



Safe Boating Campaign
National Safe Boating Council
outreach@safiboatingcouncil.org
www.safiboatingcampaign.com

Annual Awareness Survey

Commissioned by National Safe Boating Council
Conducted by WHP Research

BACKGROUND

The National Safe Boating Council (NSBC) is a catalyst for recreational boating safety and promoting a safe boating experience through educational programs, resources, tools, creative messages, and instructor training. NSBC's Safe Boating Campaign is an annual boating safety campaign that promotes responsible boating and the value of voluntary life jacket wear by recreational boaters. The Wear It tagline, now in its 15th year, continues to be incorporated into NSBC's Safe Boating Campaign.

RESEARCH OBJECTIVES

NSBC would like to gain insights that might help improve the Safe Boating Campaign and provide a better understanding of the attitudes and behaviors regarding life jacket wear. Specifically, the research objectives are to:

- Collect self-reported life jacket wear
- Determine reasons for wearing or not wearing a life jacket
- Understand boaters' attitudes toward safety
- Gain reactions to ideas that might convince boaters to increase wearing of life jackets
- Measure awareness of the Safe Boating Campaign image

In addition to gaining the above knowledge, through the data collection outreach effects and surveying, NSBC also will be promoting safe boating and building awareness of the Safe Boating Campaign and image.

METHODOLOGY

For 2021, a quantitative online survey was conducted, using the 2020 design with minor changes. WHP Research with input from NSBC designed and programmed the survey, which is the fourth year of using an online approach. In prior years, data was collected through on-site intercepts. This year's research results are shared **in a summary** based only on the **total sample**.

To qualify for the survey, an individual must have participated in a recreational boating activity during the 2019, 2020, or 2021 boating season (excluding commercial boats) and must be 18 years of age or older. NSBC communicated and promoted the survey through emails, social media, and partner outreach. To encourage participation, respondents providing contact information would have a chance to win an NSBC prize.



A total of 2,441 surveys were completed between March 16 and September 10, 2021, taking a participant an average of 6 minutes.

- 3,292 entered the survey
- 2,914 qualified to participate and started the survey
- 2,441 completed the survey (84% completion rate among those who qualified)

Participants are from Canada and all U.S. states.

OVERVIEW

The Safe Boating Campaign, promoted by the Wear It tagline, continues to **gain awareness**, with three-quarters (77%) of the 2021 participants recognizing the image.

Life jacket wear (“always or most of the time”) is similar to 2018, with 57% indicating they “always or most of the time” wear life jackets in 2021, a decline from 2019 and 2020.

Barriers to life jacket wear are no laws requiring wear, uncomfortable jackets, forgetting or not thinking about wearing one, and/or simply not wanting to wear one.

Motivators to increase life jacket wear among users are a law requiring boaters to wear life jackets, having life jackets that are more comfortable or less bulky, having life jackets that are easy to use/wear, and awareness of boating accidents where wearing a life jacket saved lives. These reasons have been the top ones for several years.

Ownership of life jackets is high, with 97% of all participants owning a life jacket and 37% of them owning an inflatable life jacket. In addition, 48% of all participants have worn an inflatable life jacket.

COVID-19 has impacted the frequency of boating, with 36% saying they will go more often and only 10% saying they will go less often this year.

For next year’s survey, the following suggestions are offered:

- Attempt to gain survey participation among those under 55 years old.
- Analyze results to allow more detailed comparisons and in-depth understanding, similar to analyses completed for the 2020 survey.
- Determine whether to keep the questions that were added in 2020 and/or replace them with new questions to provide new insights.
- Review survey to determine if any questions could be eliminated, to reduce its length.

DETAILED FINDINGS



Recognize Image

About three-fourths of participants recognize the campaign image this year (77% for 2021 versus 79% for 2020).

Recognize Image

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2427)	(1923)	(1873)	(2624)
	%	%	%	%
Yes	60	69	79	77
No	36	23	15	17
Not sure	5	8	6	6

Life Jacket Wear

More than one-half of participants (57%) wear life jackets "always or most of the time."

Life Jacket Wear

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2522)	(1986)	(1999)	(2779)
	%	%	%	%
<u>Top Two Boxes</u>	<u>56</u>	<u>66</u>	<u>69</u>	<u>57</u>
Always	41	49	52	39
Most of the time	15	17	17	18
Sometimes	17	17	16	19
<u>Bottom Two Boxes</u>	<u>27</u>	<u>17</u>	<u>16</u>	<u>23</u>
Rarely	18	12	11	16
Never	9	6	5	8

Reasons for Wearing Life Jackets

"**I feel safest when wearing a life jacket/it's a safe practice**" (46%) and "**Conditions or weather are bad or expected to worsen**" (43%) are most often selected as reasons for wearing a life jacket.

Reasons for Wearing Life Jackets

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering and excludes those who say "never wear":</i>	(2260)	(1851)	(1872)	(2510)
	%	%	%	%
I feel safest when wearing a life jacket / it's a safe practice	57	53	53	46
It's automatic - I wouldn't boat without it on	NA	42	45	36
Conditions or weather are bad or expected to worsen	48	37	36	43



I have heard of situations where a life jacket has saved a life	29	36	34	30
I am a real boater	NA	NA	27	25
I am required to wear a life jacket by law	23	25	21	17
A child is on board	NA	24	15	17
I know someone who was in a boating accident	9	12	11	10
I am not a good swimmer or do not know how to swim	9	9	8	8
I signed a pledge to wear a life jacket	7	9	8	6
Other reasons	14	7	9	8

People Who Wear Life Jackets

About nine out of ten (88%) indicate that people who wear life jackets are most likely to be **“responsible boaters.”**

People Who Wear Life Jackets Are Most Likely To Be:

	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(1991)	(2013)	(2786)
	%	%	%
Responsible boaters	91	91	88
Bad swimmers	4	3	4
Boat operators	1	2	1
New boaters	1	1	2
Other reasons	4	4	4

Reasons for Not Wearing Life Jackets

“I am not required to wear one by law” is most often selected as the reason for not wearing a life jacket (34%).

Reasons for Not Wearing Life Jackets

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering (excludes "always wear"):</i>	(1424)	(977)	(917)	(1611)
	%	%	%	%
I am not required to wear one by law	41	38	29	34
A life jacket is uncomfortable	32	27	22	22
Not applicable: I always wear a life jacket.	NA	14	18	17
I forget to wear it or just don't think about wearing one	20	18	16	15



I don't want to wear a life jacket	NA	NA	16	18
I don't need to wear a life jacket because I'm a strong swimmer	7	11	7	6
I'm not asked to wear a life jacket by the boat owner or someone else	7	7	6	5
A life jacket is not stylish or "cool"	2	3	1	1
I don't want to spend money on a life jacket or can't afford one	1	2	1	1
Other reasons	19	20	21	18

Boating Safety Attitudes

Almost all participants (98%) agree with the statement, **"I try to boat safely and responsibly at all times."** Results have remained consistent from year to year.

The statements with the least amount of agreement are, **"I have been involved in a situation where a life jacket was useful or needed"** (48%) and **"I am a very strong swimmer"** (63%).

Boating Safety Attitudes (% Strongly Agree/Agree Somewhat)

	<u>2018</u> <i>(2315)</i>	<u>2019</u> <i>(1881)</i>	<u>2020</u> <i>(1820)</i>	<u>2021</u> <i>(2548)</i>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
<i>Total sample size:</i>				
I try to boat safely and responsibly at all times	99	98	98	98
I believe drowning fatalities related to boating accidents would be dramatically reduced if more people wore life jackets	92	92	93	89
I worry about other boaters and their unsafe practices	91	90	89	88
It is important for me as a boater to encourage others to wear life jackets at all times when boating or fishing	74	76	77	66
I am a very strong swimmer	64	67	59	63
I have been involved in a situation where a life jacket was useful or needed.	50	49	52	48



Ways to Motivate Boaters to Wear Life Jackets

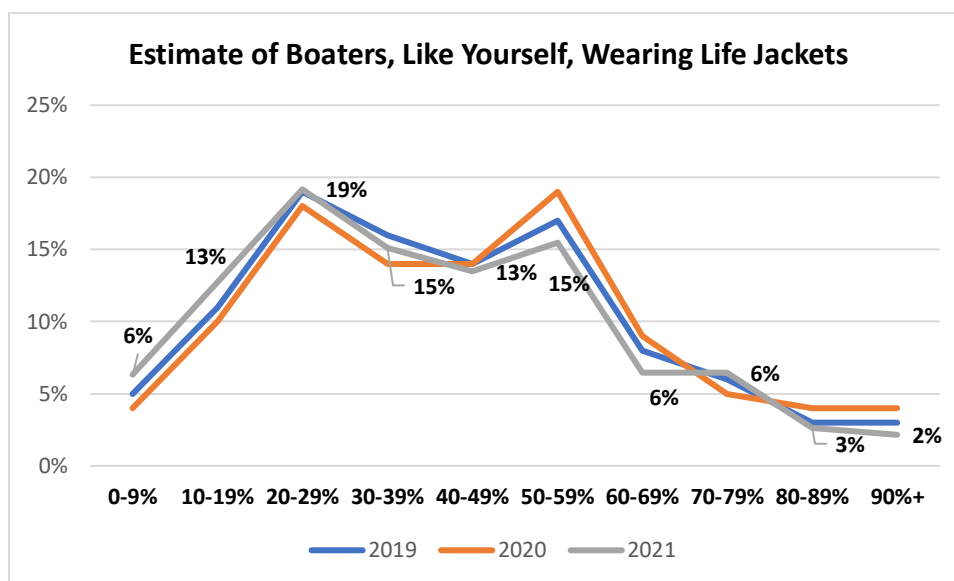
Having “**a law requiring boaters to wear life jackets**” (40%) or “**a life jacket that was more comfortable or less bulky**” (43%) would motivate some boaters to wear life jackets. These two reasons continue to remain as the top motivators to wear life jackets.

Motivators to Wear Life Jackets

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering (excludes "always wear"):</i>	<i>(1283)</i>	<i>(906)</i>	<i>(968)</i>	<i>(1446)</i>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
A law requiring boaters to wear life jackets	49	47	42	40
If I had a life jacket that was more comfortable or less bulky	50	51	40	43
If I had a life jacket that was easy to use/wear	37	33	29	32
I was in a boating accident where the wear of a life jacket saved my life or the life of someone else	19	21	16	15
If the boat operator was wearing a life jacket	NA	NA	16	11
Hearing or seeing reminders to wear a life jacket	14	15	15	9
Being educated on boat safety and the use of life jackets	12	12	12	11
If life jackets were provided for free	11	16	8	7
Signing a pledge card agreeing to wear a life jacket	11	7	6	4
If I had a life jacket that was more stylish	6	10	5	6
Seeing well-known celebrities or athletes wearing life jackets when boating	3	5	4	2
Not applicable, I always wear a life jacket	11	9	12	11
Other responses	9	8	11	11

Estimate of Boaters Wearing Life Jackets

Boaters estimate that, on the median, about 35-39% of boaters, like themselves, wear life jackets when boating.



(Percentages shown are 2021.)

Participant Profile: Boating

Frequency of Boating

About one-third of participants are boating or expecting to boat more often this year (36%), with only 16% saying less often.

Frequency of Boating

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2266)	(1809)	(1746)	(2455)
	%	%	%	%
More often	28	31	26	36
About the same	50	45	42	48
Less often	21	24	32	16



Impact of COVID-19 on Frequency of Boating

When asked about their expected frequency of boating due to COVID-19 (an earlier question in the survey than the frequency of boating question shown above), one-half of participants (52%) said COVID-19 has “**no impact.**”

Impact of COVID-19 on Frequency of Boating

	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2080)	(2848)
	%	%
<u>Top Two Boxes</u>	28	36
Will likely go much more often	15	22
Will likely go slightly more often	13	14
No impact	40	52
<u>Bottom Two Boxes</u>	28	10
Will likely go slightly less often	16	6
Will likely go much less often	12	3
No idea	4	2

Type of Boat Used

The boaters who completed surveys have most recently used an open powerboat (41%) or a human propelled vessel (24%).

Boat Most Recently Used

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2537)	(1997)	(2036)	(2795)
	%	%	%	%
Open Motor Boat or Cabin Motor Boat	45	49	45	55
Open Powerboat	NA	39	34	41
Cabin Powerboat	NA	10	11	14
Human Propelled Vessel (canoe, row boat, kayak, paddle board)	22	25	37	24
Pontoon	NA	14	9	12
Fishing boat (not commercial)	24	NA	NA	NA
Sailboat	6	6	5	6
Personal Watercraft (jet ski, wave runner)	4	6	3	3

Type of Boat Owned

More than one-half of participants own an open powerboat (52%). In addition, almost one-half of participants (45%) own a human propelled vessel.



Type of Boat(s) Owned

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(1746)	(1327)	(1474)	(2161)
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Open Motor Boat or Cabin Motor Boat	49	62	56	67
Open Powerboat	NA	50	44	52
Cabin Powerboat	NA	12	12	15
Human Propelled Vessel (canoe, row boat, kayak, paddle board)	43	48	59	45
Pontoon	NA	11	9	14
Fishing boat (not commercial)	31	NA	NA	NA
Sailboat	9	11	9	10
Personal Watercraft (jet ski, wave runner)	8	12	8	8

Rent Boat

Among those who do not own boats, about three out of ten (32%) rented a boat the last time they went boating.

Rented a Boat Last Time Boating

	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering (non-owners):</i>	(481)	(270)	(293)
	<u>%</u>	<u>%</u>	<u>%</u>
Yes	27	30	32
No	73	70	68

Life Jacket Ownership

Almost all participants (97%) own a life jacket, the same as in 2020. The number of participants who own both inherently buoyant and inflatable life jackets is 32% in 2021, similar to 2020.

Life Jacket Ownership

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2252)	(1805)	(1736)	(2449)
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Inherently buoyant life jackets	55	63	59	60
Inflatable life jackets	4	3	5	5
Both types	33	27	33	32
Do not own a life jacket	8	8	3	3



Inflatables

From a question added in 2020, almost one-half (48%) of the participants have worn an inflatable life jacket.

Have Worn Inflatables

	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(1736)	(2449)
	<u>%</u>	<u>%</u>
Yes	49	48
No	50	51
Unsure	1	1

Boat Operators

About eight out of ten participants (81%) are "boat operators." For clarity, a boat operator was defined as being "behind the wheel of the boat similar to a driver in a car."

Boat Operator

	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(1942)	(1916)	(2681)
	<u>%</u>	<u>%</u>	<u>%</u>
Yes	67	69	81
No	33	31	19

Less than one-half (46%) of the boat operators require passengers to wear life jackets.

Require Passengers To Wear Life Jackets at All Times

	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number boat operators answering:</i>	(1307)	(1316)	(2153)
	<u>%</u>	<u>%</u>	<u>%</u>
Yes	58	57	46
No	42	43	54



Those who do not require their passengers to wear life jackets are most likely to say, **“I am not required to by law.”**

Reasons for not Requiring Passengers To Wear Life Jackets

	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number boat operators answering:</i>	(534)	(541)	(1129)
	%	%	%
I am not required to by law	57	49	56
A life jacket is uncomfortable	16	14	14
Passengers are strong swimmers	9	6	5
A life jacket is not stylish or "cool"	3	1	1
I don't want to spend money on life jackets for passengers	1	0	0
Others	39	49	42

Work in Boating Industry / Boating Educators

Only 15% of the 2021 survey participants work in the boating industry or are boating educators.

Work in Boating Industry or Boating Educator

	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(1724)	(2441)
	%	%
Yes	25	15
No	75	85

Participant Profile: Demographics

Gender

This year’s participants skew heavily male (72%), higher than all prior years.

	Gender			
	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2250)	(1805)	(1729)	(2445)
	%	%	%	%
Male	65	44	67	72
Female	34	56	32	27
Prefer not to answer	1	1	1	1



Age

Similar to last year, about six out of ten participants in 2021 were 55 years or older.

	Age			
	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2250)	(1805)	(1729)	(2445)
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
18 to 24 years	1	4	2	1
25 to 34	6	19	5	4
35 to 44	13	26	12	11
45 to 54	23	27	19	23
55 to 64	34	15	31	36
65 years or older	23	9	31	25

Children

Only 23% of the participants have children under 18 years of age, the same as last year.

	Children Under 18 Years of Age			
	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2250)	(1805)	(1729)	(2445)
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Yes	24	49	23	23
No	76	51	77	77

States

Boaters from all states completed a survey. The states with 100 participants or more are Florida, New York, Ohio, Texas, and Virginia.



Learned About Survey

Most participants (83%) learned about the survey from social media.

How Learned About Survey

	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
<i>Number answering:</i>	(2245)	(1804)	(1724)	(2441)
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Social media	72	86	73	83
Email	17	8	15	7
Website	5	2	5	5
Membership in the National Safe Boating Council	3	1	4	1
Event	0	0	0	1
Others	3	3	4	3