
Peer-to-Peer / Club Rental by Participation Group



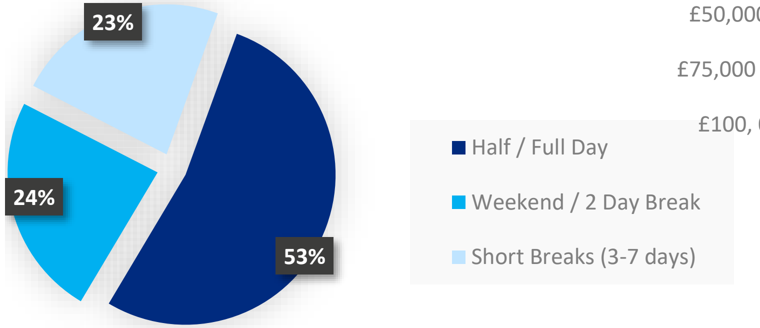
Peer-to-Peer / Club Rental by Demographic (Share of Participants %)



Peer-to-Peer / Club Rental by Annual Frequency



Peer-to-Peer / Club Rental by Duration

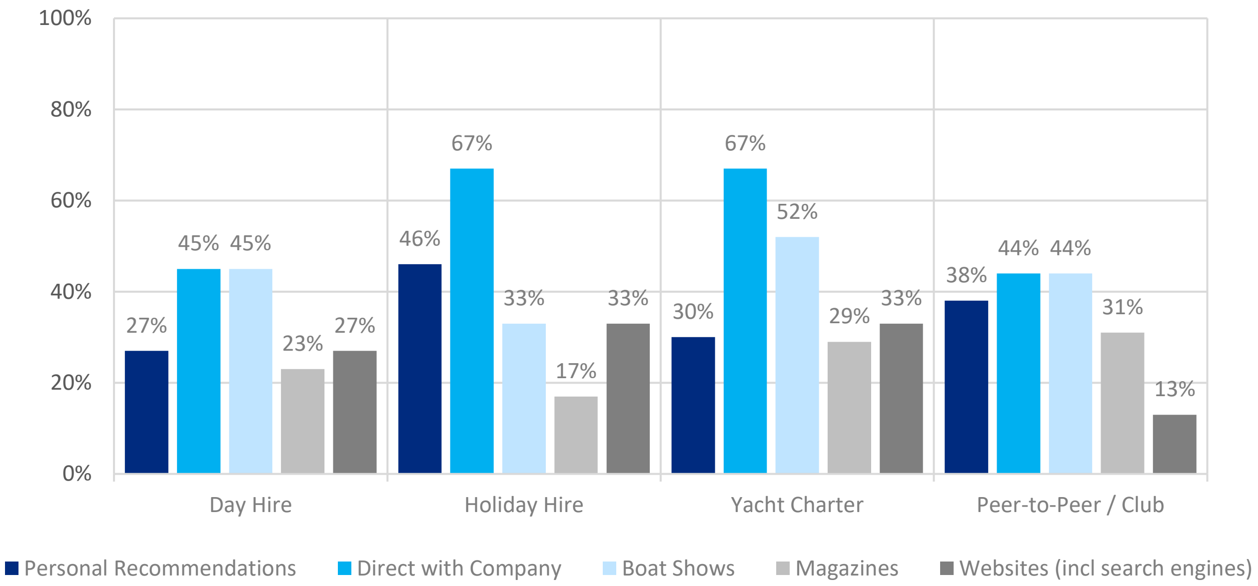


Source: British Marine, Boaters & Boat Owners Survey 2021

Purchasing Influences & Resources

Across hire types, the key influence on purchasing appears to be discussions direct with the hire or charter operator. With many yacht charter providers having a national presence and exhibiting at national boat shows, exhibitions also play a prominent role in the purchasing process, giving customers an opportunity to talk directly to multiple providers simultaneously. In contrast, in the smaller, more cottage-based market for narrowboat hire holidays and watersports rental, personal recommendations are more influential. Industry magazines, websites and social media are also important resources, with digital channels especially influential for younger consumers, but are all secondary to personal recommendations and dialogue with marine businesses.

Purchasing Resource Use by Participation Type (%)*



Purchasing Resource Use by Demographic (%)

		Recommendation	Direct with Company	Boat Shows	Magazines	Websites
	All responses	33%	59%	47%	26%	31%
Gender	Male	36%	58%	46%	28%	21%
	Female	14%	59%	55%	18%	32%
Age	16 to 34	21%	36%	36%	29%	50%
	35 to 44	31%	60%	37%	26%	29%
	45 to 54	32%	72%	36%	32%	16%
	55-64	35%	59%	63%	29%	35%
	65+	30%	52%	35%	17%	39%
Income	Under £25,000	38%	42%	38%	29%	25%
	£25, 000 to £50,000	42%	42%	37%	26%	26%
	£50, 000 to £75,000	29%	71%	48%	10%	38%
	£75, 000 to £100,000	31%	56%	58%	27%	29%
	£100, 000 or more	35%	54%	68%	32%	24%
Boat Owned	Sailboats	31%	61%	50%	28%	36%
	Motorboats	37%	56%	49%	28%	40%
	Narrowboats	45%	45%	27%	9%	45%
	Paddlesports	50%	50%	36%	36%	36%

Note: highlighted figures represent salient statistics for the reader.

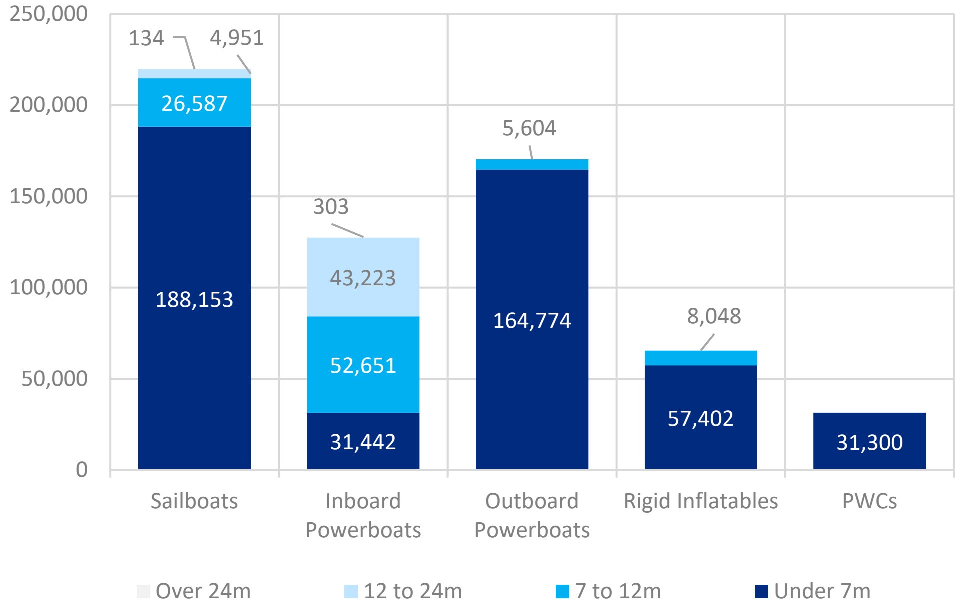
Source: British Marine, Boaters & Boat Owners Survey 2021

Boat & Watersports Craft Ownership: Trends & Demographics

UK Boat Ownership Trends

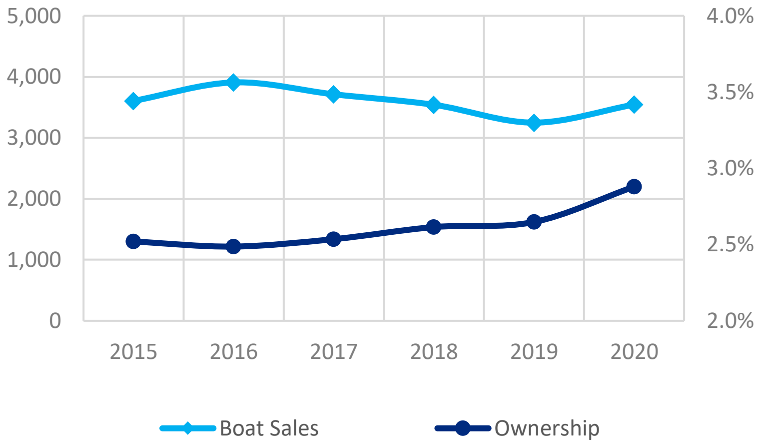
UK boat ownership is strongly weighted towards small sailboats and sailing yachts, followed by smaller outboard motorboats. New and used boat sales and overall ownership were slowing prior to the pandemic, due to an already overheating global economy, but the impact of COVID-19 led to a sharp increase in both sales and new boat ownership. Both brokerage boats and new boats – both imported brands and domestically-built models – have seen a sharp increase in sales since 2020, although supply chain challenges, surging inflation and the knock-on impact on household finances is beginning to dampen this growth.

UK Boat Ownership by Boat Type & Size (Share %)*



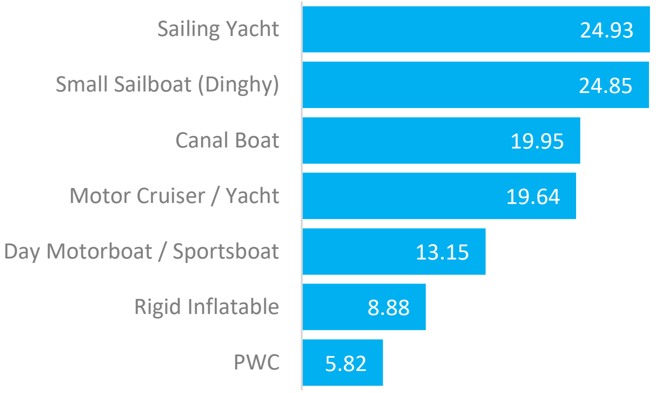
Excludes canoes, kayaks and stand-up paddleboards.

Boat Sales (units) & Boat Ownership Share Trends (%)*

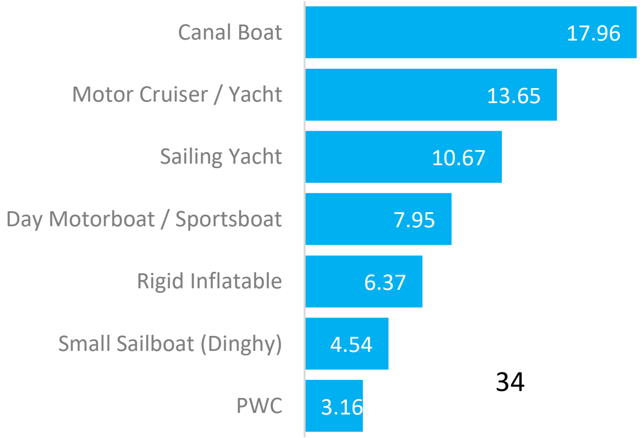


**Ownership share (%) represents the number of UK households that own any type of boat.*

Average Age of Boat by Boat Type (years)*



Average Length by Boat Type (m)*

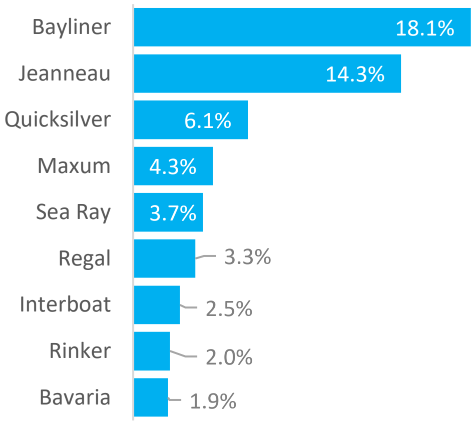


Sources: British Marine, internal economic data; British Marine, Watersports Participation Survey 2015-2020; British Marine, Boaters & Boat Owners Survey 2021; British Marine, Boat Sales Data Dashboard

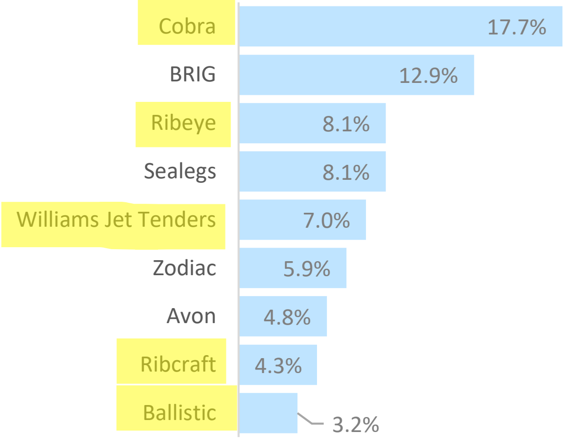
Boat Ownership by Brand

UK-built boats dominate the smaller, niche domestic markets, including the sailing dinghy, narrowboat – which is almost entirely composed of traditional British-built widebeam motorboats – and, to a lesser extent, rigid inflatable boat markets. With the UK's specialisation in luxury cabin cruisers, British brands are also popular in the luxury motor yacht segment. But British builders have a limited presence in the smaller sportsboat market, which is dominated by Jeanneau sportsboat models and US brands like Bayliner and Quicksilver. And while the UK industry has a strong yachting identity and building heritage, most sailing yachts in ownership are now European imports, reflecting the decline of British sailboat builders since the 1980s.

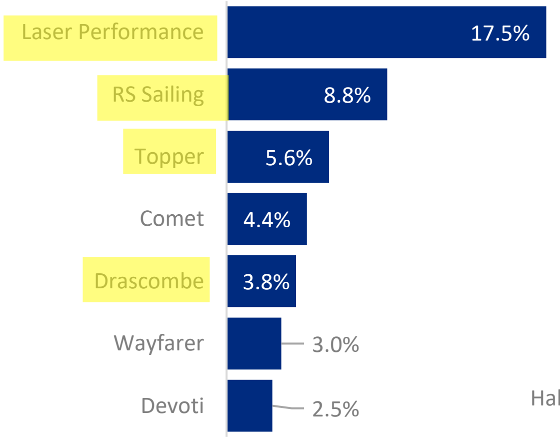
Small Motor Boats / Sportsboats



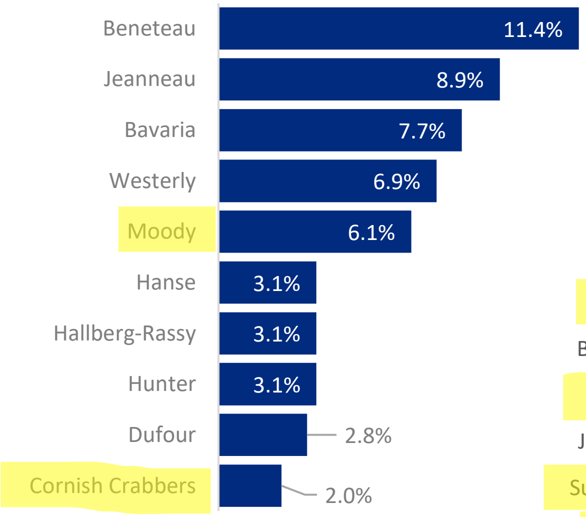
RIBs / Inflatables



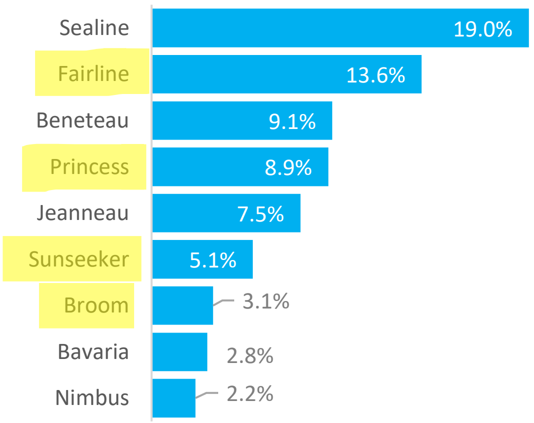
Sailing Dinghies / Small Sailboats



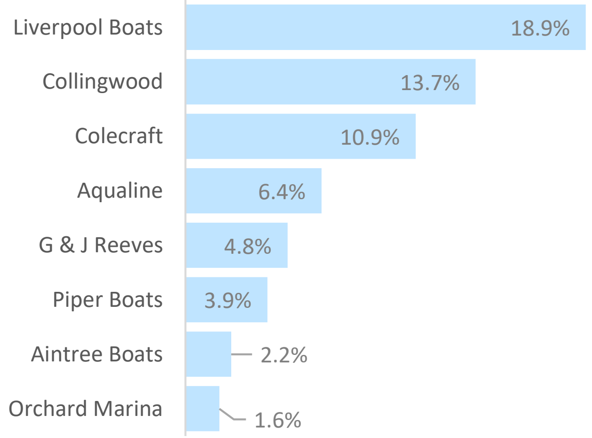
Sailing Yachts



Motor Yachts / Cruisers



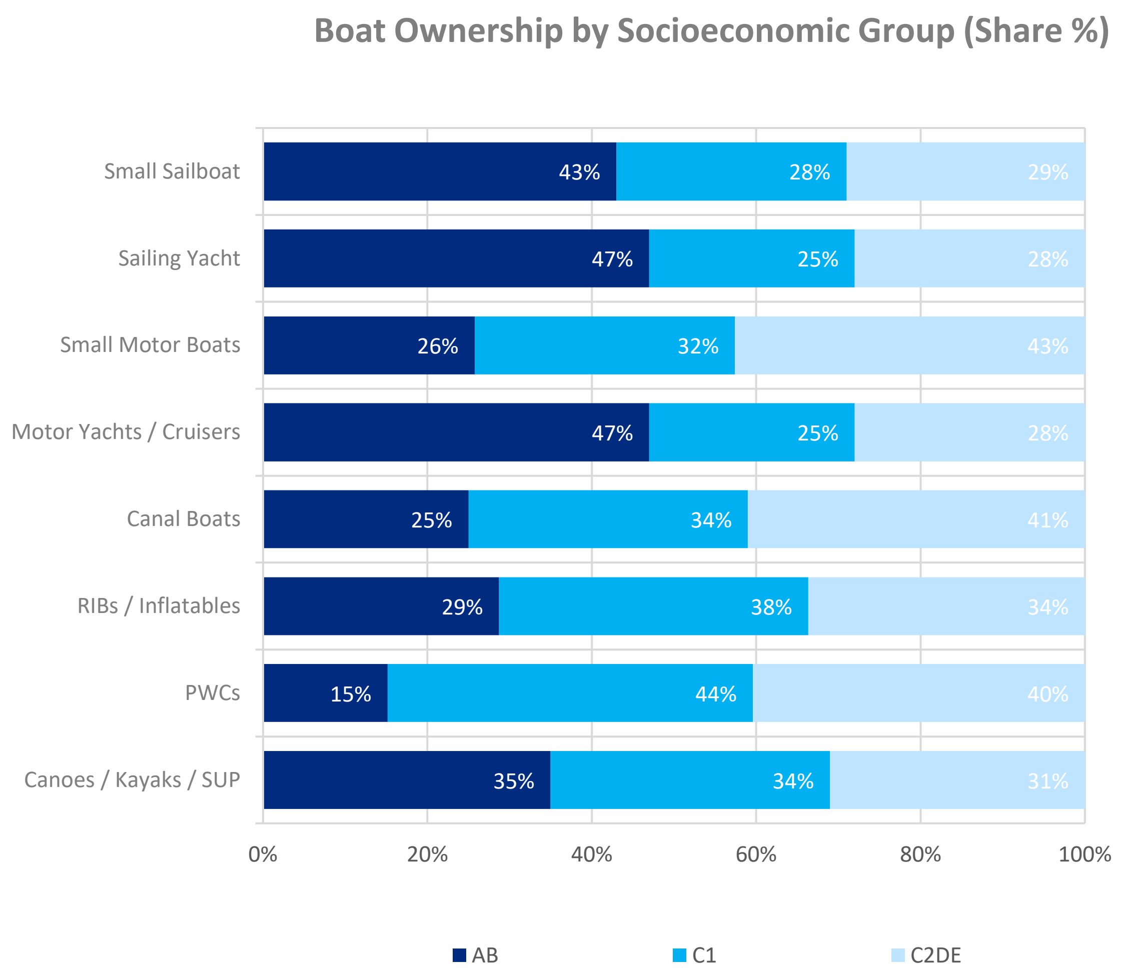
Narrowboats



Note: highlighted text represents key British brands.

Source: British Marine, Boaters & Boat Owners Survey 2021

Boat Ownership by Demographic



Source: British Marine, Watersports Participation Survey 2020

Boat owners predominantly fall within the upper middle-class “AB” socioeconomic group, composed of higher income professionals and higher managerial occupations (constituting approximately **4%** of the UK adult population), and the central middle-class “C1” group, consisting of junior managerial and professional occupations (constituting approximately **28%** of the UK adult population).

The highest proportion of owners in the “AB” socioeconomic group belong to the more expensive sailing yacht and motor yacht boat segments, with almost half of boat owners belonging to this social grade. This is unsurprising, given the financial barriers to larger boat ownership (see page 37), even used boats. Expenses can range from licenses and insurance to storage, maintenance and running costs, on top of the initial purchase, and can total tens of thousands of pounds annually.

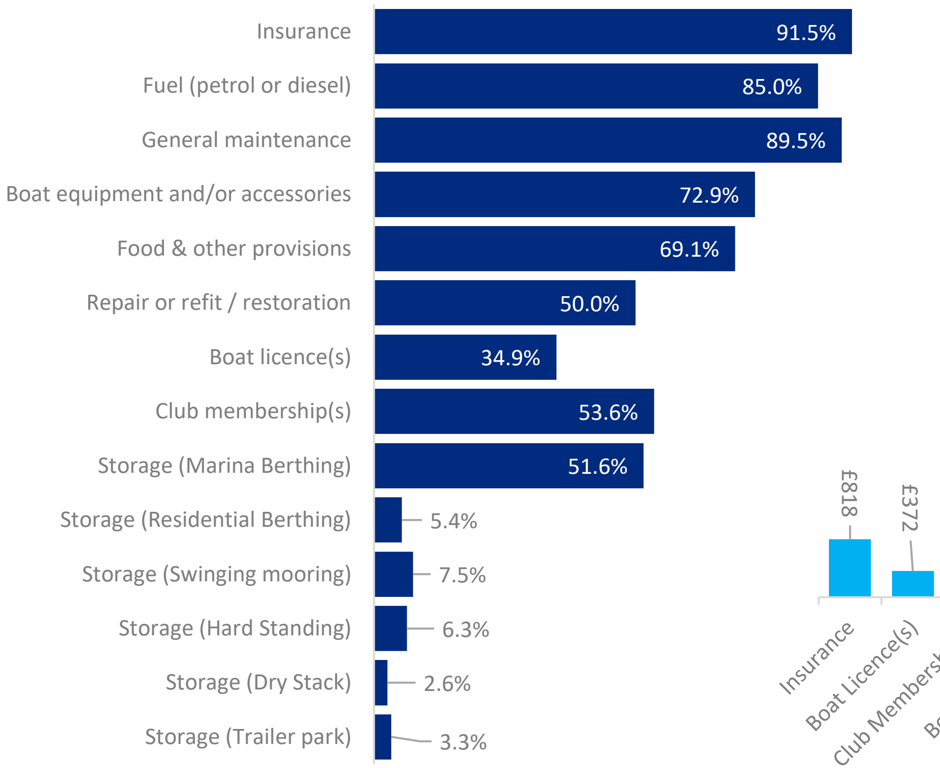
Smaller boats with more affordable operating costs – such as small motorboats, canal boats, rigid inflatable boats and PWCs (jetskis) – have a greater share of owners within the “C1” socioeconomic group. The share of ownership of these boats within this “C1” demographic ranges from **32%** for small motorboats to **44%** for PWCs. This also reflects the culture of boat ownership in these segments. These boat types are more inclusive, more accessible and easier to operate. They are tied less to luxury yachting and offshore cruising and instead place a focus on use for family leisure activities, including fishing, boat-based watersports (e.g. waterskiing) and inshore or inland cruising.

These are also the same segments with the greatest share of the “C2DE” socioeconomic group, which incorporates more working-class occupations – such as skilled and semi-skilled manual labourers – and pensioners. This is again indicative of the more inclusive culture of these boat types, particularly canal boating, which has always had a strong working-class following due to its industrial heritage. It also reflects their greater affordability, especially in the PWC segment, where models older than 5 years can cost less than £10,000 and have considerably lower operating costs than larger boats.

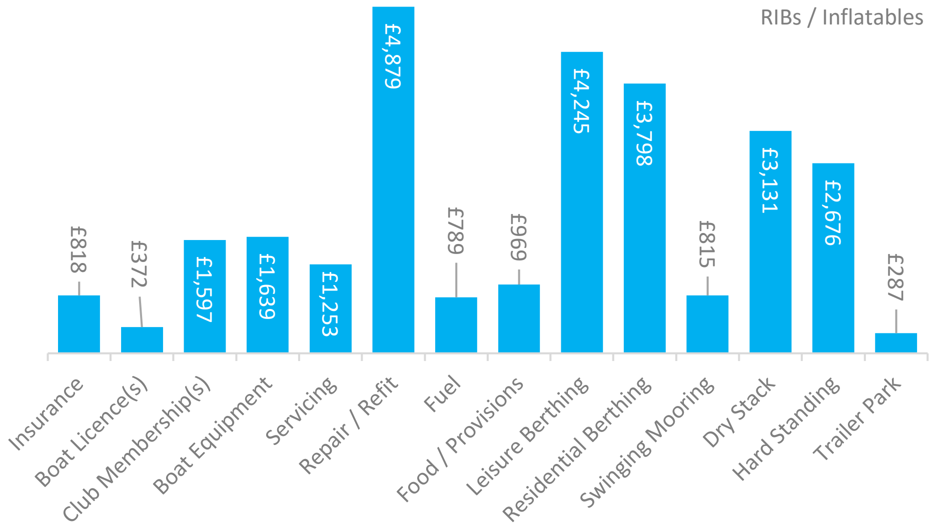
Boat Ownership Expenditures

Boat storage and boatyard services are the two largest costs across boat types, accounting for **over 50%** of annual expenses. Insurance averages about **8%** of expenses (**1.2%** the value of the craft), with club memberships and licenses adding to boat owners' administrative expenses. Food and other provisions when on the water accounted for **15-20%** of costs, averaging **£1,500** per year, across all boat types. Overall, average boat expenditures (excluding major repair projects) range from **£1,600** for a small sailboat or **£3,500-4,500** for a rigid inflatable, sportsboat or other day motorboat, to **£6,000** for a canal boat and up to **£11,000** for larger motor and sailing yachts.

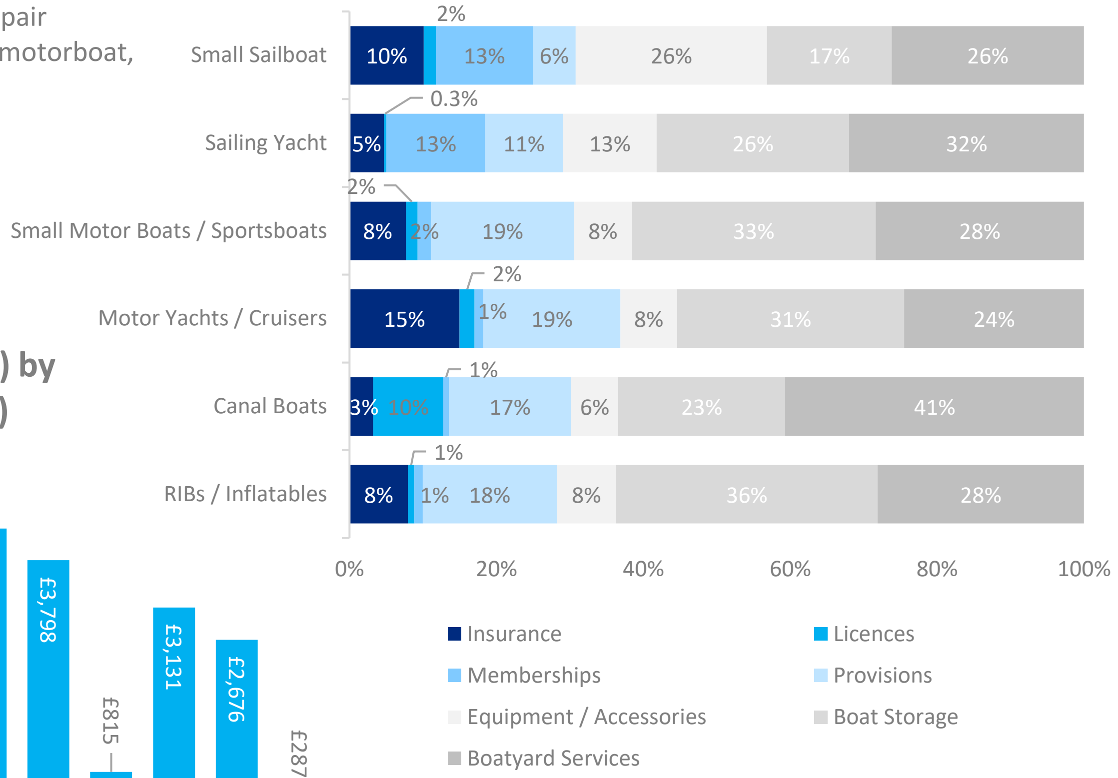
Boat Ownership: Primary Expenditures (Share %)



Average Cost (All Boats) by Expenditure Type (£)



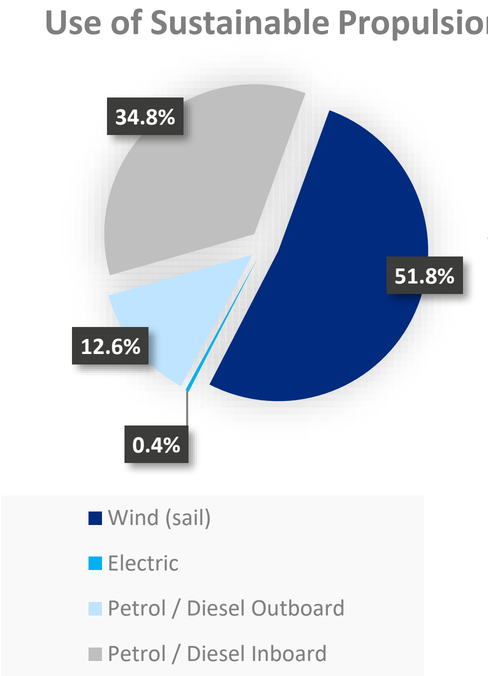
Distribution of Costs by Boat Type & Expenditure (%)

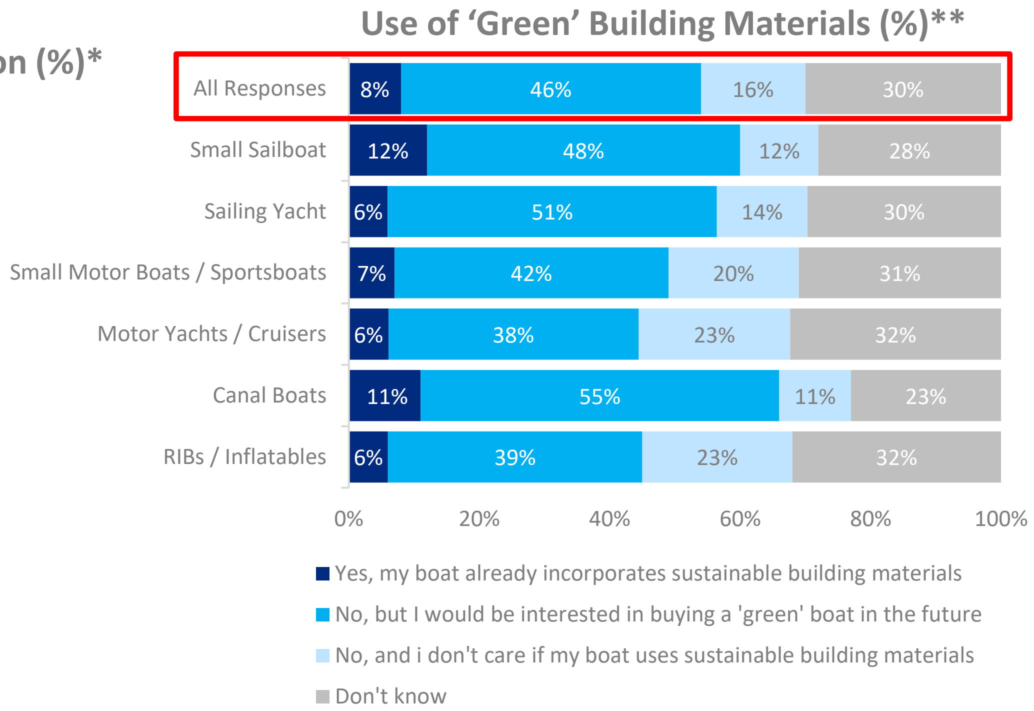


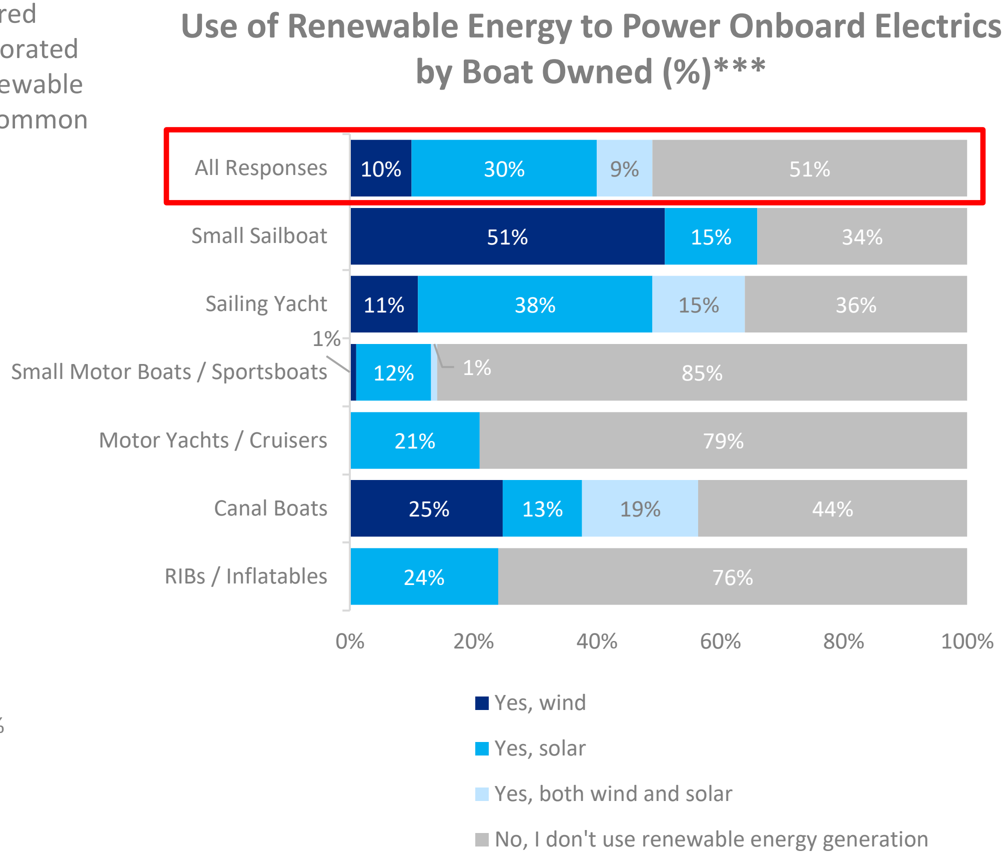
Source: British Marine, Boaters & Boat Owners Survey 2021

Environmental Impact Attitudes

Most boats owned in the UK are auxiliary sailing yachts – i.e. they are primarily powered by sail but incorporate a small marine engine for additional power –followed by inboard or outboard powered motorboats. Survey responses indicated little take up of newer hybrid or electric propulsion craft, although recent UK sales and licensing data suggests demand for electric-powered boats is increasing, particularly among Dutch-built electric tenders. **Less than 10%** of boats owned by respondents incorporated "green" building materials, although there is substantial interest in purchasing sustainable boats in the future. Use of renewable energy aboard boats is far more widespread, with half of owners adopting this technology, although uptake is far more common among long-distance cruising boats, such as sailboats or canal boats.





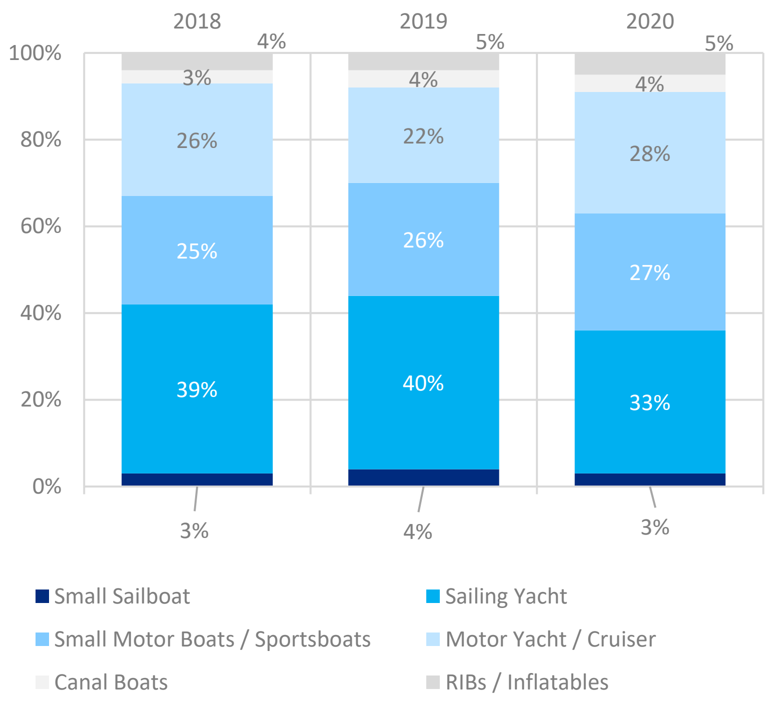


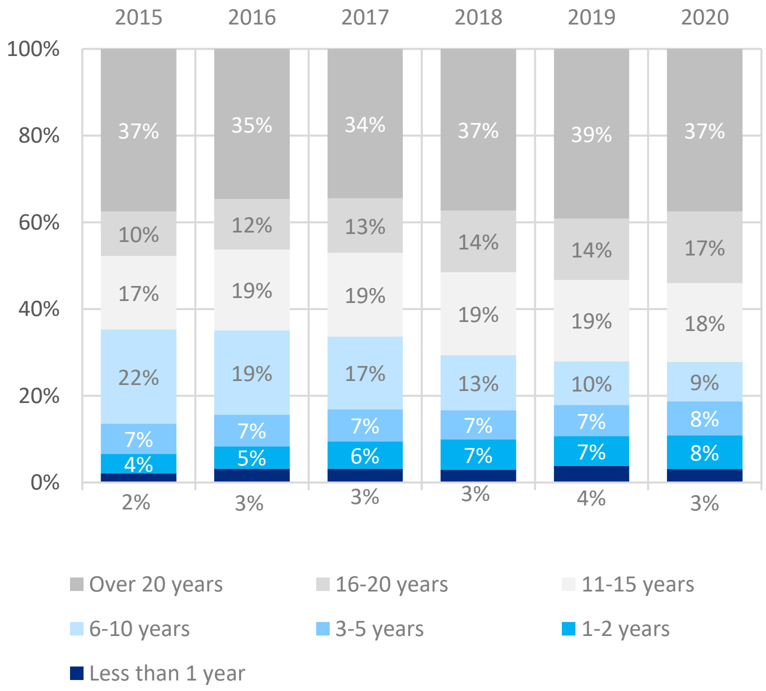
Source: British Marine, Boaters & Boat Owners Survey 2021

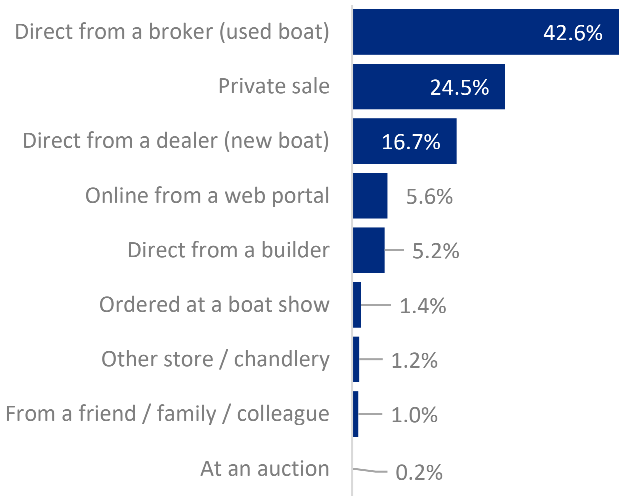
Boat & Watersports Craft Ownership: Purchasing Trends

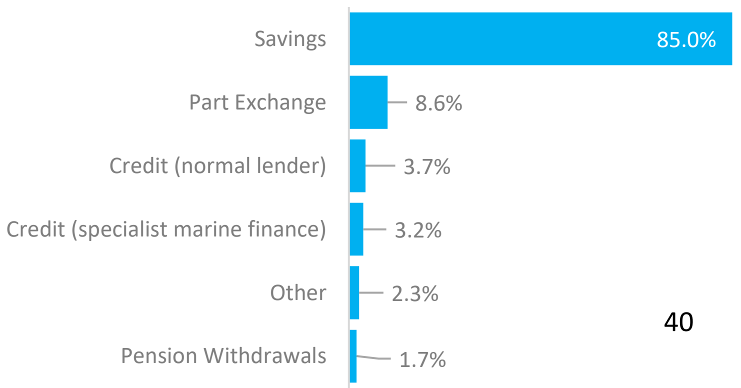
Boat Purchasing Trends: Past Sales

Sailing yachts account for the majority of new and used boat sales in the UK, followed by small motorboats used for fishing, watersports and cruising. The vast majority of boats sold in the UK are pre-owned, with **50%+** over 15 years old, with most being bought either direct from brokerages or through private sales, financed mainly through savings and part exchanges. Use of credit lenders, particularly specialist marine finance, is comparatively rare, accounting for **less than 10%** of boat purchases by survey respondents.







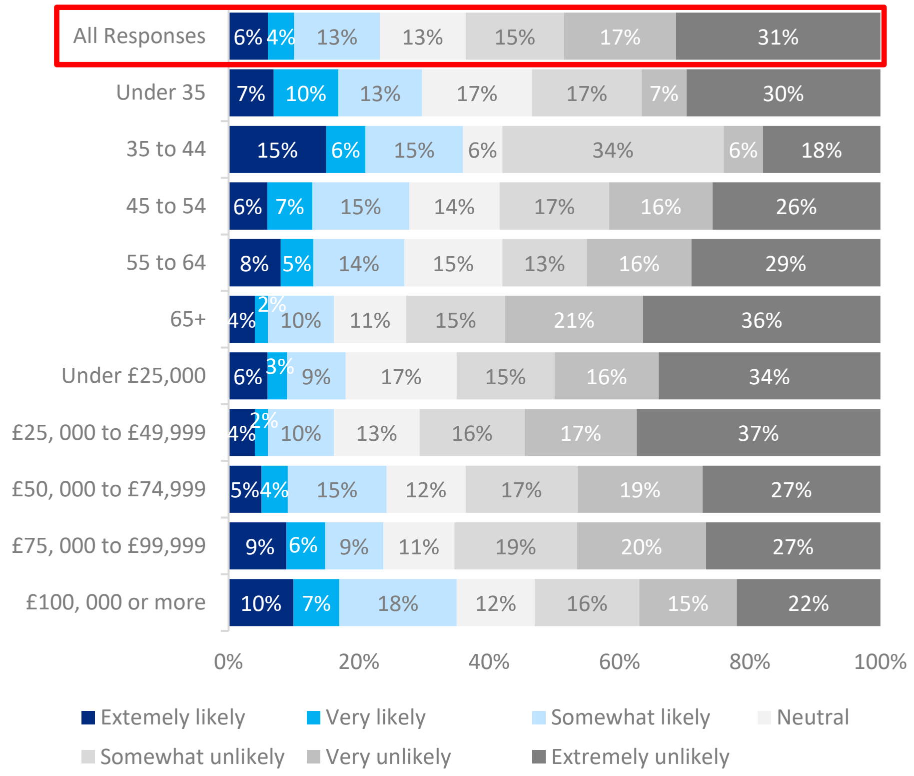


Sources: British Marine, Boaters & Boat Owners Survey 2021; British Marine, Boat Sales Data Dashboard

Boat Purchasing Trends: Future Sales

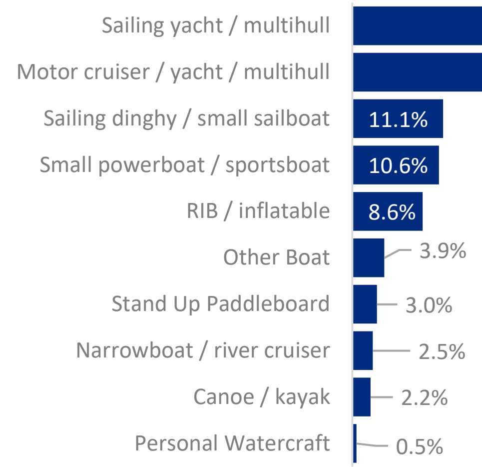
Just under a quarter (**23%**) of survey respondents indicated they were likely to purchase a new boat within the next 12 months, with interest inevitably concentrated in demographics with the greatest financial flexibility. Most are looking at used sailing yachts or motor cruisers. Boat shows continue to be the main resource for browsing brands, followed by reviews in boating journals or personal recommendations.

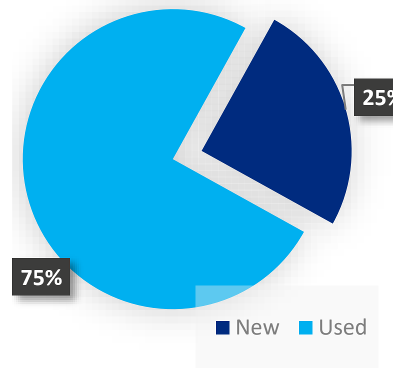
Likelihood to Buy within the next 12 Months by Demographic (%)*



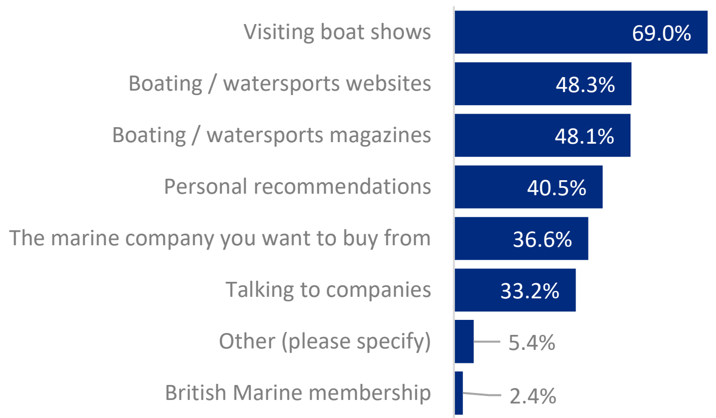
** Based on responses to the question "How likely are you to buy a new or used boat / watersports craft **in the next 12 months**?"*

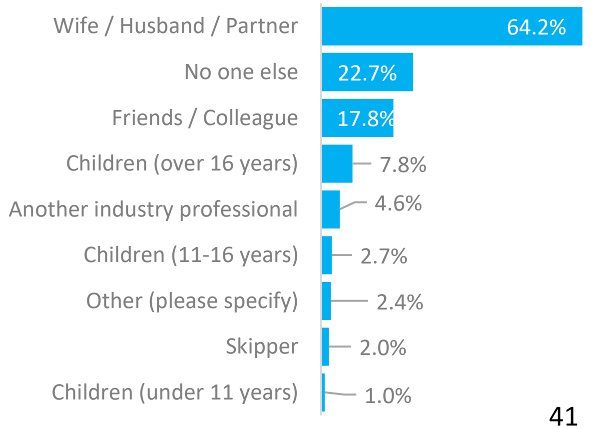
Types of Boat Prospective Buyers are Interested in (%)





Key Influences on Purchasing (%)



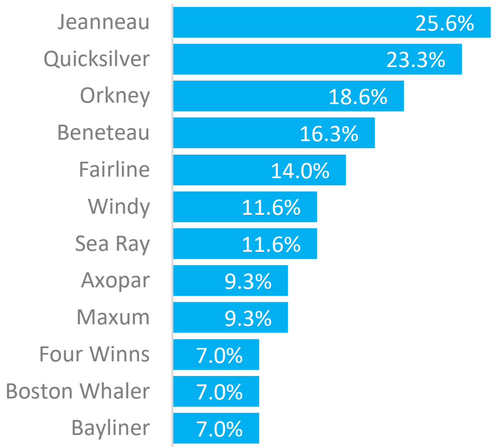


Source: British Marine, Boaters & Boat Owners Survey 2021

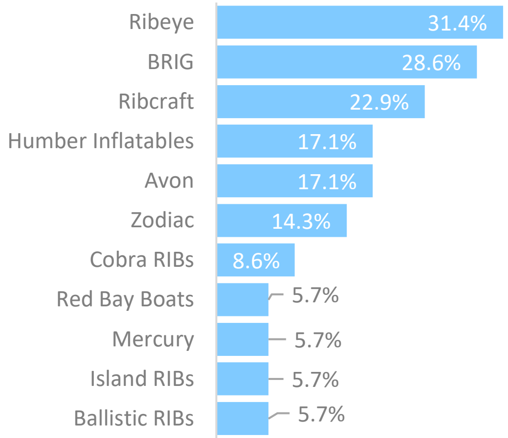
Boat Purchasing Trends: Most Popular Brands to Buy

UK-produced boats lead the small sailboat and rigid inflatable markets, with models from RS Sailing and Ribeye most popular among respondents. European brands – mainly French and German – are most sought after in the sailing yacht segment, especially blue water cruisers from Groupe Beneteau. Beneteau-built speedboats and small cruisers also dominate the small power segment, with imported US speedboats like Quicksilver also in high demand. The larger motorboat segment is dominated by UK current and legacy brands, like Princess, Fairline and Sealine. The narrowboat segment meanwhile is entirely fed by UK manufacturers, most of whom are small cottage builders. However, the most sought-after models are from the industry's larger producers like Liverpool Boats, Collingwood and Colecraft.

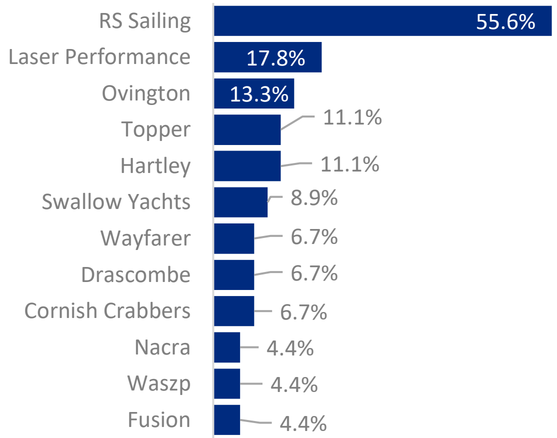
Small Motor Boats / Sportsboats



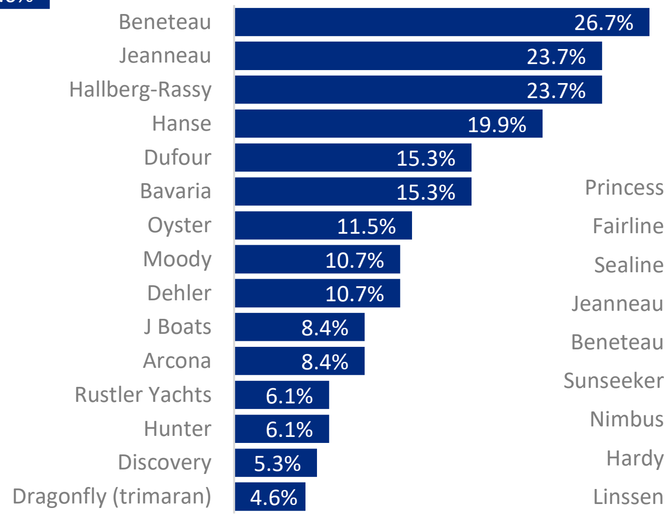
RIBs / Inflatables



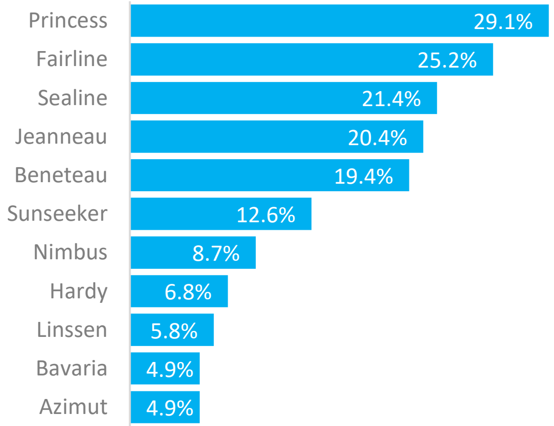
Sailing Dinghies / Small Sailboats



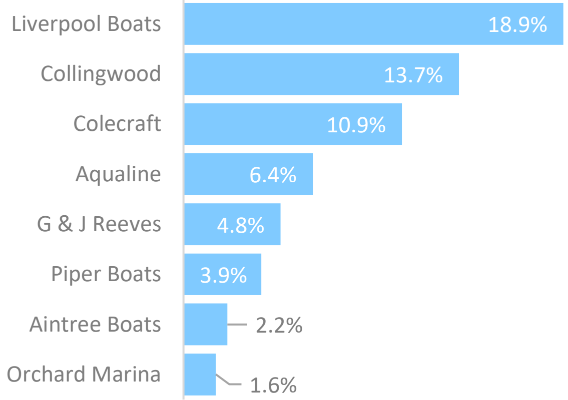
Sailing Yachts



Motor Yachts / Cruisers



Narrowboats



Note: *Boat brands excludes canoes, kayaks and stand-up paddleboards due to lack of sufficient data on these smaller watercraft.*

Source: British Marine, Boaters & Boat Owners Survey 2021

Further Information

Thank you for reading this report. This research was produced by British Marine's Market Research and Statistics department. British Marine publishes a wide range of market and economic research to promote and support the UK leisure, Superyacht and small commercial marine industry, including:

- *Biennial KPI research providing insight on the economic performance and impact of the industry;*
- *Bi-annual infographic reports tracking key business trends across all marine industry sectors;*
- *Annual market research tracking boating participation and ownership trends;*
- *Reports quantifying the volume, value and key characteristics of boating tourism;*
- *Trade data exploring marine related imports and exports and the UK marine industry's key trading partners;*
- *And a host of other research reports providing insight on domestic and international leisure marine markets*

These research reports are available for free to all members of British Marine and can be downloaded directly from the British Marine website (member log-in required). British Marine also provides a bespoke analytical service to support members' individual needs. To learn more about market research at British Marine, please contact info@britishmarine.co.uk.