



# **2017 CSBC SAFE BOATING TRACKING SURVEY**

## **Consumer Research Results**

### **Final Report**

***Prepared for: Canadian Safe Boating Council***

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***Date: October 30, 2017***



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# Introduction



# Research Objectives

1. **Measure & track awareness of safe boating messages** communicated by the CSBC's annual boating safety campaign
  - Identify how well specific campaign messages are being communicated, in the areas of "Wearing PFDs", "drinking & boating", "preparedness", "cold water" and "boating education".
  - Identify who the campaign is reaching and opportunities to improve its reach & impact.
  - Aided awareness of selected campaign elements – newspaper/magazine articles, "Catching Impaired Boating" poster, "Tired of Waiting - Lifejacket poster".
2. **Measure & track boating safety attitudes and behaviours** among Canadian boaters, and how they have been affected by awareness of the SBAW campaign messages.



# Research Methodology

- National online survey as part of Ipsos Reid's eNation omnibus survey.
- Fieldwork conducted August 24-29, 2017.
- $n = 1,000$  Canadian adults, nationally representative of the Canadian population.
- Most Safe Boating Tracking survey questions asked of  $n = 469$  subgroup of the Canadian population who participate in recreational boating activities at least occasionally
  - Including pleasure powerboating/cruising/waterskiing/wakeboarding, fishing from a boat, riding a personal watercraft, canoeing, kayaking, stand-up paddleboarding, sailing, windsurfing/kiteboarding &/or boating in other unpowered craft.
- On a sample size of 1,000, results are accurate 19 times out of 20 to within  $\pm 3\%$ .
- On a sample size of 469, results are accurate 19 times out of 20 to within  $\pm 5\%$ .
- Circles and squares are used throughout this report to indicate differences that are significant at the 95% confidence level. Differences that are "approaching significance" (80% confidence level) are indicated with dotted circles and squares.
- Solid arrows are used to indicate changes in 2016 vs prior wave results that are significant at the 95% level. Dotted arrows indicated changes that are "approaching significance."
  - Black arrows indicate significant changes vs the previous wave.
  - **Green** arrows indicate significant changes for August 2017 vs. August 2015.



# Summary – Key Findings & Implications



# Summary of Key Findings

## Boating Participation:

- In 2017, 45% of Canadian adults participate in recreational boating activities
  - Fishing, pleasure powerboating, canoeing and kayaking continue to be the most popular boating activities.
- Boating participation 2017 continues in-line with previous years – overall, and for both powerboating and non-power activities.
- Half (50%) of Canadians who not currently participating in boating are “Interested Non-boaters” who would like to get involved.
- Among current Boaters, one-third (32%) are “New Boaters” who began boating this year or 1-2 years ago.



# Summary of Key Findings

## Awareness of Safe Boating Messages:

- Overall boater awareness of CSBC boating safety campaign messages up to all-time high in August 2017.
  - 81% of boaters aware of CSBC safe boating messages in August 2017.
  - And one-third (33%) of boaters “highly aware” of 5 or more CSBC messages, also an all-time high.
  - With both Powerboaters and Non-powerboaters, “total aware” and “highly aware” of CSBC campaign reached all-time highs in August 2017
- Strong campaign awareness in August 2017 across all boating activity groups.
  - All-time high campaign awareness with all boater groups, except sailors.
- All-time highs for August 2017 are broad-based across age, gender and regions.
- August 2017 total awareness also strong with ‘New Boaters’ (85%), and with boaters ‘Not Born in Canada’ (85%).
- Higher 2017 message awareness for “don’t drink & operate boat”, “wear your lifejacket”, “impaired boating is impaired driving”, “have the right equipment”, “check the weather” and “get your boating license”.
  - All-time highs for each of these messages.
  - Stronger 2017 message awareness with Fishers, Pleasure Powerboaters, Boat Drivers & Passengers and Paddlers, for many key messages.





# Summary of Key Findings

## Sources of Awareness of Safe Boating Messages:

- More overall sources of awareness contributing in 2017, with all-time highs for Advertising, and Online Websites & Social Media; also strong News Coverage.
  - Advertising awareness up in August 2017, tracing to more awareness of Radio ads.
  - More news coverage in August 2017 than May 2016; in-line with August 2015.
  - More online awareness in August 2017, reflecting more Social Media recall.
- Fewer sources of awareness for boaters 35-54 years overall and for many specific sources; less news coverage offline reaching all three age groups.
- Overall advertising awareness was on par with May 2015, although lower for internet/website and out-of-home ads.
- Less online awareness since May 2015, due to a decrease in online articles / social media. However, online awareness remains higher in 2016 than 2014 and 2013.



## Summary of Key Findings

### Aided Awareness of CSBC Safe Boating Materials:

- Almost one-quarter (22%) of boaters recall seeing the “Help us Catch Impaired Boaters” (English) and “One Drink can Change Everything” (French) ads / posters – up from 16% in August 2015.
  - Awareness improved in 2017 in French Canada, up to English Canada level..
- The potential to be reported via “9-1-1” motivates the majority of boaters (57%) to be much more likely to avoid drinking while operating a boat.
  - Across all boating activities.
  - Especially younger boaters 18-34 yrs of age, New Boaters and boaters Not Born in Canada.
- About one-quarter (24%) of boaters say they saw the 2017 CSBC “Tired of Waiting” Lifejacket transit shelters/mall posters/ads.
- Over one-third (38%) of boaters recall seeing daily/community newspaper and magazine articles on an aided “example” basis.
  - Aided awareness was higher with New Boaters and PWC Riders.



# Summary of Key Findings

## Safe Boating Attitudes / Behaviours :

- Strong (top-2-box) majority boater intent/support for desired safe boating attitudes & behaviours re: drinking & boating, wearing lifejackets, preparedness and cold water, and boating education beyond PCOC.
- Increased intent to wear lifejackets and get more info/take boating courses vs. August 2015. Also increased intent to not drink & boat, advocate for lifejacket wearing, check boat and get PCOC vs. May 2016.
- Stronger drinking & boating attitudes/behaviours among boaters 18-34 yrs, 35-54 yrs and males. Stronger intent to wear lifejackets across age groups and both gender.
- By Boating Activities:
  - In 2017 the overall improvement in drinking & boating intentions/ behaviours, traces to both powerboaters and non-powerboaters/paddlers.
  - The 2017 overall improvement in boater intentions to wear lifejackets traces especially to fishers and pleasure powerboaters.
- By Region:
  - In 2017 the overall boater improvement in drinking & boating intentions/ behaviours, traces to Quebec and the West.
  - The 2017 overall improvement in boater intentions to wear lifejackets traces especially to Quebec and the Prairies.



# Summary of Key Findings

## **Wearing Lifejackets:**

- All-time high in August 2017 for proportion of boaters (63%) who say they 'Always' wear their lifejacket.
  - Regionally, increase in lifejacket wearing in Quebec and Prairies; and with boaters 55+ yrs.
  - Increased lifejacket wearing for Pleasure Powerboaters, Drivers of powerboats and Fishers.
  - By activity, more Fishers who say they 'Always' wear a lifejacket in 2017 compared to 2015; no change for those pleasure boating in powerboats <6 metres, or paddling

## **Drinking & Boating:**

- More boaters in August 2017 say they never drink before or while boating compared to May 2016; similar proportion as in August 2015.
  - More boaters in Quebec & Prairies saying they never drink before or while boating in August 2017.
  - By activity, no change in the proportion of Fishers, Pleasure Powerboaters and Paddlers who say they never drink while fishing/ boating/ paddling in August 2017 vs. August 2015



# Implications (for discussion)

## 1. The CSBC's boating safety campaign was very effective in getting its safety message out to Canadian boaters in 2017... even more so than in previous years.

- Record high awareness levels achieved in 2017 – for overall campaign awareness and for almost all of the CSBC's specific safe boating messages.
- More sources contributing to awareness in 2017, including significant increases for Advertising/ PSAs and Online (especially social media).
- Message awareness strength was broad-based – across boating activity groups including both Powerboaters and Non-powerboaters, across older and younger boaters, both genders, and with both New Boaters and established boaters.
- Record high majority levels of boaters aware of top priority 'Don't drink and operate boats' and 'Wear lifejackets' messaging.

## 2. Impact on boaters' attitudes and behaviours was also very strong in 2017.

- All-time highs in August 2017 for almost all desired safe boating behaviours / attitudes – at or beyond the levels achieved in August 2015 at the end of the previous CSBC 3-year campaign.
  - In particular, all-time high for claimed level of 'Always' wearing lifejackets while boating (63%), and even higher among New Boaters (72%).
  - Almost two-thirds (63%) of boaters saying the Never drink alcoholic beverages before or while boating – up from May 2016 (56%) and in-line with the stronger level seen in August 2015 (61%).

## 3. More success (awareness, attitude/ behaviour change) in Quebec & Prairies than in previous years.

- Due to regional summer safe boating field reps? More partner activity/execution? Other?

## ... broadly speaking, keep doing what worked in 2017!

- Maintain a strong level of communications "pressure" year-after-year... takes continuous, consistent effort over time, to change attitudes and behaviours.



## Implications (for discussion)

### 3. Opportunities to further improve CSBC safe boating campaign success in 2018:

- Further effort to gain TV and Radio PSAs airtime.
  - Despite changing consumer media habits, they remain major awareness builders.
  - Likely that MADD partner's success with TV PSAs contributed to step-change improvement in awareness of "impaired boating is impaired driving" message in 2016 / 17.
  - What stimulated the increased radio PSAs uptake? ... can we do more of 'that'?
- Great success Online in 2017 with social media; how to attract more boaters to our great safe boating websites?
  - SmartBoater.ca, StartBoating.ca. – more 'go there' action built into news coverage, social media, PSAs, online ads?
- Word of Mouth & Spokespeople are a solid source of awareness, only exceeded by Advertising / PSAs, but still only reaching one-third of boaters.
  - Can this be further ramped up? Online as well as "in person"?
- Less awareness / improvement in 2017 for "Call 911 to report and help catch impaired boaters" than other CSBC messages... **BUT**... the majority of boaters say they would be much more likely to avoid drinking while operating a boat knowing they could be reported to police via 9-1-1
  - Increase effort against this message in 2018.
- Further leverage / pool out the new creative approaches that seem to be working:
  - 'Help us Catch Impaired Boaters' – strengthen 'call 9-1-1' call to action.
  - 'Tired of Waiting' – strong debut in 2017... pool out to new boater situations / scenarios & media placements ... e.g. as long as you need to hook that fish, as long as it takes to get to that island, etc.
  - Extended media placements/adaptations targeted to boaters... e.g. online digital ads (banner ads, search ads, Facebook ads), etc... for 'Tired of Waiting', 'Help us Catch Impaired Boaters' & StartBoating.ca outreach poster.



# Detailed Findings



# Boating Participation

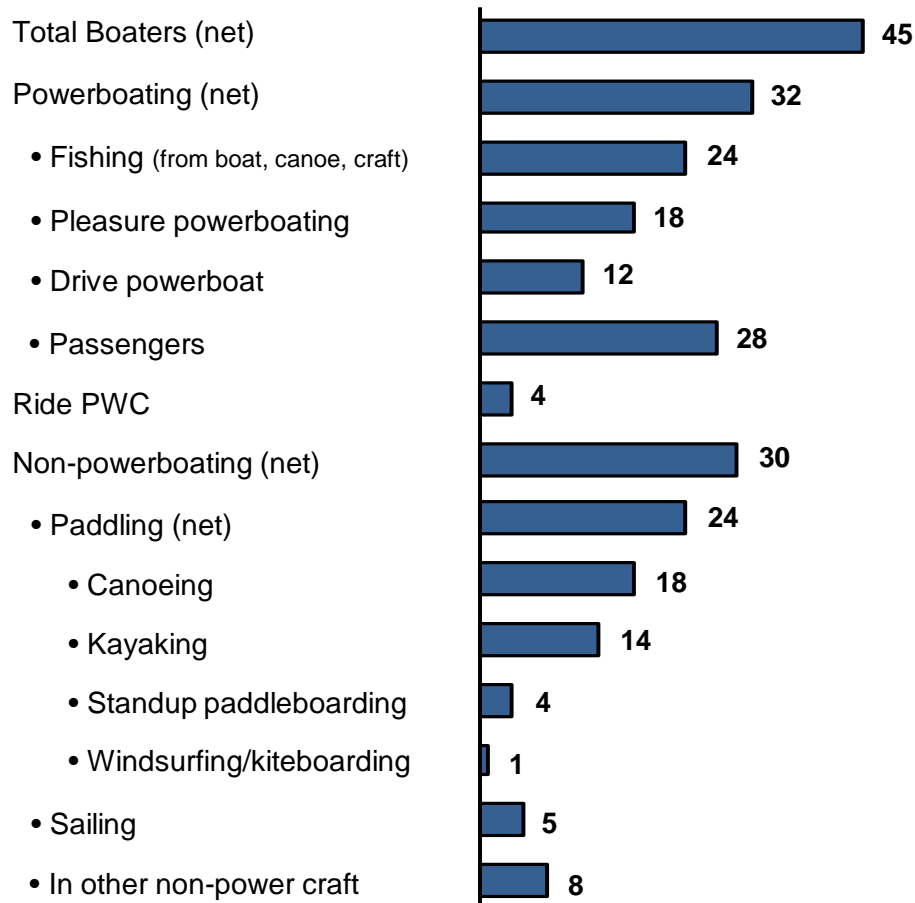




# In 2017, 45% of Canadian adults participate in recreational boating activities

- Fishing, pleasure powerboating, canoeing and kayaking are the most popular boating activities.

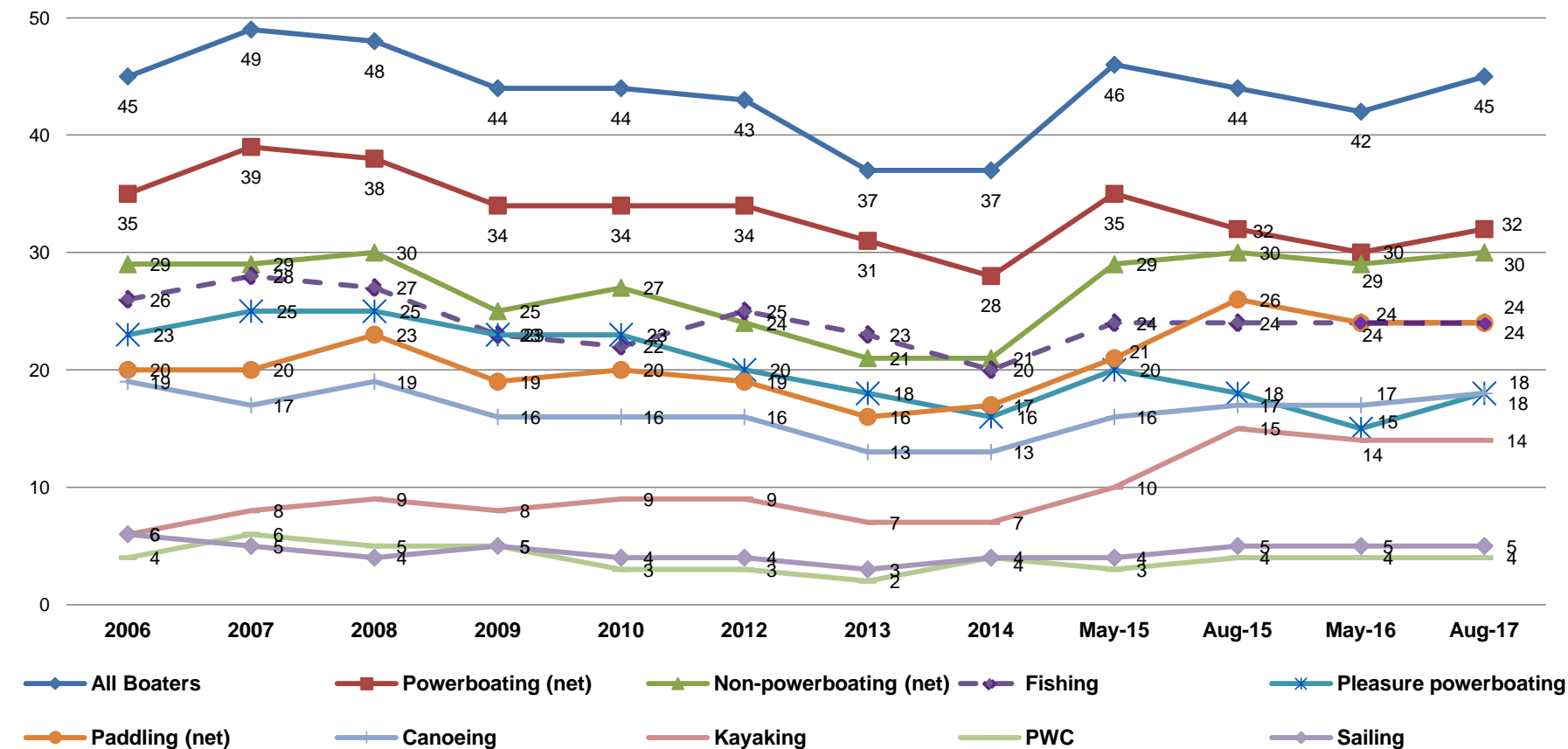
## 2017 - % of Canadian adults participating in boating activities at least occasionally - % of Total (n=1,000)





# Boating participation in 2017 continues in-line with previous years – overall, and for both powerboating and non-power

Canadian adults participating in boating activities - % of Total



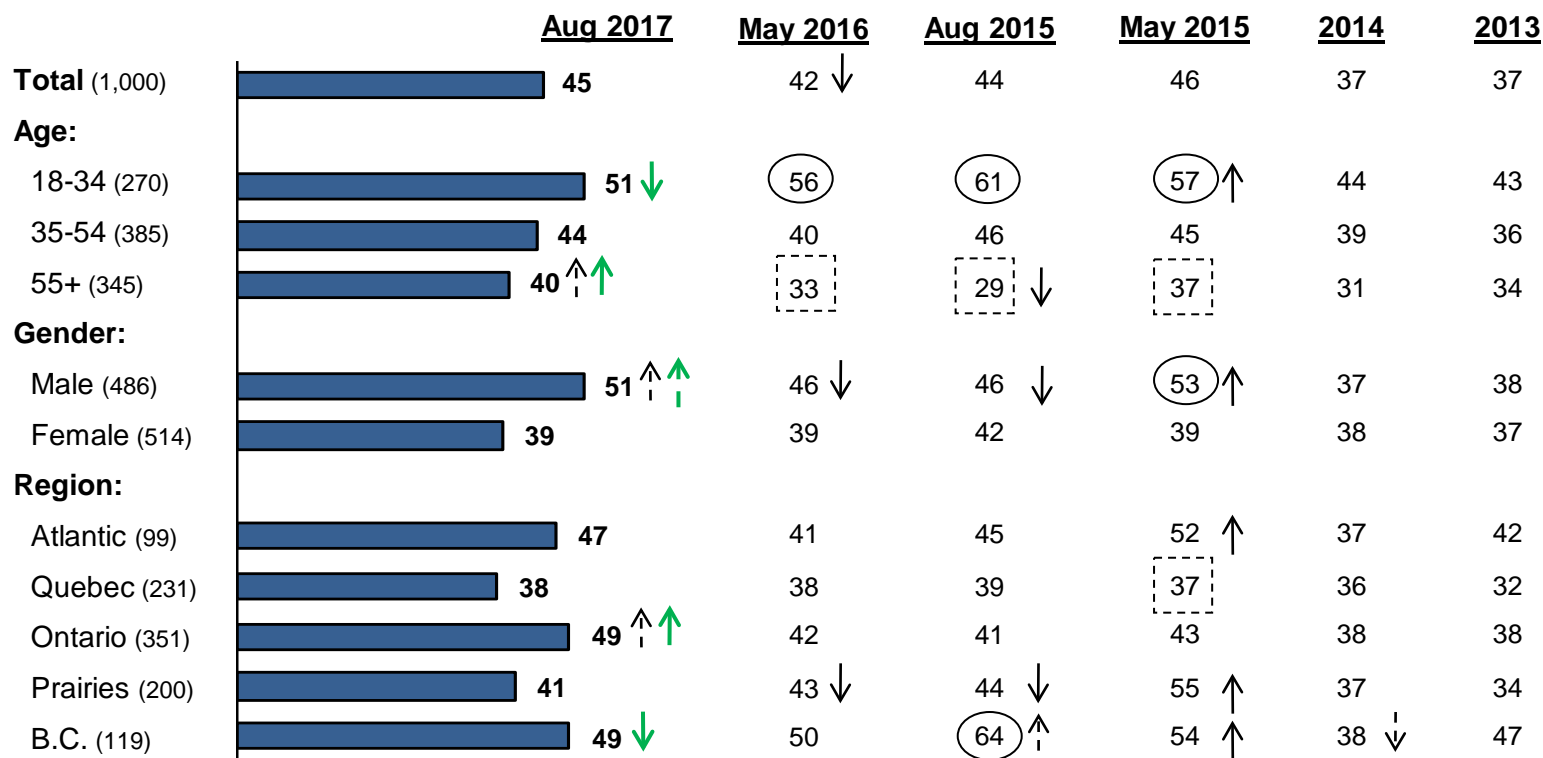
↑↓ = increase or decrease versus May 2015



# Boating participation was higher in 2017, among men (51%) older Canadians 55+ yrs (40%) and in Ontario (49%)

- Lower boating participation vs August 2015 for younger boaters 18-34 yrs and in B.C..

## Canadian adults participating in boating activities - % of Total



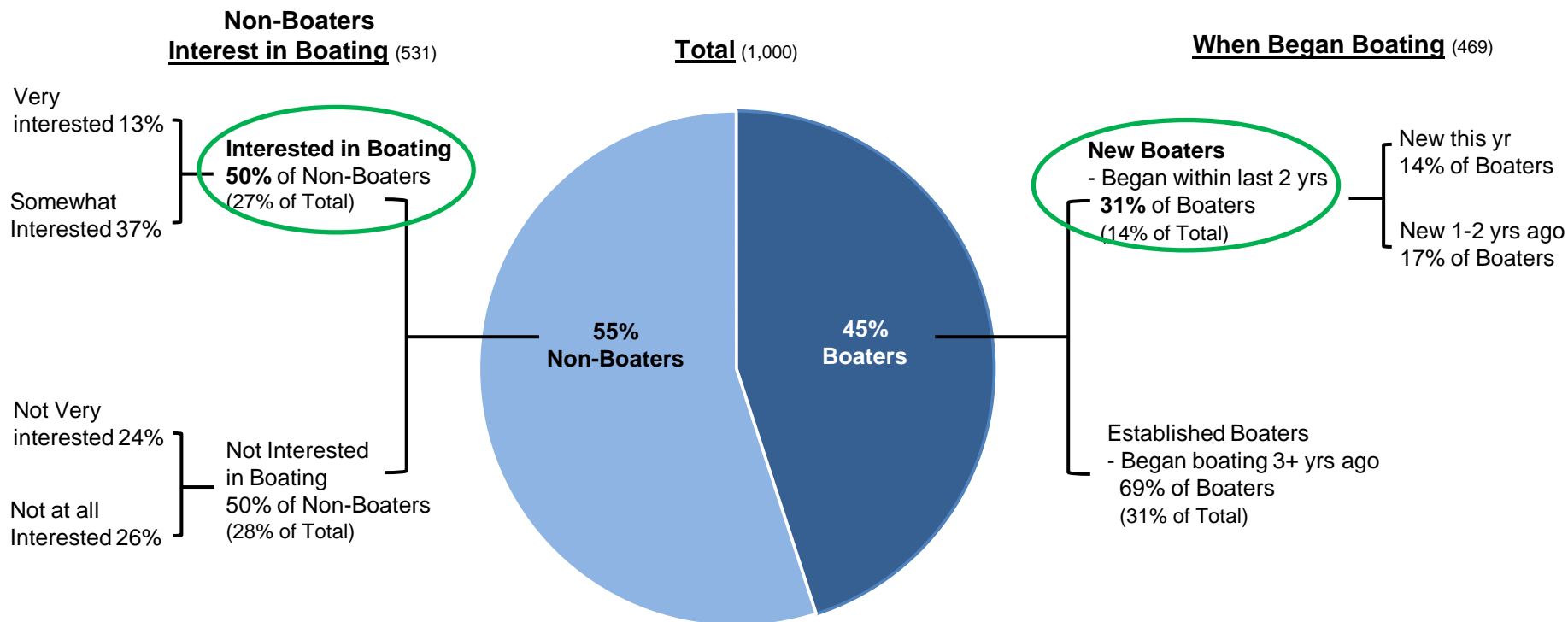
For 2016, ↑ ↓ = increase or decrease versus May 2015

↑ ↓ = increase or decrease versus August 2015



**Half (50%) of Canadians who are not currently participating in boating are “Interested Non-boaters” who would like to get involved.**  
**Among current Boaters, one-third (32%) are “New Boaters” who began boating this year or 1-2 years ago.**

- Interested Non-Boaters have a very similar age profile as current Boaters; but are more female (55%), more Not Born in Canada (18%), more likely to live in Quebec (25%) / less likely to live in Ontario (34%), and have lower household income (average (\$53,600) than Boaters (see Demographic Profile details in Appendix).
- New Boaters are younger (44% 18 to 34 yrs), somewhat more likely to be Not Born in Canada (17%) and have lower household income (average (\$57,400) than Boaters (see Demographic Profile details in Appendix).
- The boating activities that New Boaters are most often involved in are Kayaking (40% of new Boaters), Canoeing (40%) and Fishing (41%).





# Awareness of Safe Boating Messages

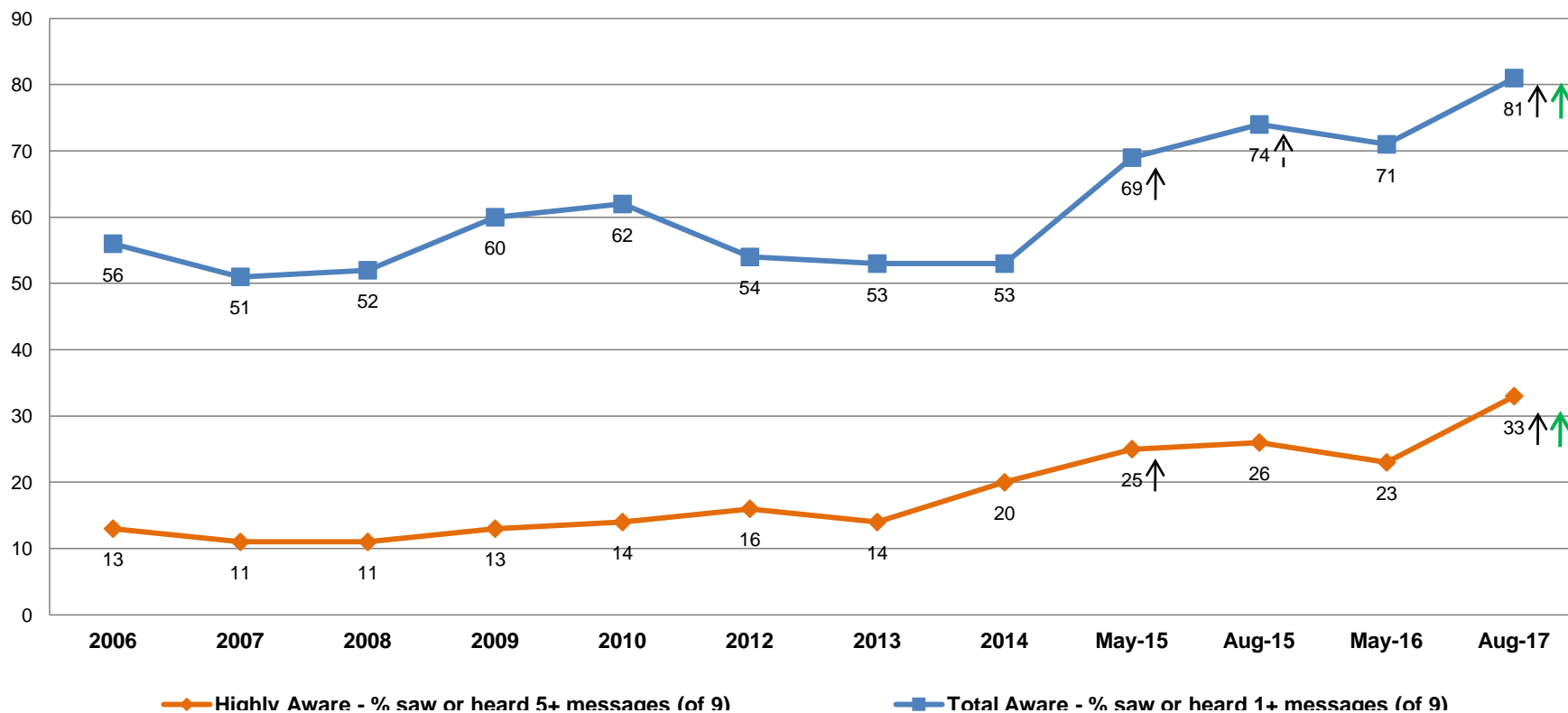


## Overall boater awareness of CSBC boating safety campaign messages up to all-time high in August 2017.

- 81% of boaters aware of CSBC safe boating messages in August 2017.
- And one-third (33%) of boaters “highly aware” of 5 or more CSBC messages, also an all-time high.

### % of boating activity participants who are Aware of boating safety messages

Total Boating (net) (n=469)

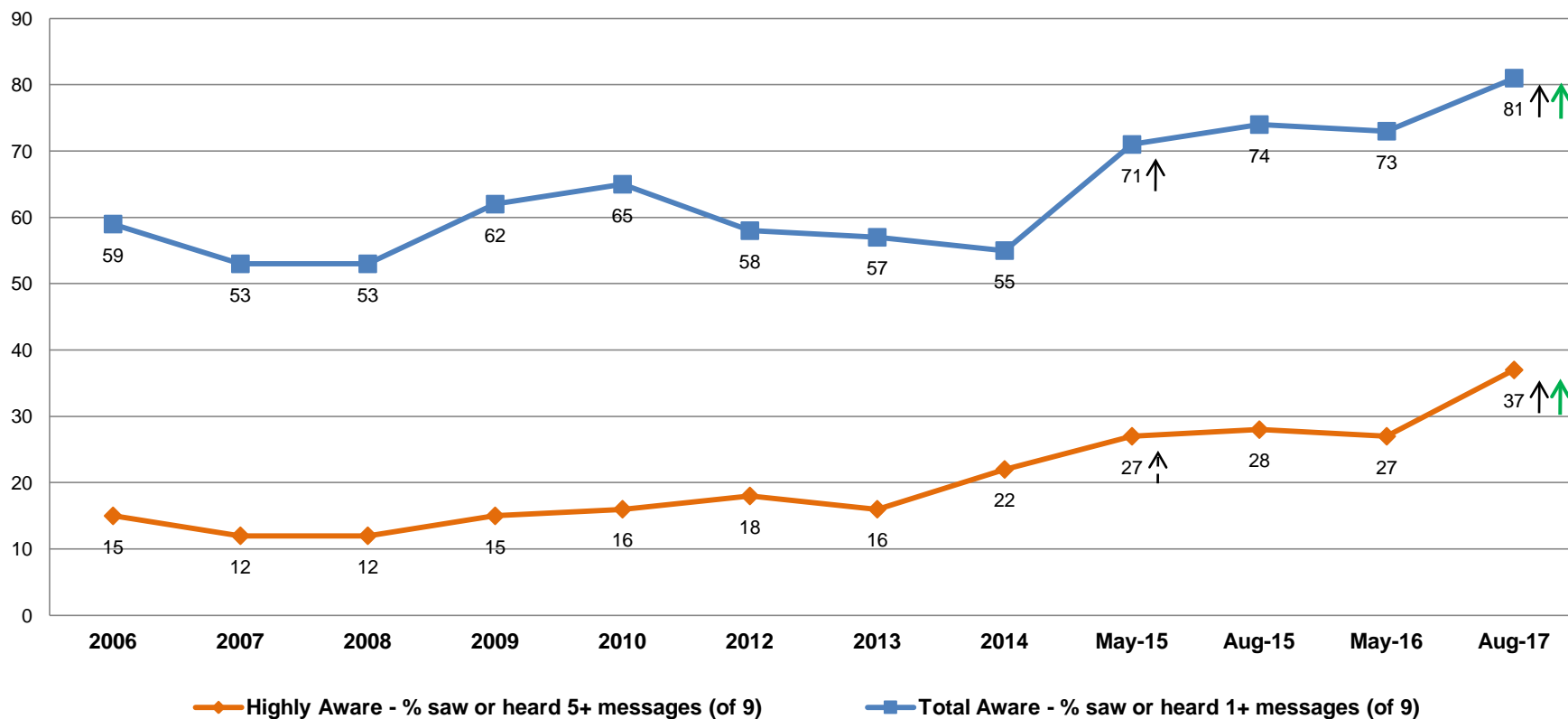




## With Powerboaters, “total aware” and “highly aware” of CSBC campaign reached all-time highs in August 2017.

% of boating activity participants who are Aware of boating safety messages

Powerboating (net) (n=304)

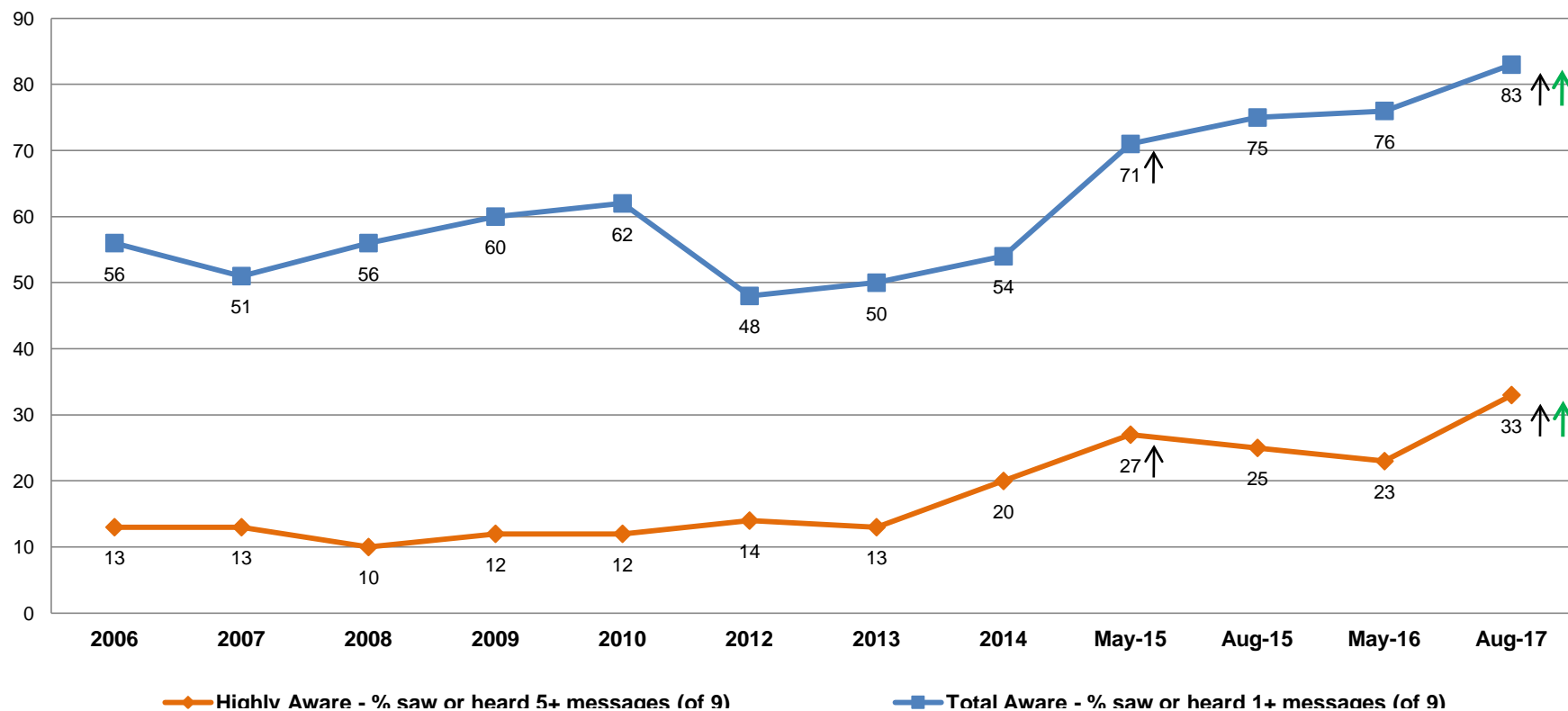




With Non-powerboaters, including paddlers and sailors, “total aware” and “highly aware” of CSBC also reached an all-time high in August 2017.

## % of boating activity participants who are Aware of boating safety messages

### Non-powerboating (net) (n=289)



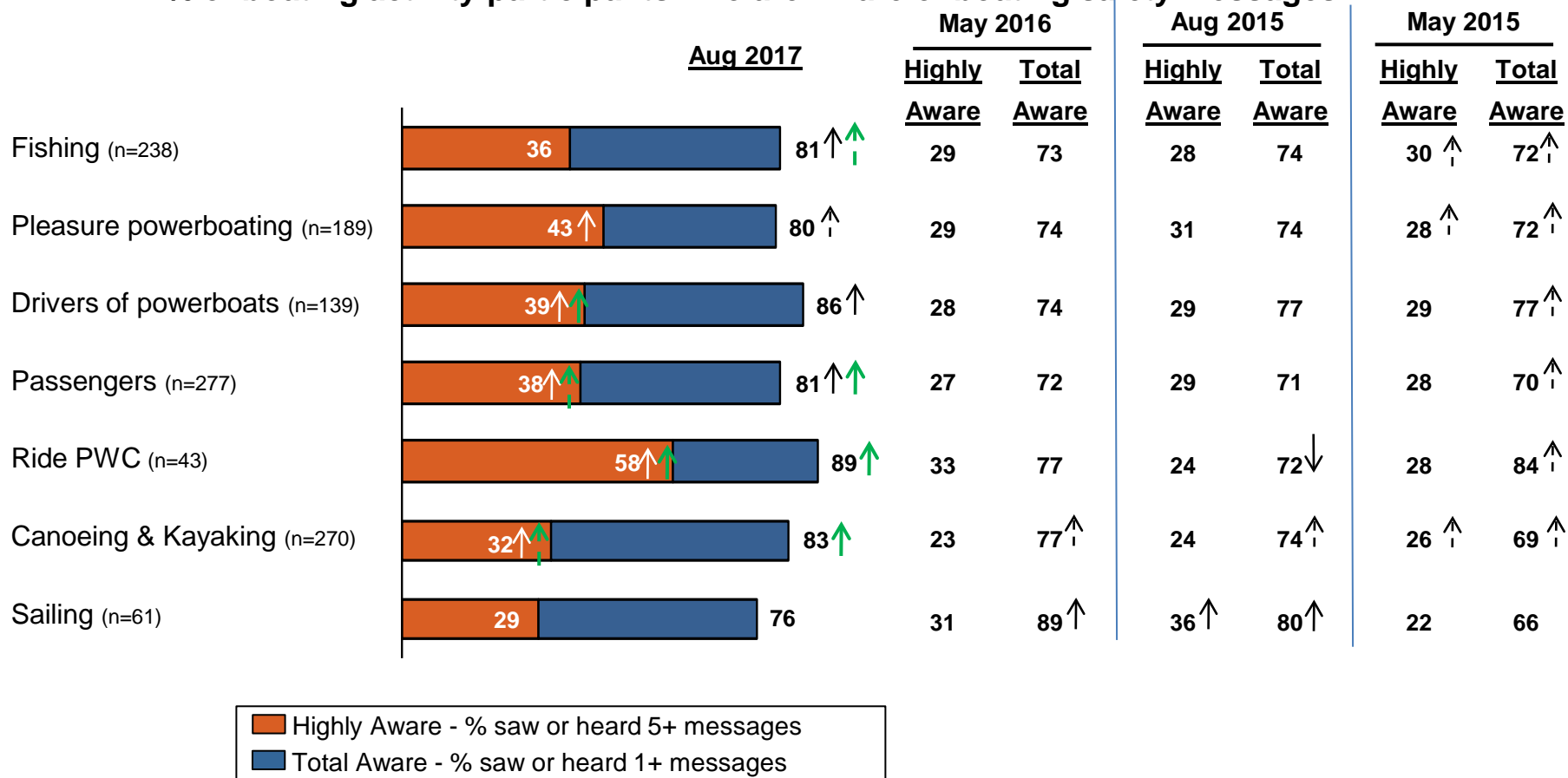




# Strong campaign awareness in August 2017 across all boating activity groups.

- All-time high campaign awareness with all boater groups below, except sailors.
- August 2017 total awareness also strong with 'New Boaters' (85%); New Boaters awareness of multiple messages (24% "highly aware") is not quite as broad as with more established boaters. With boaters 'Not Born in Canada', both total awareness (85%) and highly aware (33%) are strong.

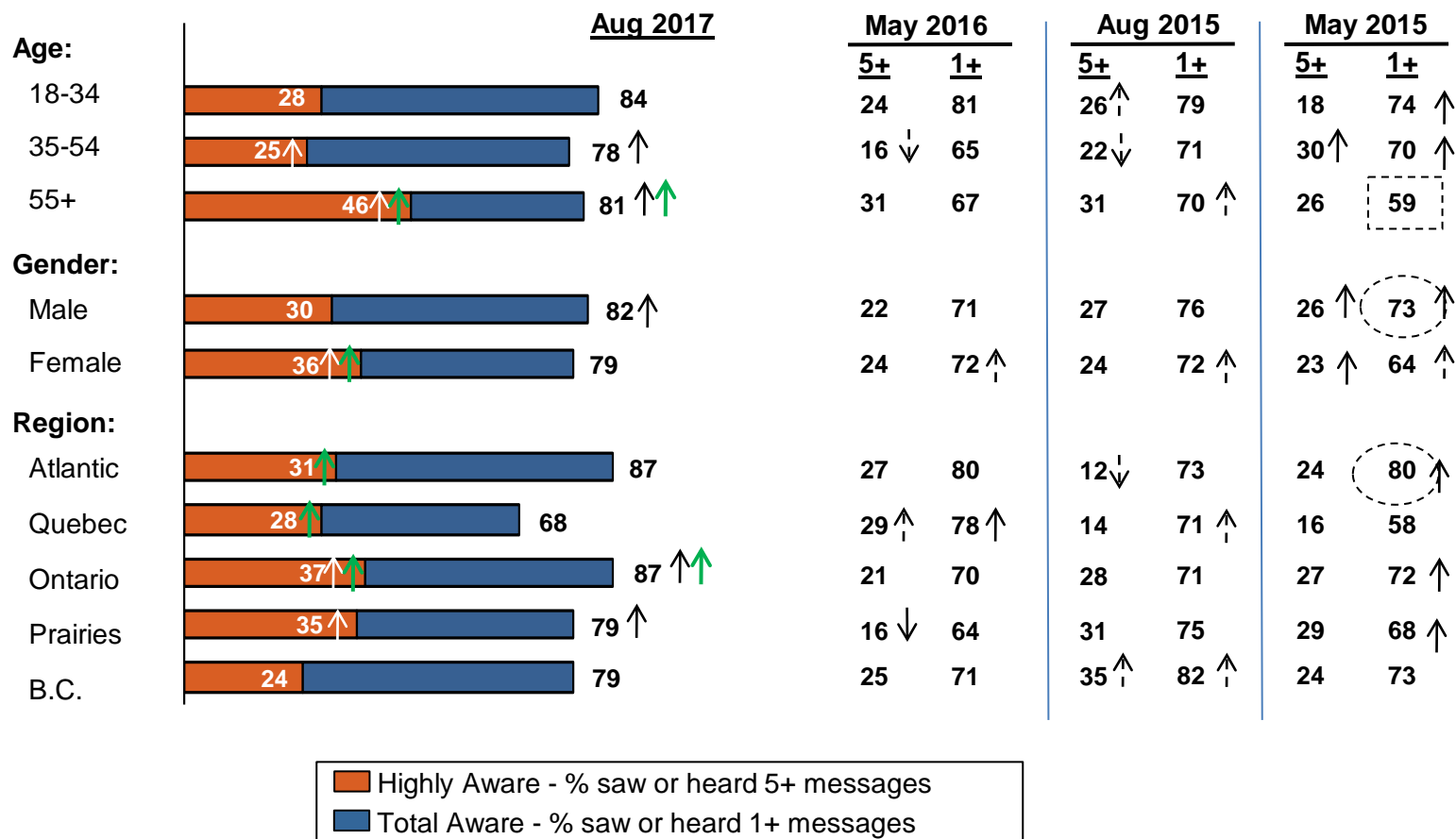
## % of boating activity participants who are Aware of boating safety messages





# All-time highs for campaign in August 2017 are broad-based across age, gender and regions.

## % of boating activity participants who are Aware of boating safety messages



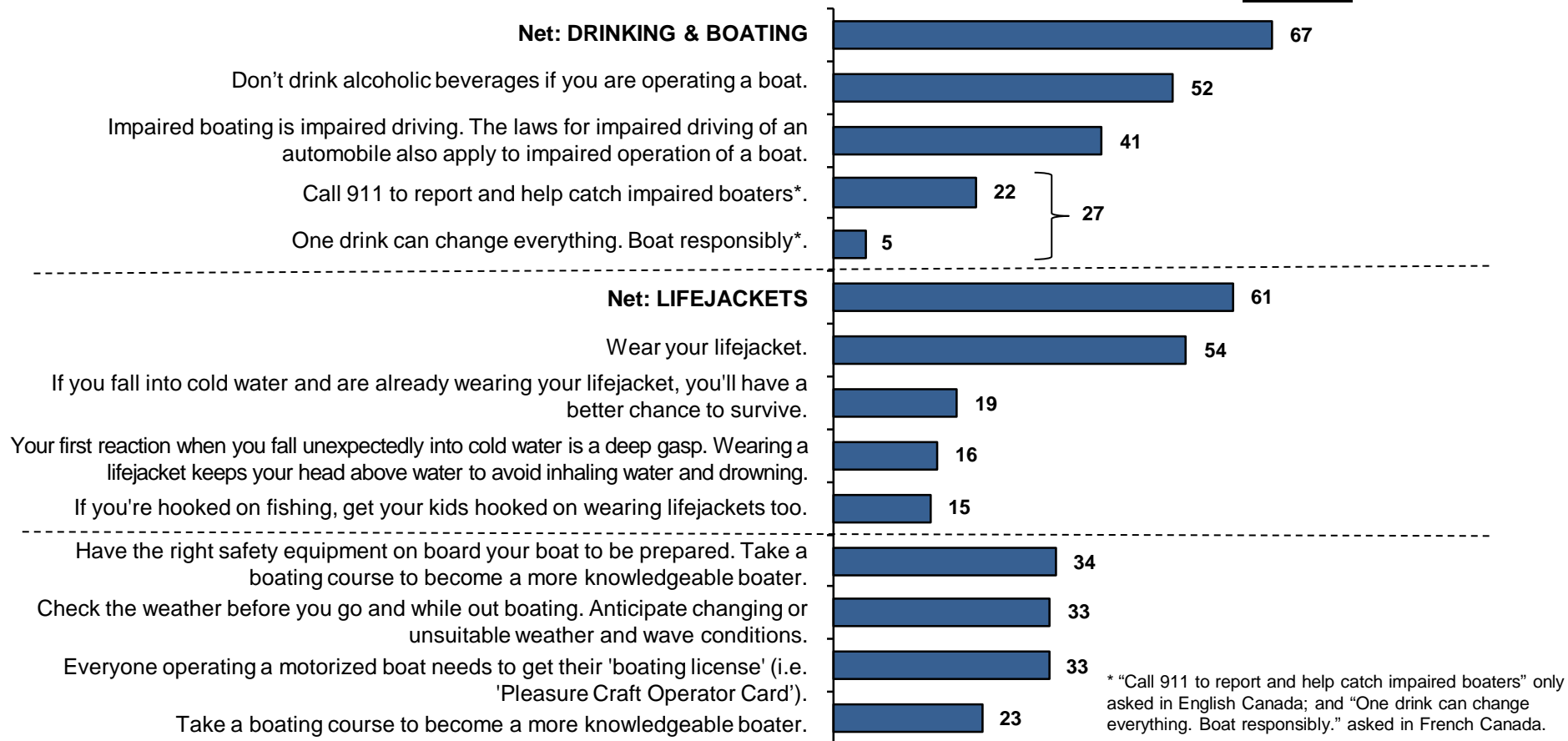


# Very strong awareness in August 2017 for high priority “Don’t drink & boat” and “Wear lifejacket” messages, reaching the majority of boaters.

- Strong traction for “impaired boating is impaired driving” message
- “Have the right safety equipment”, “Check the weather”, “get your boating license” also each reaching one-third of boaters.
- Strong awareness of “Don’t drink and boat” (net) messages among both New Boaters (64%) and Boaters Not Born in Canada (68%). And also strong awareness of “Wear lifejackets(net) messages among New Boaters (63%) and boaters Not Born in Canada (69%).

## % of total boaters who are Aware of each boating safety message (n = 469)

**Aug 2017**

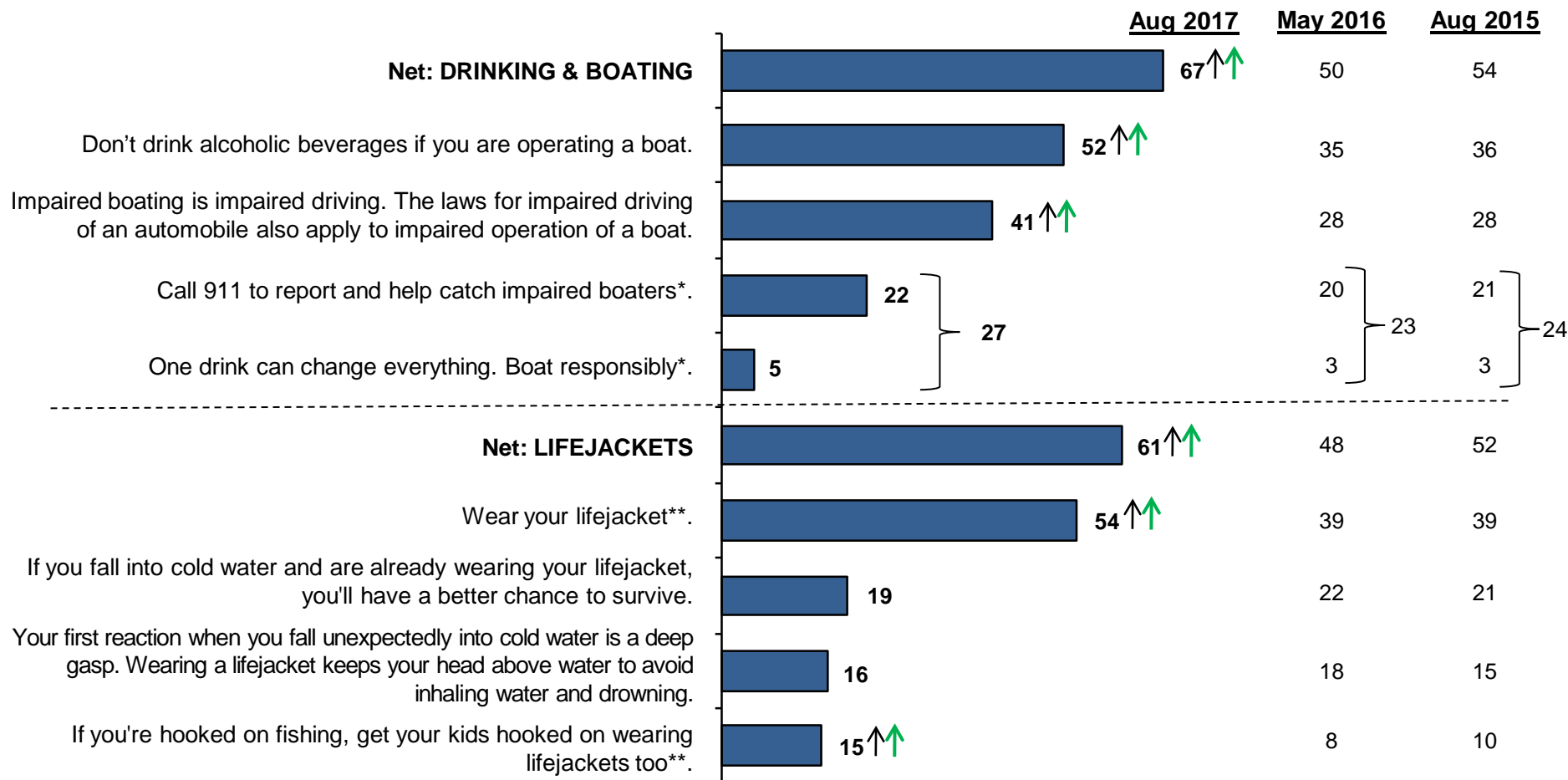


\* “Call 911 to report and help catch impaired boaters” only asked in English Canada; and “One drink can change everything. Boat responsibly.” asked in French Canada.



# Strong increases in awareness for high priority “Don’t drink & boat” and “Wear Lifejacket” messages vs. both May 2016 and August 2015.

% of total boaters who are Aware of each boating safety message (n = 469)



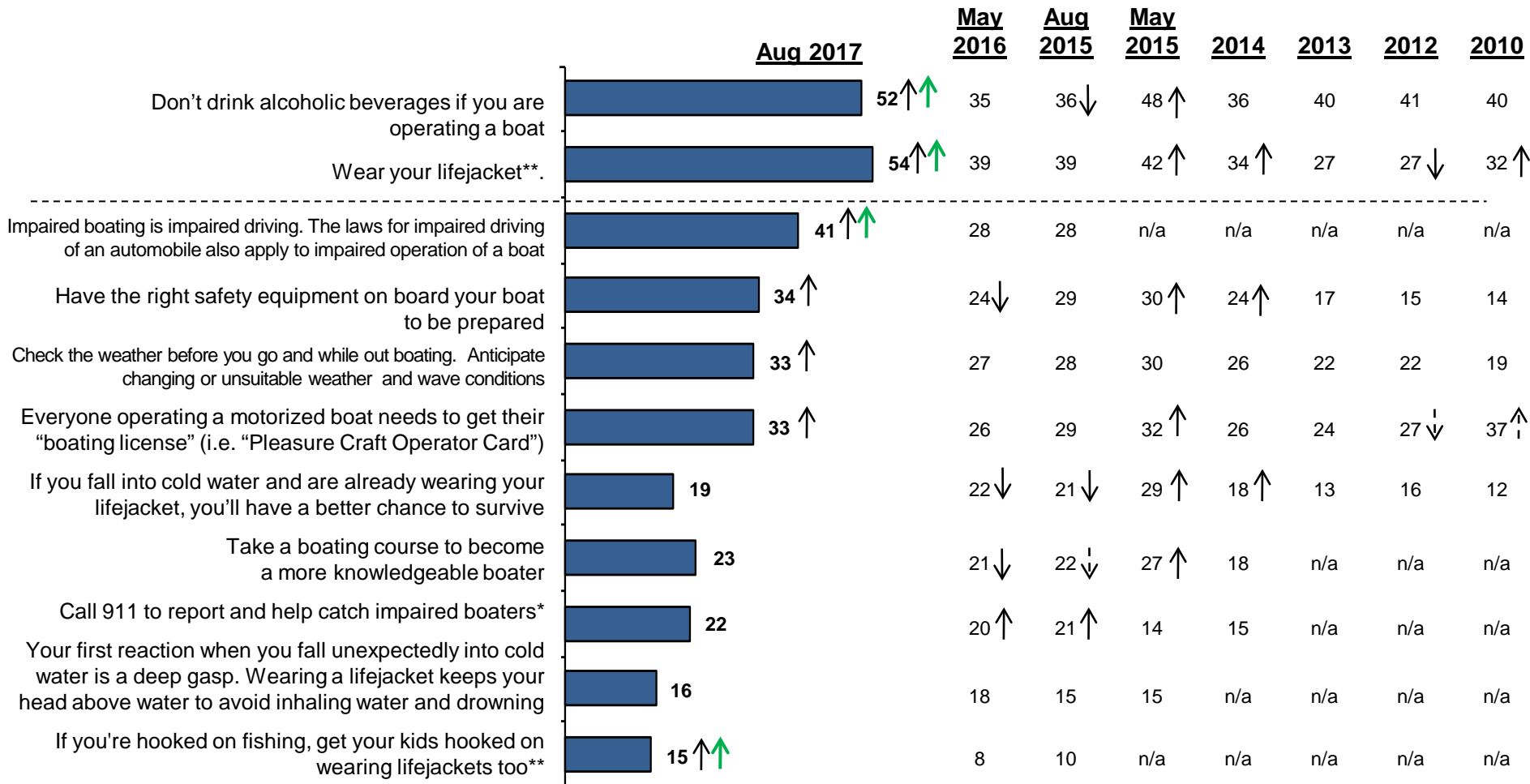
\* “Call 911 to report and help catch impaired boaters” only asked in English Canada; and “One drink can change everything. Boat responsibly.” asked in French Canada.

\*\* Statement wording changed for August 2017.



**Higher 2017 message awareness for “Have the right equipment”, “Check the weather”, “Get your boating license” and “Get kids hooked on lifejackets too”; as well as “Don’t drink & operate boat”, “Wear your lifejacket” and “Impaired boating is impaired driving”. All-time highs for these messages.**

**% of total boaters who are Aware of each boating safety message (n = 469)**



\* Statement change beginning August 2015

\*\* Statement wording change for August 2017

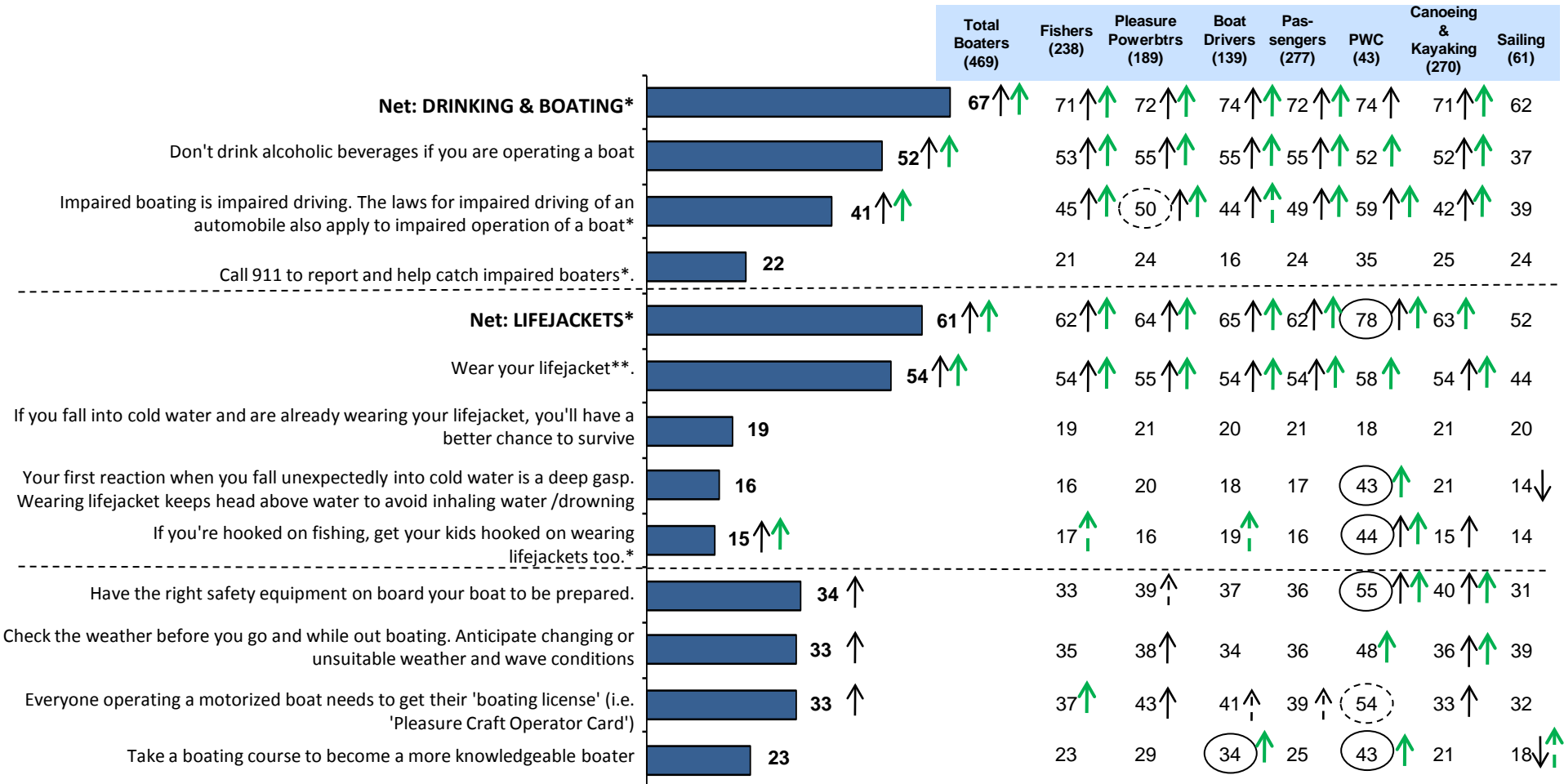
\*Wording of asterisked statements revised for 2014.

\*\*New statements not tracked prior to 2014.



# Stronger 2017 message awareness with Fishers, Pleasure Powerboaters, Boat Drivers & Passengers, PWC riders and Paddlers, for many key messages.

## % of 2017 boating activity participants Aware of each boating safety message



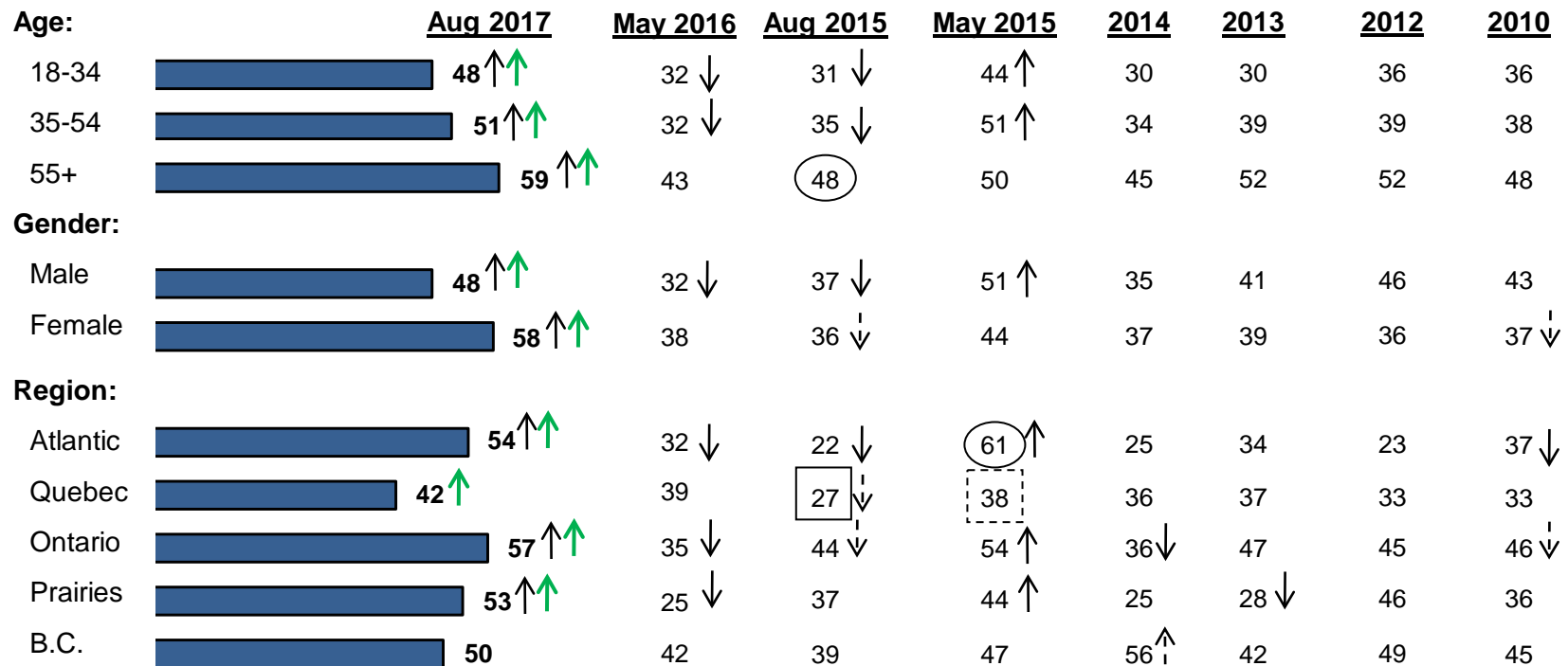
\* New nets / statements beginning August 2015

\*\* Revised statement for August 2017



# Higher awareness of the “Don’t drink & operate boat” message in August 2017 is broad-based – all ages, both male & female, and most regions.

## % of boaters aware of “Don’t drink & operate boat” message

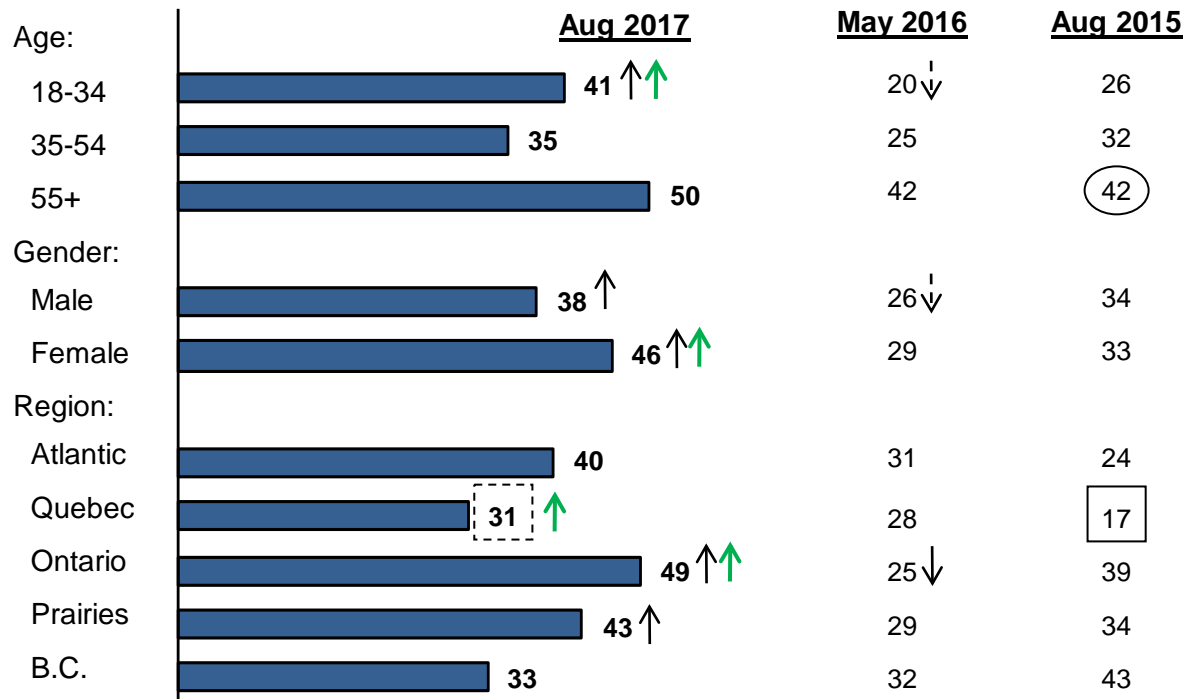




# Higher awareness in August 2017 for “Impaired boating is impaired driving” message, for younger boaters 18-34 yrs, both males & females, and Quebec, Ontario & Prairies regions.

- Awareness of this message remains relatively low in Quebec.
- Also lower awareness of this message with New Boaters (31%).

## % of boaters aware of “Impaired boating is impaired driving” message

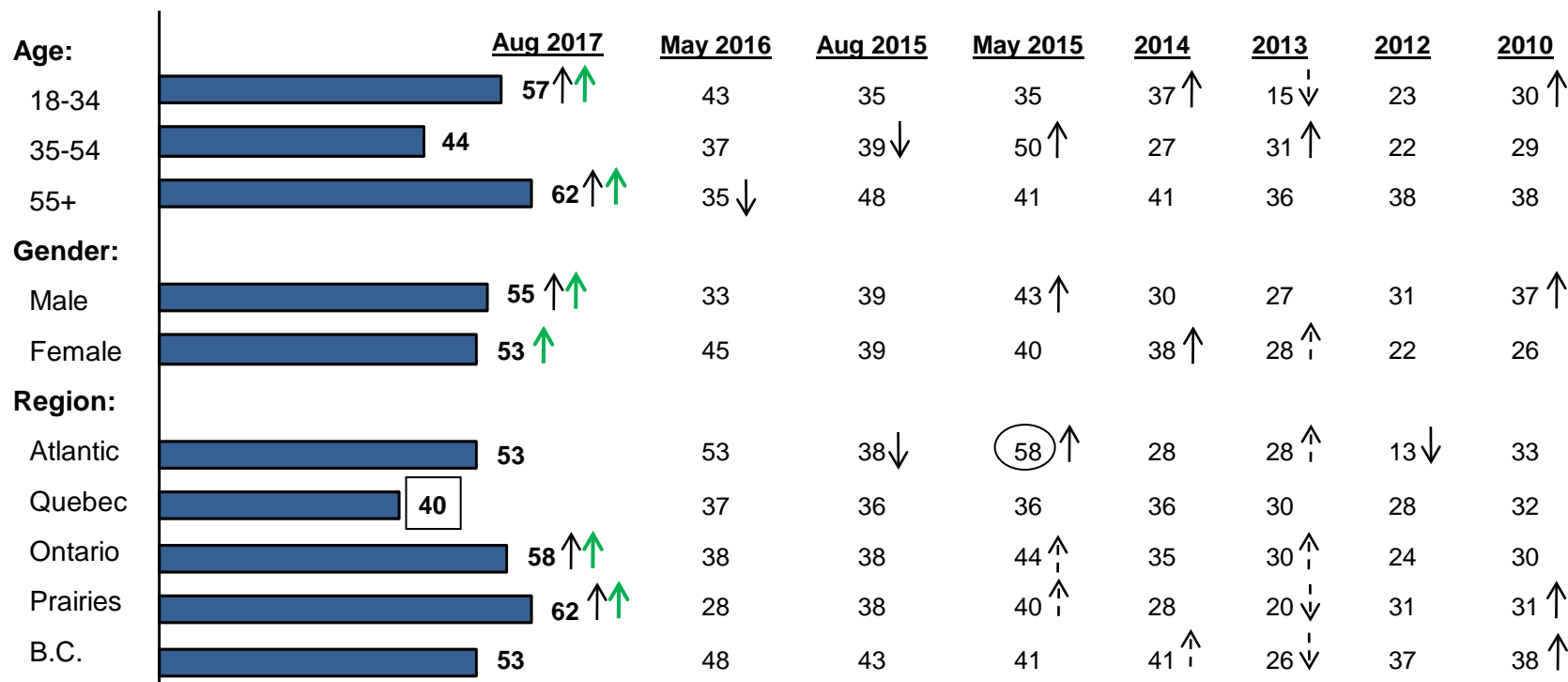






# Higher “Wear your lifejacket” message awareness with 18–34 & 55+ yr olds, males & females, and Ontario & Prairies regions.

## % of boaters aware of “Wear your lifejacket\*” message

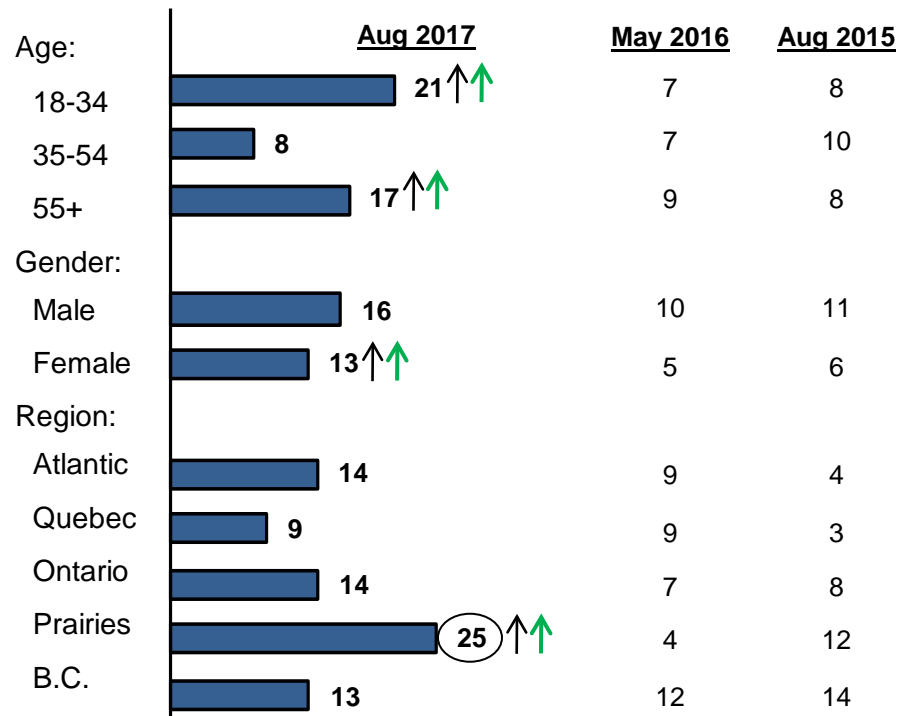


\* Revised statement wording for August 2017



# Increased awareness for “Get kids hooked on lifejackets too” message with boaters 18-34 yrs and 55+ yrs, females and Prairies region.

% of boaters aware of “If you’re hooked on fishing, get your kids hooked on lifejackets too\*” message



\* Revised statement wording for August 2017

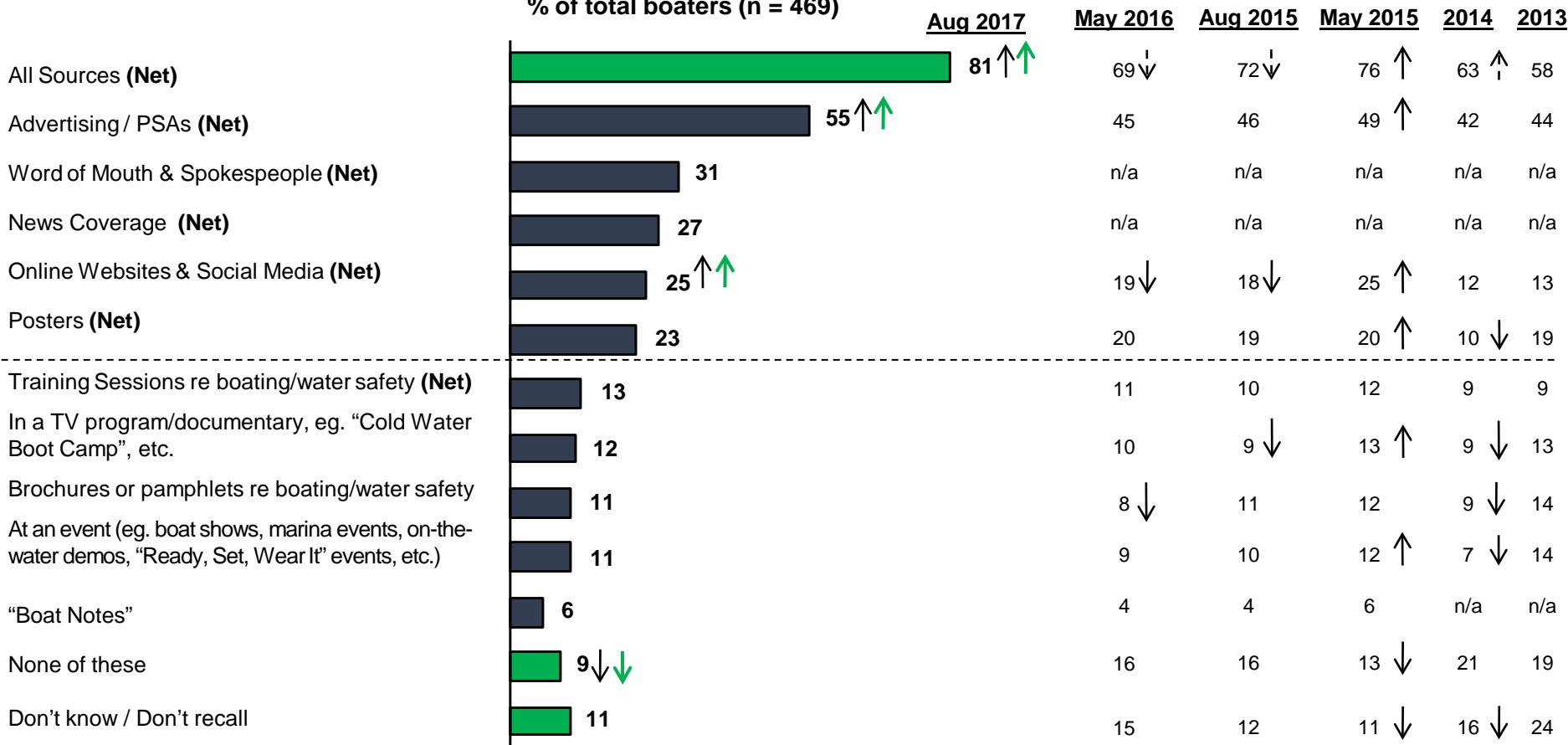


# Sources of Awareness of Safe Boating Messages



# More overall sources of awareness contributing in 2017, with all-time highs for Advertising, and Online Websites & Social Media; also strong News Coverage

**Sources of Awareness for Safe Boating Messages**  
% of total boaters (n = 469)

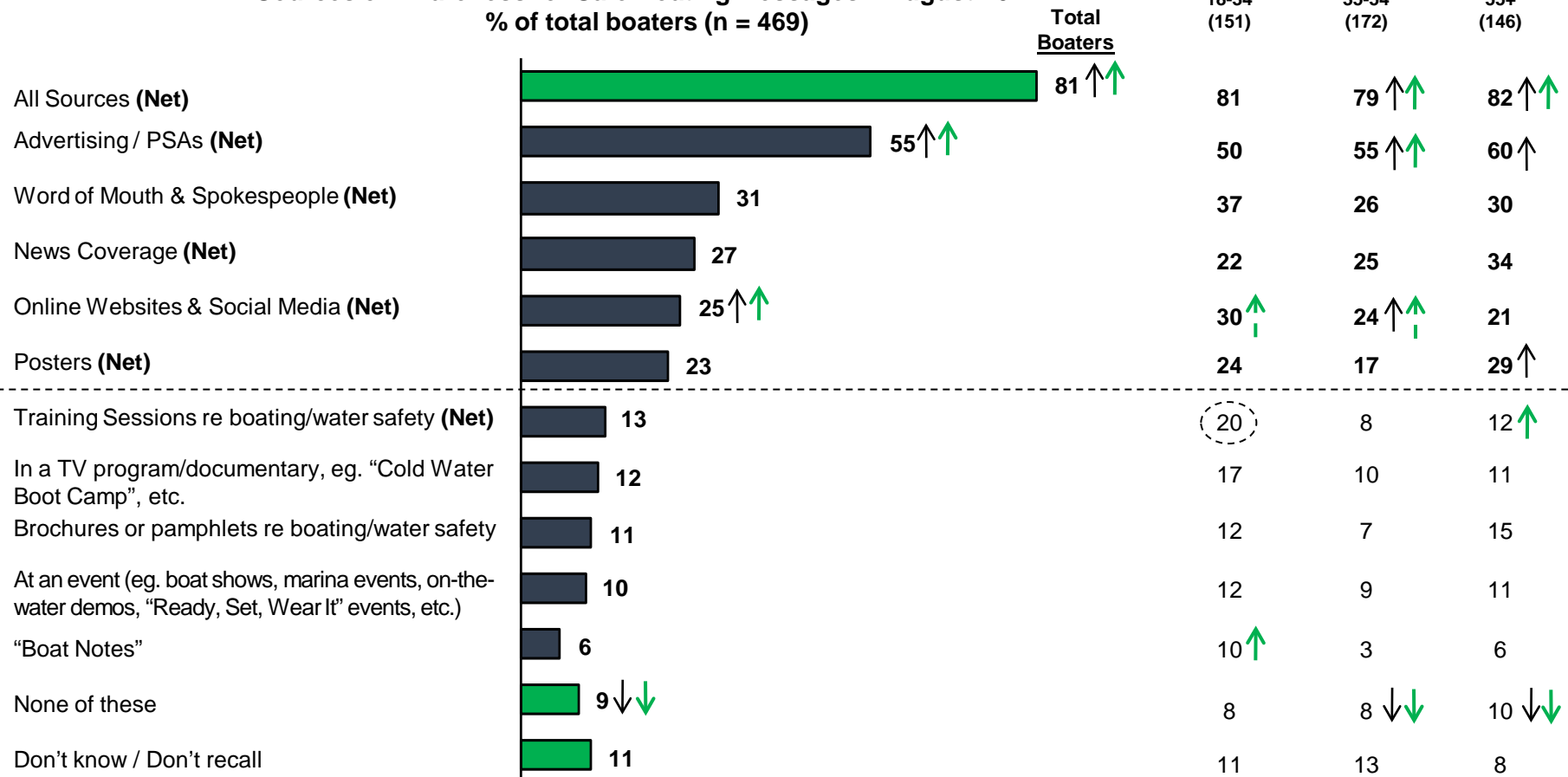




# More sources of awareness for boaters 35-54 yrs, including more Advertising and Online sources; also stronger sources with 55+ yrs, including Advertising & Posters.

**Sources of Awareness for Safe Boating Messages – August 2017**  
 % of total boaters (n = 469)

By Age





## Overall Advertising awareness up in August 2017, tracing to more awareness of Radio ads in particular.

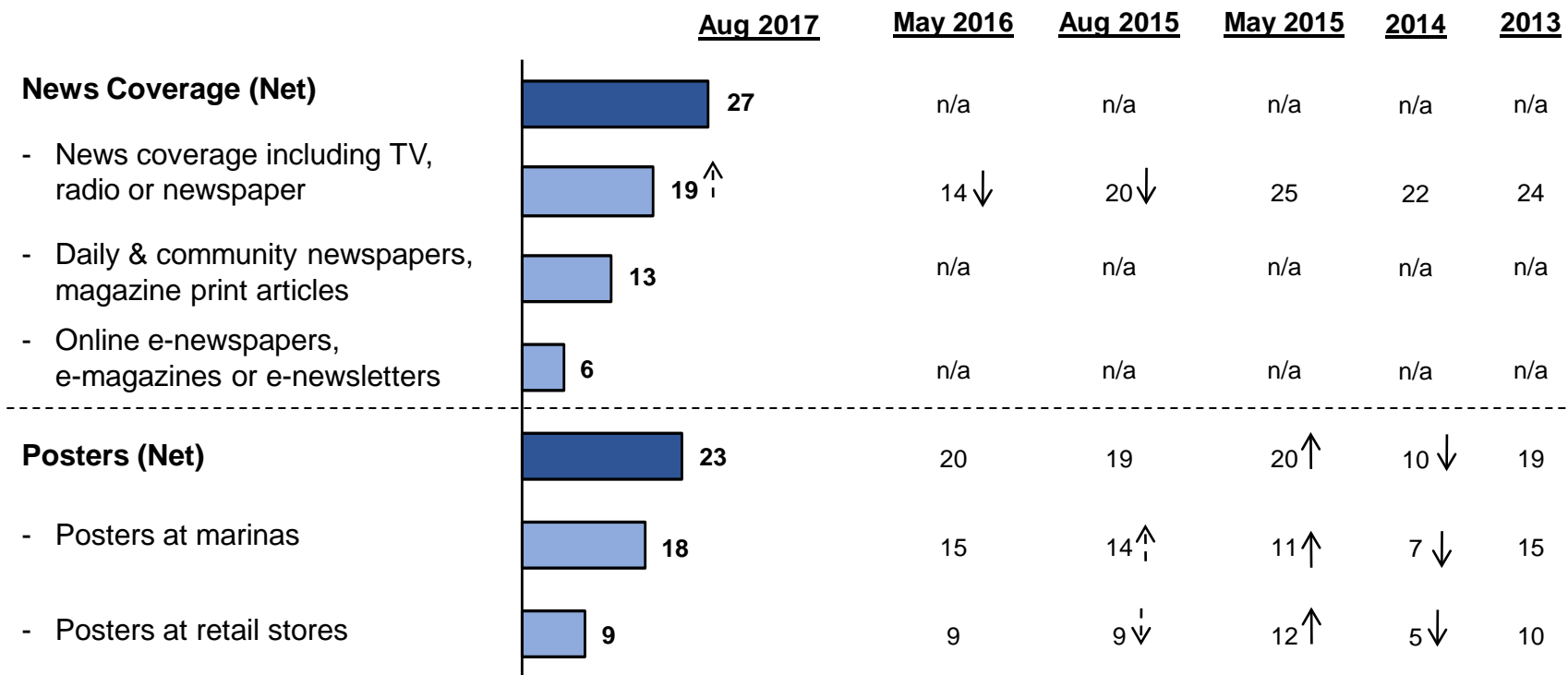
**Sources of Awareness for Safe Boating Messages**  
% of total boaters (n = 469)

	<u>Aug 2017</u>	<u>May 2016</u>	<u>Aug 2015</u>	<u>May 2015</u>	<u>2014</u>	<u>2013</u>
<b>Advertising / PSAs (Net)</b>	55 ↑ ↑	45	46	49 ↑	42	44
- TV ads/PSAs	34	30	31	31 ↑	24 ↓	34
- Radio ads/PSAs	22 ↑ ↑	17	13 ↓	20 ↑	17	18
- Ads on internet/websites	10	10 ↓	8 ↓	20 ↑	9	8
- Magazine ads	11	10	11	10	8	9
- Newspaper ads	9	9	8	12	11	11
- Out-of-home ads (malls, transit, billboards)	8	6 ↓	7	11	7	9



# More News Coverage in August 2017 than May 2016; in-line with August 2015.

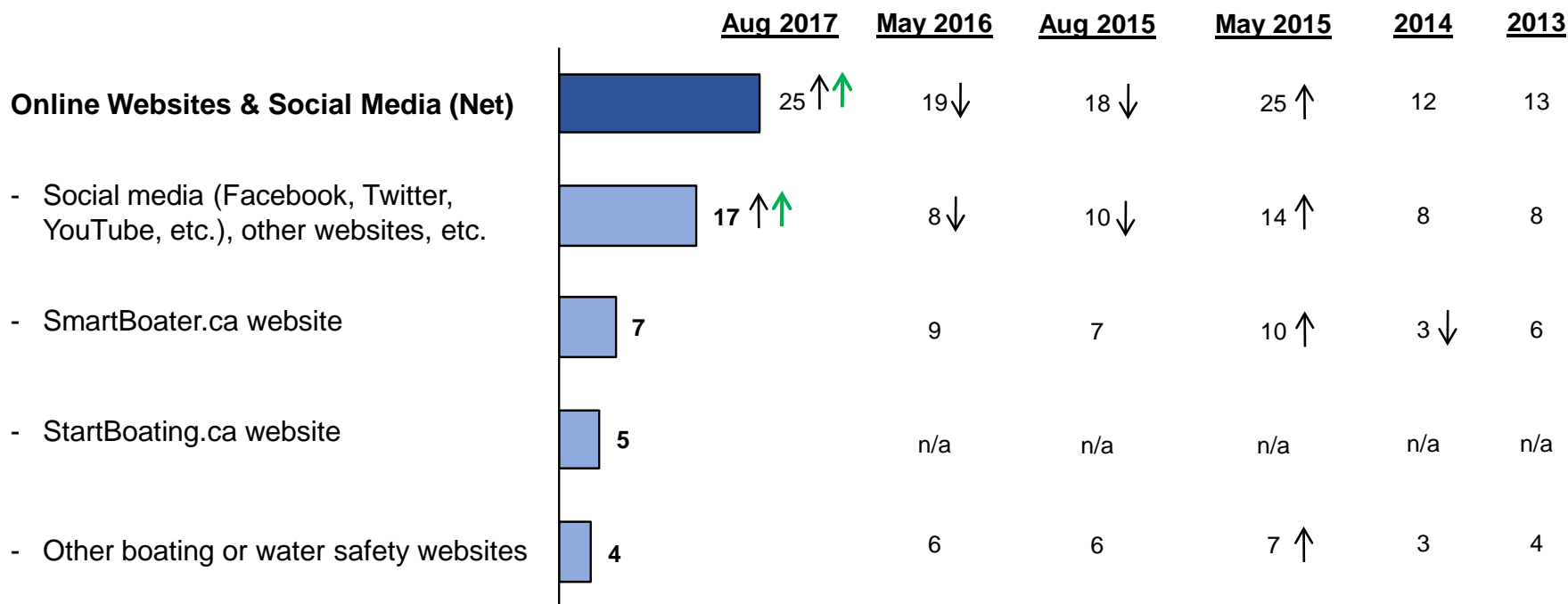
**Sources of Awareness for Safe Boating Messages**  
% of total boaters (n = 469)





## More Online awareness in August 2017, reflecting more Social Media recall.

Sources of Awareness for Safe Boating Messages  
% of total boaters (n = 469)

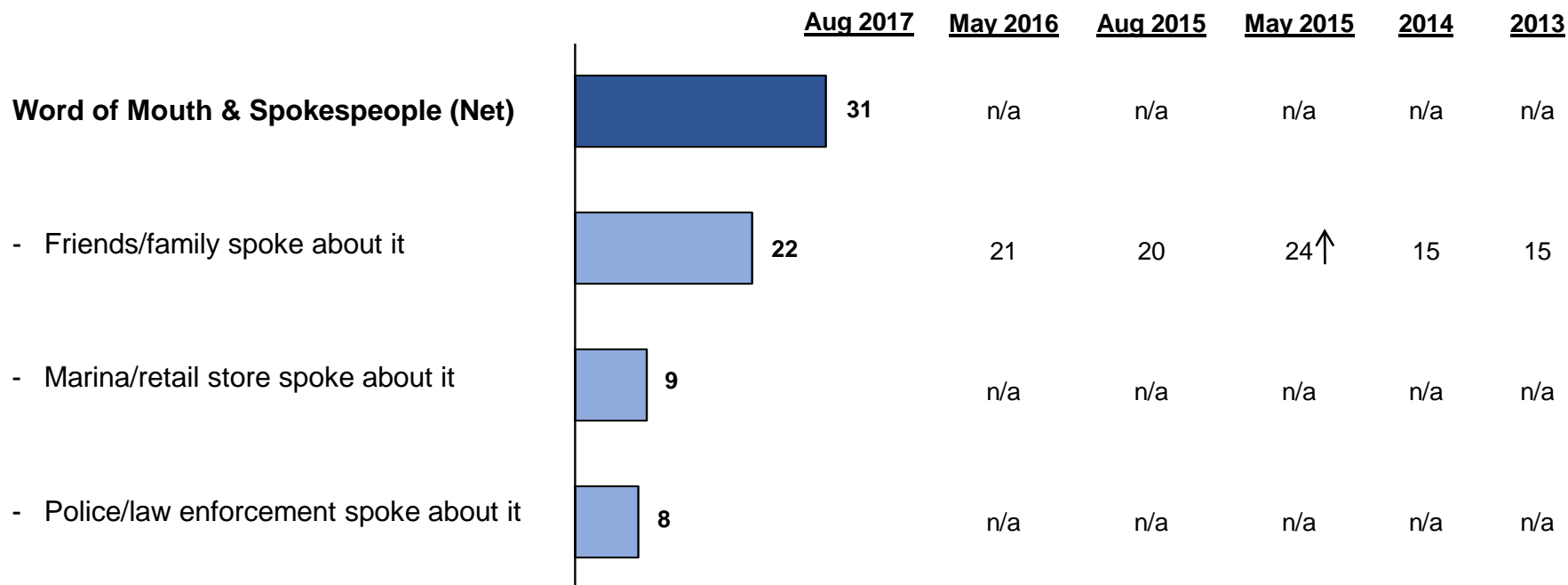






# Word of Mouth and Spokespeople are strong contributors to awareness of safe boating messages – especially word of mouth from friends and family, which continues at a similar level as in 2016 & 2015

**Sources of Awareness for Safe Boating Messages**  
% of total boaters (n = 469)

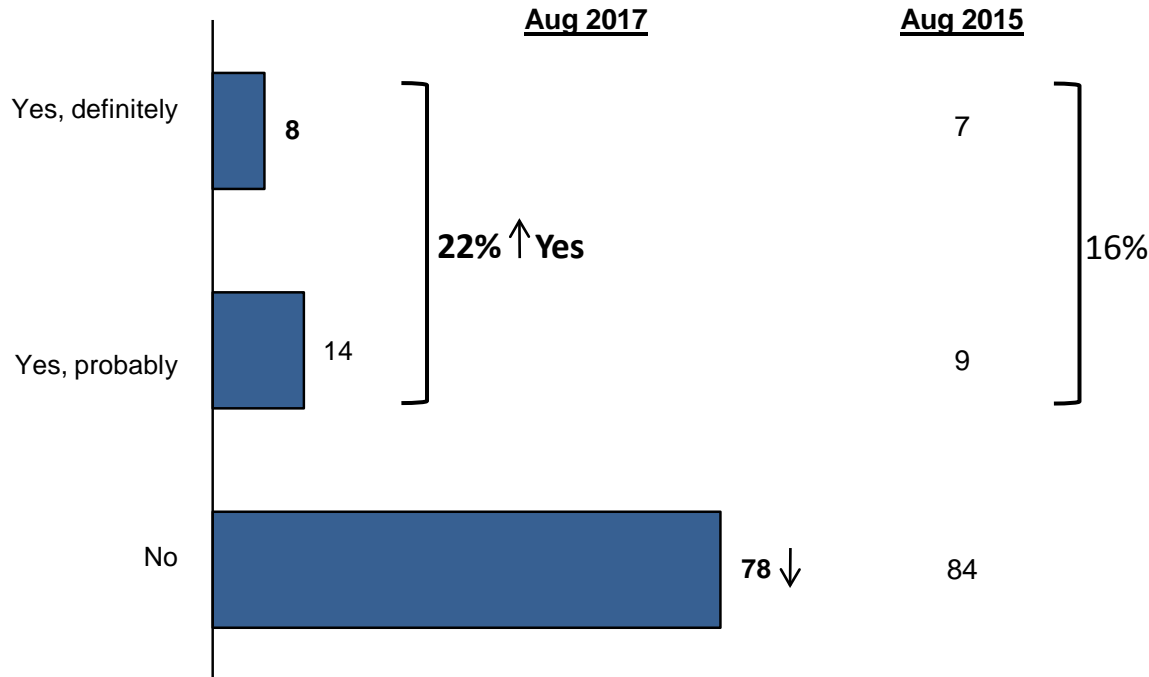




# Almost one-quarter (22%) of boaters recall seeing the “Help us Catch Impaired Boaters” (English) and “One Drink can Change Everything” (French) ads / posters – up from 16% in August 2015. Awareness improved in 2017 in French Canada, up to English Canada level.

- Higher awareness with 18-34 yrs, Fishers, Pleasure Powerboaters, Powerboat Drivers & PWC Riders
- Very high awareness with New Boaters (40%); low awareness with Interested Non-Boaters (5%)

Ad / Poster awareness – % of total boaters (n = 469)

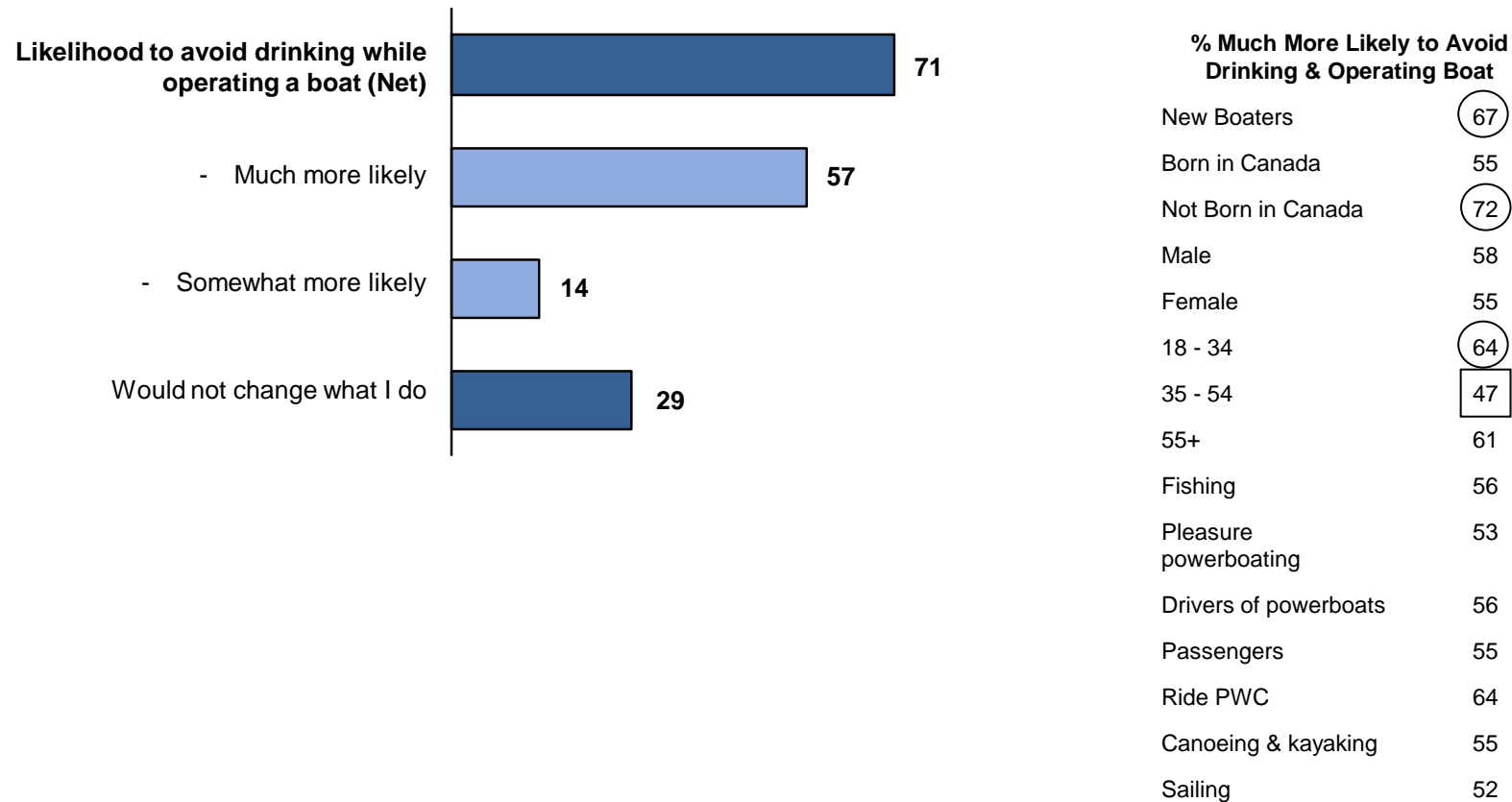


	Net: Yes: Definitely / probably
Total Boaters & Interested Non-Boaters	16
Boaters	22 ↑
Interested Non-Boaters	6
New Boaters	40
Born in Canada	16
Not Born in Canada	17
English	16
French	15 ↑
Male	18
Female	14
18 - 34	22
35 - 54	13
55+	12
Fishing	23 ↑
Pleasure powerboating	22 ↑
Drivers of powerboats	24 ↑
Passengers	21
Ride PWC	34
Canoeing & kayaking	21
Sailing	27



The potential to be reported via “9-1-1” motivates the majority of boaters (57%) to be much more likely to avoid drinking while operating a boat – across all boating activities; especially younger boaters 18-34 yrs of age, New Boaters and boaters Not Born in Canada.

**Likelihood of Changing Behaviours re Drinking & Operating Boat after seeing “Call 9-1-1” Poster – English Canada boaters (n = 421)**

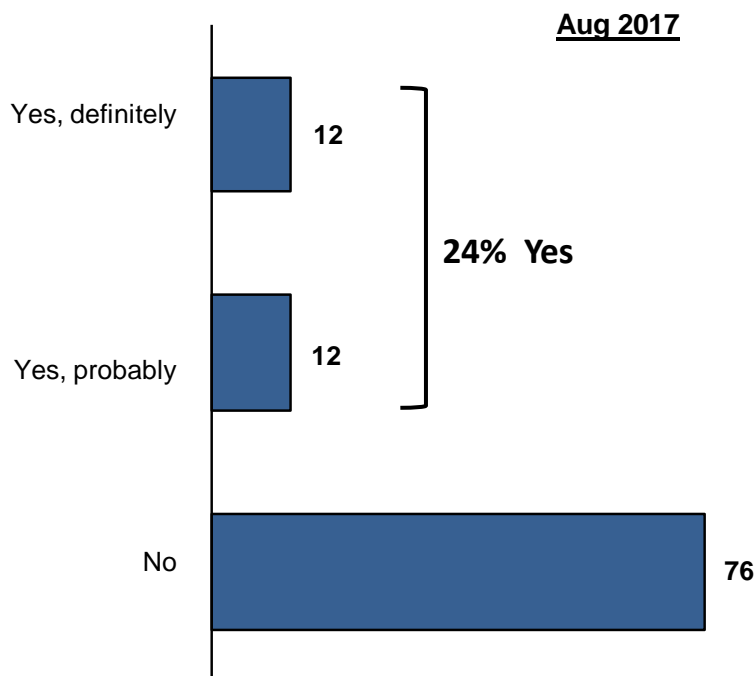




## About one-quarter (24%) of boaters say they saw the 2017 CSBC “Tired of Waiting” Lifejacket transit shelter/mall posters/ads.

- Including more than one-third of New Boaters (38%).
- Strong awareness across most boating activity sub-groups.
- Little awareness (7%) among Interested Non-Boaters.

“Tired of Waiting” Ad / Poster awareness – % of total boaters (n = 469)

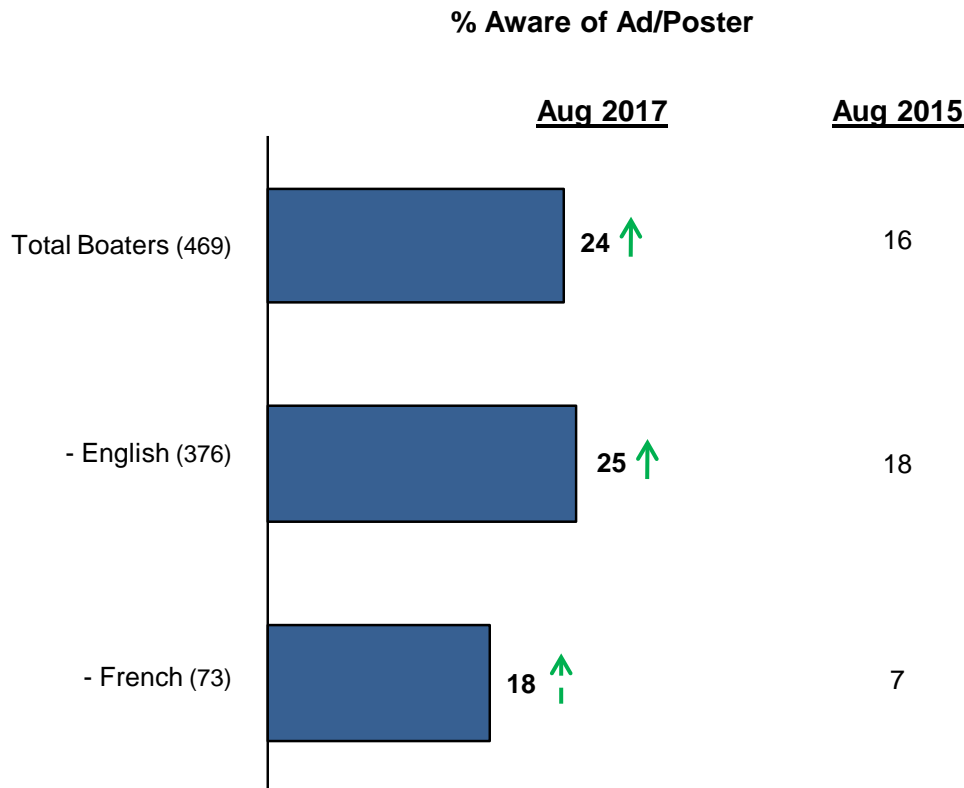


	Net: Yes: Definitely / probably
Total Boaters & Interested Non-Boaters	18
Boaters	24
Interested Non-Boaters	7
New Boaters	38
Born in Canada	18
Not Born in Canada	16
English	19
French	11
Male	21
Female	14
18 - 34	24
35 - 54	15
55+	13
Fishing	25
Pleasure powerboating	25
Drivers of powerboats	36
Passengers	23
Ride PWC	45
Canoeing & kayaking	25
Sailing	35



## Higher awareness achieved with boaters in August 2017 for the “Tired of Waiting” lifejacket poster, vs. August 2015 for the “Help us Catch Impaired Boaters” (English) & “One Drink can Change Everything” (French) posters.

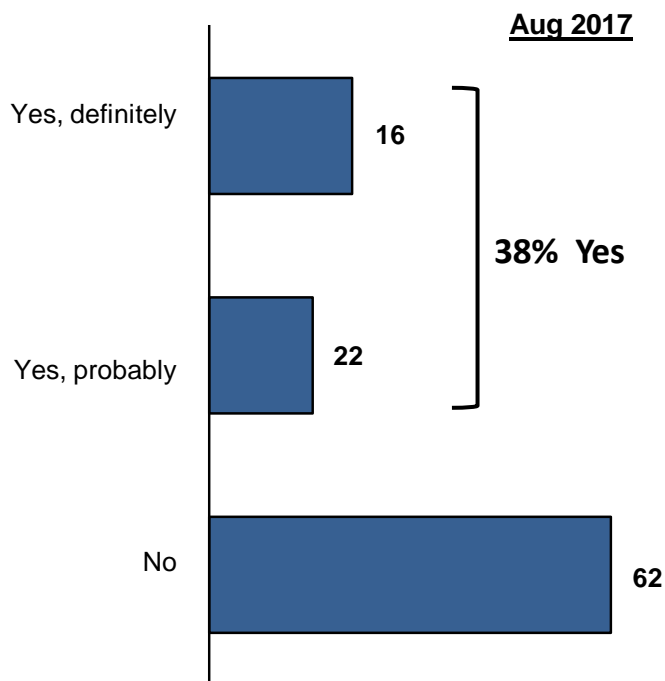
- Stronger awareness in August 2017 with both English and French boaters





**Over one-third (38%) of boaters recall seeing daily / community newspaper and magazine articles on an aided “example” basis. Aided awareness was highest with New Boaters and PWC Riders.**

**Ad / Poster awareness – % of total English Canada boaters (n = 421)**



	Net: Yes: Definitely / probably
Total English Canada Boaters & Interested Non-Boaters	36
Boaters	38
Interested Non-Boaters	33
New Boaters	49
Born in Canada	38
Not Born in Canada	30
Male	35
Female	37
18 - 34	37
35 - 54	35
55+	37
Fishing	42
Pleasure powerboating	40
Drivers of powerboats	38
Passengers	42
Ride PWC	61
Canoeing & kayaking	38
Sailing	30



# Safe Boating Attitudes/Behaviours



# Strong (top-2-box) majority boater intent/support for desired safe boating attitudes & behaviours re: drinking & boating, wearing lifejackets, preparedness and cold water, and boating education beyond PCOC.

## Desired Safe Boating Attitudes/Behaviours - % agree they are doing or intend to do this year (n=469)

Aug 2017

### Drinking & boating:

I am not going to drink any alcoholic beverages while operating a boat



I am not going to operate a boat after I have consumed alcoholic beverages



I am going to call 9-1-1 to report an impaired boater if I see one



### Wearing your PFD:

I am going to strongly encourage everyone else who is out in a boat with me to wear their lifejacket



I will wear my lifejacket all the time when I'm out on the water in a boat



### Preparedness:

I will always check my boat over every time before I go out on the water; including making sure I have enough lifejackets on board



I'm going to mentally run through a pre-departure checklist, every time I go out on the water



### Cold water:

I'm going to make a point of being better prepared for the possibility of falling into cold water, by wearing my lifejacket



### Boating education:

I'm going to make a point of getting more information, or taking a boating course to become a more knowledgeable boater



I already have my "boating license" (ie. Pleasure Craft Operator Card)



I have already taken a boating course or training beyond the "boating license" (PCOC) level



I don't have my "boating license" (Pleasure Craft Operator Card) yet, but I'm going to get it this year



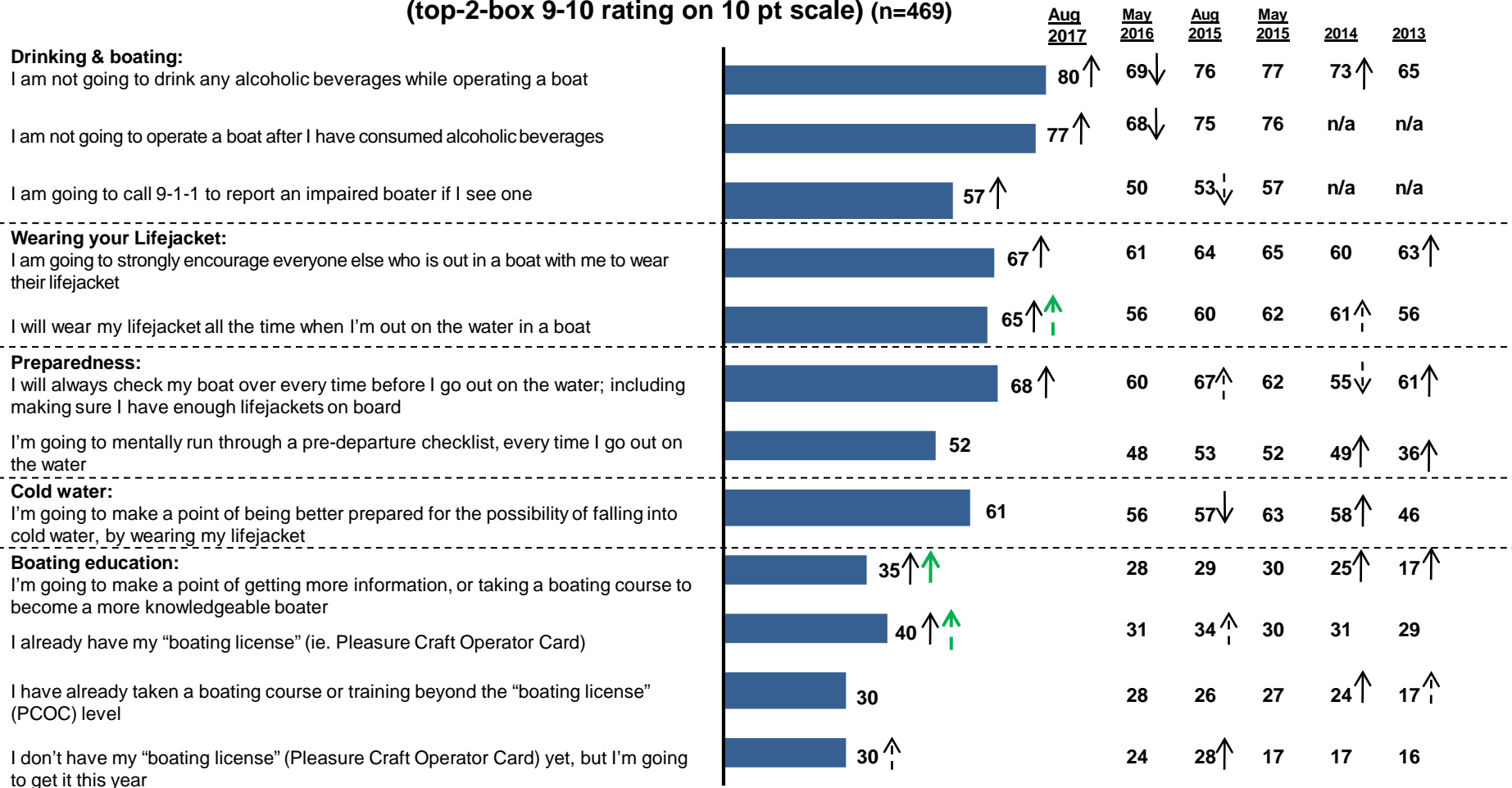
■ % strongly agree – top-2-box 9-10 rating on 10 pt scale  
■ % agree – 6-10 rating on 10 pt scale





# Increased intent to Wear lifejacket and Get more info/take boating courses vs August 2015. Also increased intent to Not drink & boat, Advocate for lifejacket wearing, Check boat and Get PCOC vs May 2016.

## Desired Safe Boating Attitudes/Behaviours - % strongly agree they are doing or intend to do this year (top-2-box 9-10 rating on 10 pt scale) (n=469)

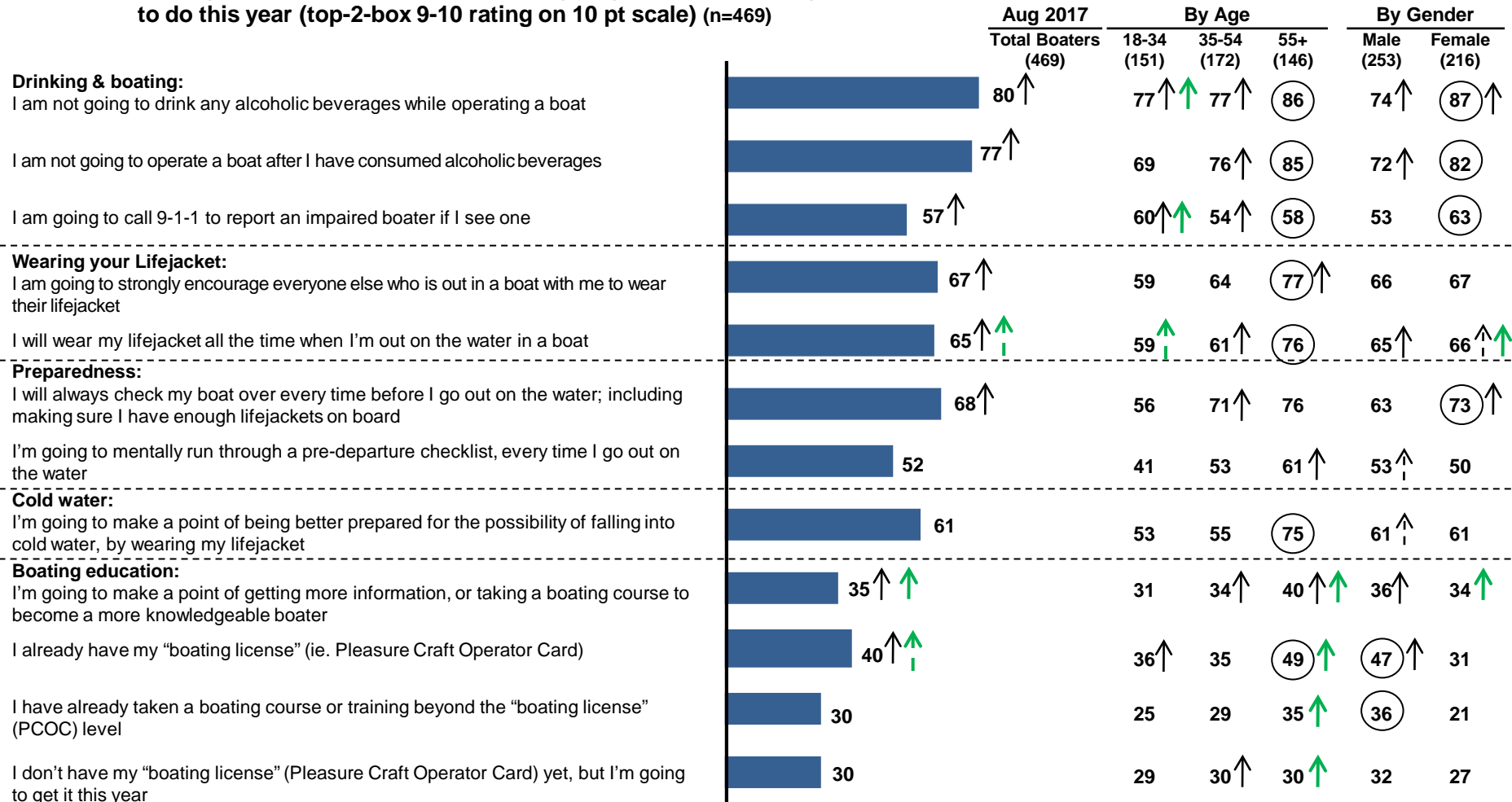


↑↓ = increase or decrease versus August 2015



# Stronger drinking & boating attitudes/behaviours among boaters 18-34 yrs, 35-54 yrs and males. Stronger intent to wear lifejackets across age groups and both genders.

**Desired Safe Boating Attitudes/Behaviours - % strongly agree they are doing or intend to do this year (top-2-box 9-10 rating on 10 pt scale) (n=469)**





## Other Sub-group Differences in Safe Boating Attitudes/Behaviours

### By Boating Activities:

- In 2017 the overall boater improvement in drinking & boating intentions/ behaviours, traces to both powerboaters and non-powerboaters/paddlers:
  - More powerboaters (especially fishers) strongly agree they will 'not drink alcoholic beverages while operating a boat' in August 2017 (78%) versus May 2016 (69%).
    - Similarly, more non-powerboaters (especially paddlers) also strongly agree they will 'not drink alcoholic beverages while operating a boat' in August 2017 (80%) versus May 2016 (72%).
  - More powerboaters strongly agree in August 2017 (78%) vs. May 2016 (70%) they will 'not operate a boat after drinking alcoholic beverages'. Including increases for fishers, pleasure powerboaters and PWC riders.
    - Similarly, more non-powerboaters also strongly agree they will 'not operate a boat after drinking alcoholic beverages' in August 2017 (75%) versus May 2016 (69%).
- The 2017 overall improvement in boater intentions to wear lifejackets traces especially to fishers and pleasure powerboaters. More fishers/pleasure powerboaters strongly agree they will :
  - 'Wear their lifejacket all the time' (67%/60% in August 2017 vs. 58%/48% in May 2016).
  - 'Strongly encourage everyone else who is out in a boat with them to wear their lifejacket' (69%/63% in August 2017 vs. 61%/54% in May 2016).



## Other Sub-group Differences in Safe Boating Attitudes/Behaviours

### By Region:

- In 2017 the overall boater improvement in drinking & boating intentions/ behaviours, traces to Quebec and the West:
  - More Quebec/Prairies/B.C. boaters strongly agree they will 'not drink alcoholic beverages while operating a boat' in August 2017 (79%/76%/72%) versus May 2016 (67%/61%/61%).
  - More Quebec/Prairies/B.C. strongly agree in August 2017 (77%/79%/81%) vs. May 2016 (62%/60%/62%) they will 'not operate a boat after drinking alcoholic beverages'.
- The 2017 overall improvement in boater intentions to wear lifejackets traces especially to Quebec and the Prairies, where more boaters strongly agree they will :
  - 'Wear their lifejacket all the time' (75%/70% in August 2017 vs. 57%/50% in May 2016).
  - 'Strongly encourage everyone else who is out in a boat with them to wear their lifejacket' (77%/66% in August 2017 vs. 63%/56% in May 2016).

### New Boaters:

- There is no difference vs. all Boaters in the attitudes/intentions of New Boaters re: not drinking and boating and re: wearing lifejackets.

### Boaters Not Born in Canada:

- Boaters Not Born in Canada are significantly more likely to strongly agree they will 'not drink alcoholic beverages while operating a boat' (88% in August 2017 vs. 80% for all Boaters) and strongly agree they will 'not operate a boat after drinking alcoholic beverages' (86% in August 2017 vs. 77% for all Boaters).
- With regards to lifejacket wearing, there is no significant difference between the attitudes / intentions of boaters Not Born in Canada vs. all Boaters.

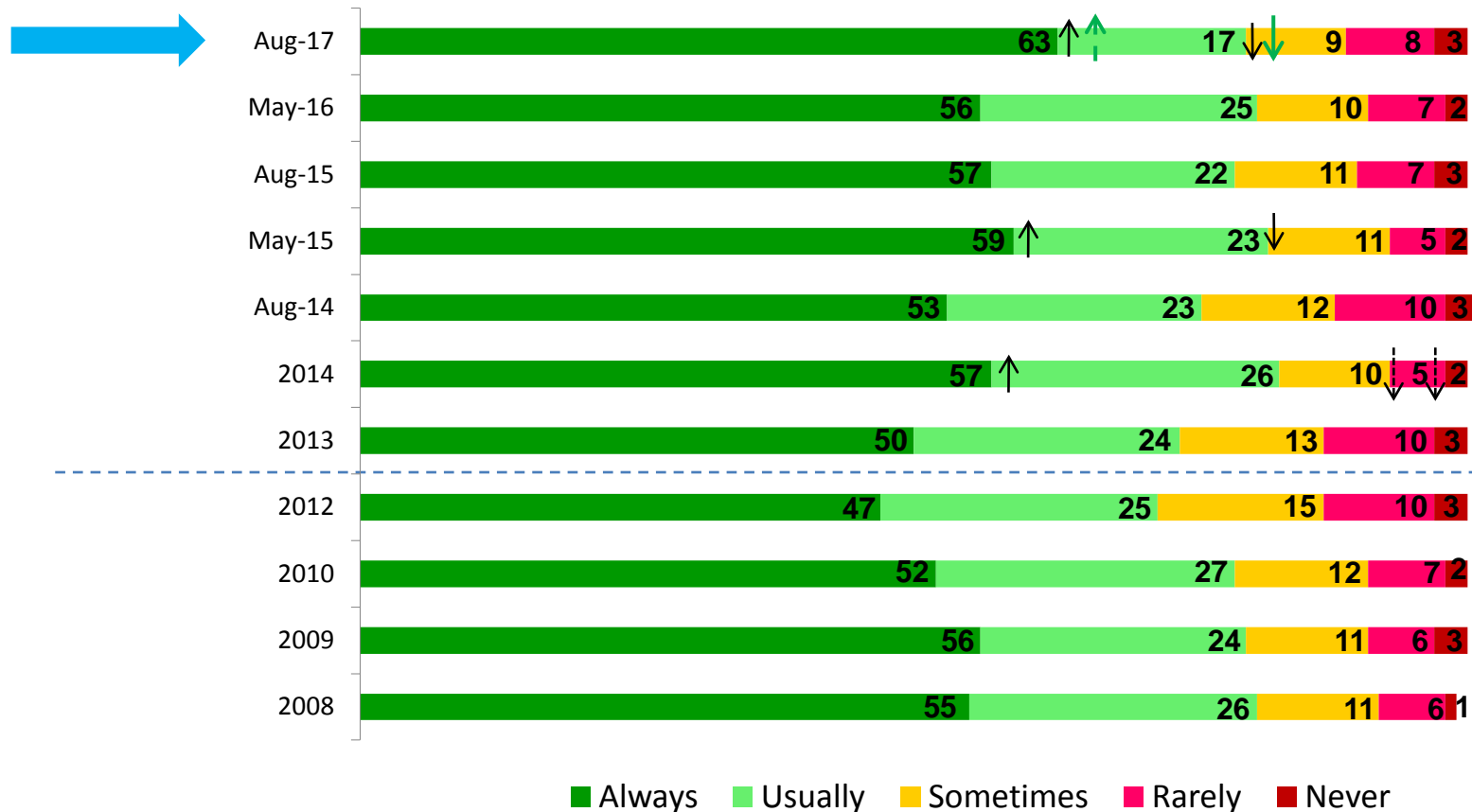


# Wearing Lifejackets



# All-time high in August 2017 for proportion of boaters (63%) who say they 'Always' wear their lifejacket.

## How often boaters say they wear a lifejacket % of total boaters (n=469)



↑↓ = increase or decrease versus August 2015

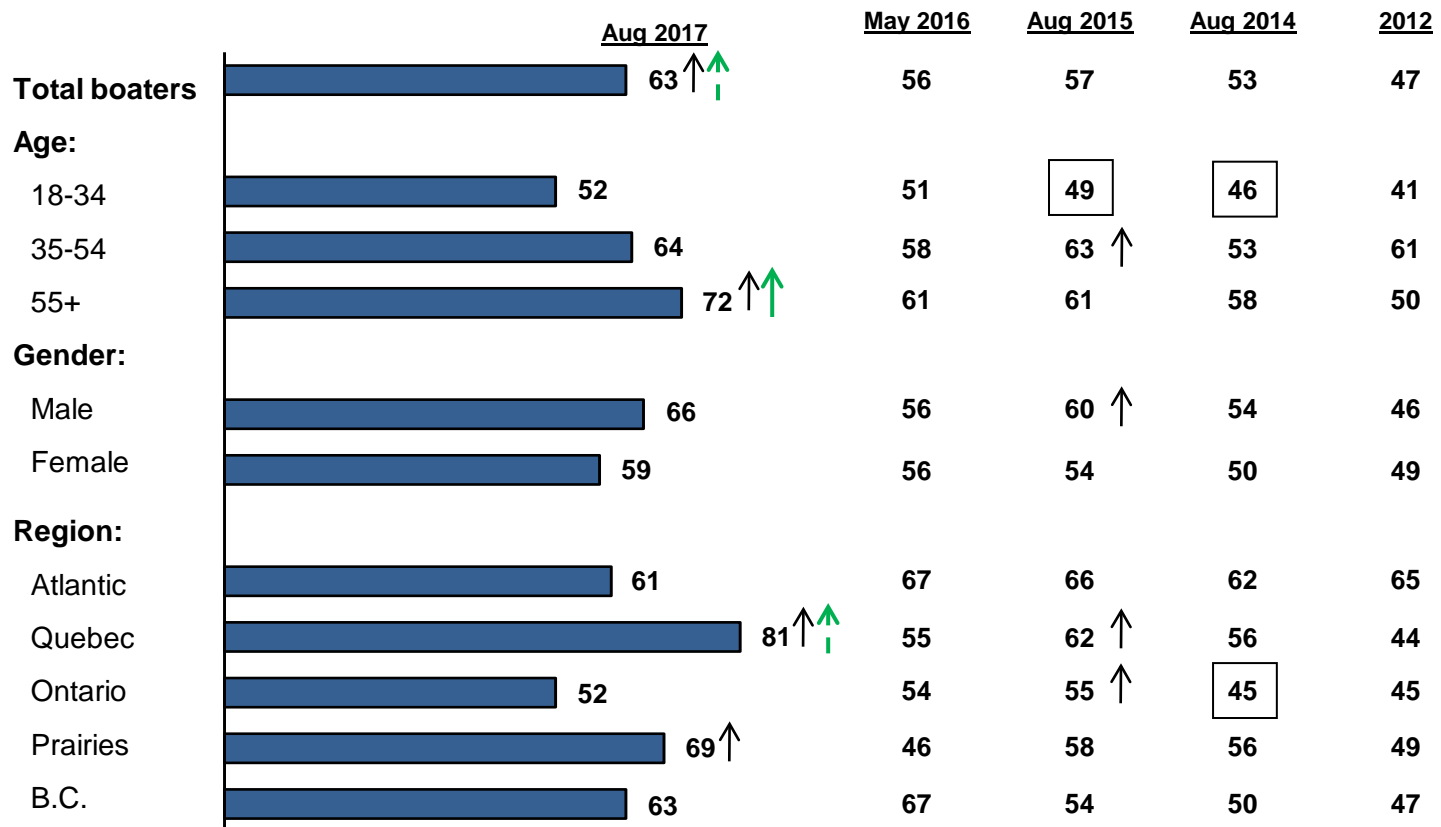
\* 2008 – 2014 research conducted in May each year



# Regionally, increase in lifejacket wearing in Quebec and Prairies; and with boaters 55+ yrs.

- New Boaters more likely to “Always” wear lifejacket (72%).

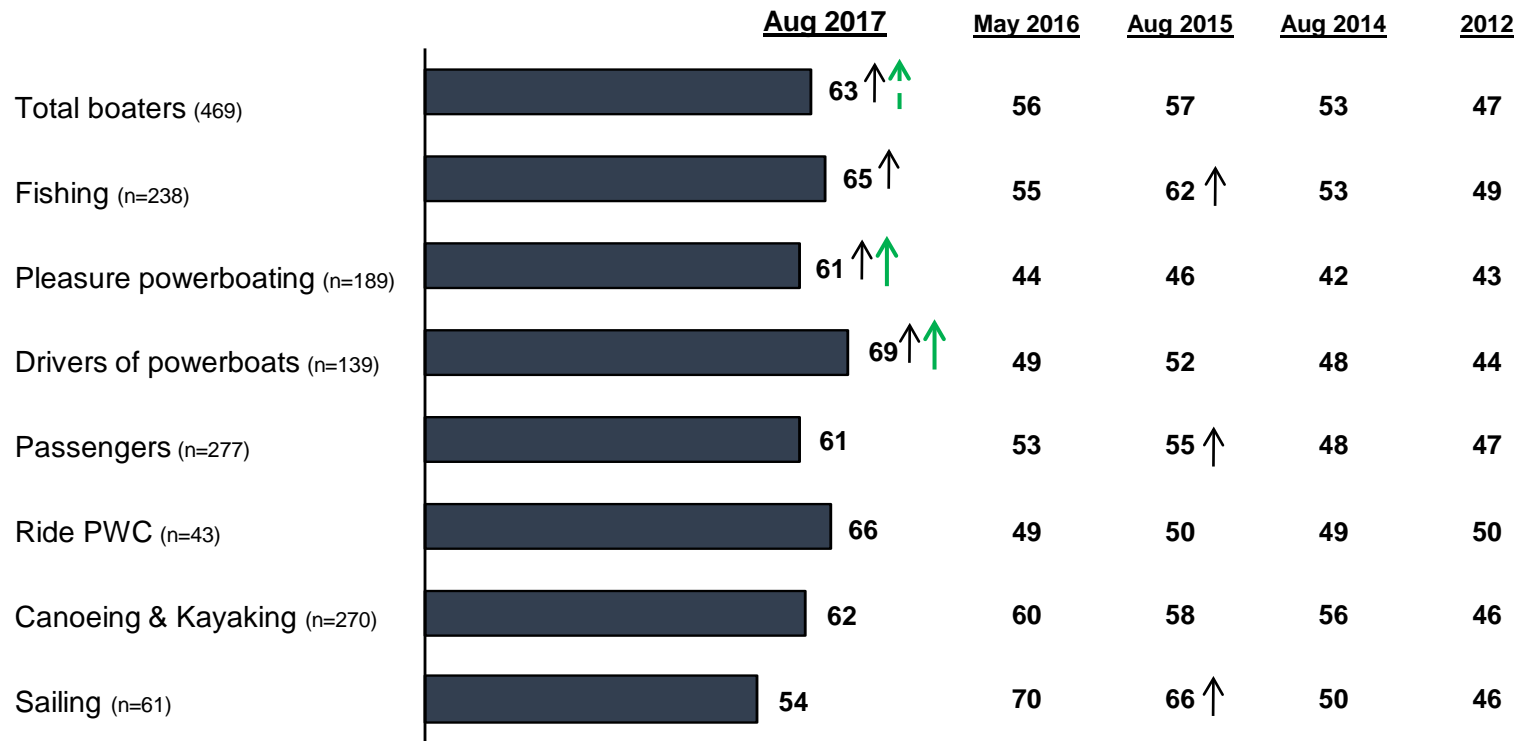
## % of boaters in each sub-group who say they “Always” wear a lifejacket when out in a boat





# Increased lifejacket wearing for Pleasure Powerboaters, Drivers of powerboats and Fishers

% of boating activity participants who say they “Always” wear a lifejacket

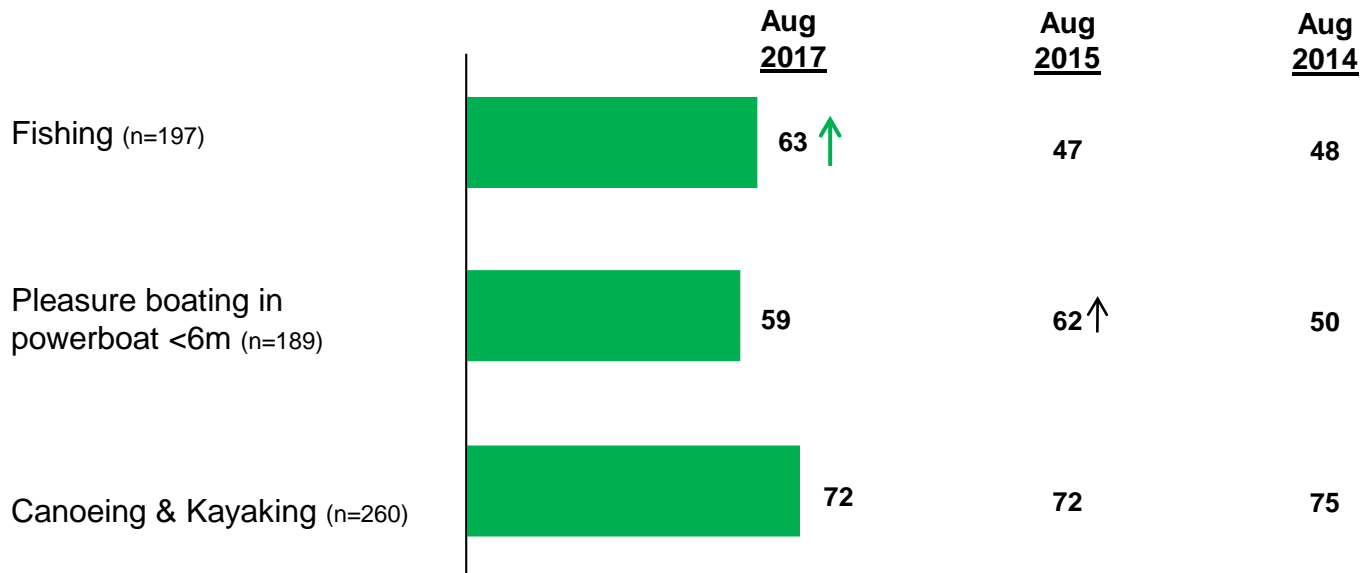






**By activity, more Fishers who say they ‘Always’ wear a lifejacket in 2017 compared to 2015; no change for those pleasure boating in powerboats <6 metres or paddling.**

**% of boaters who say they always wear a lifejacket  
while fishing/ pleasure powerboating/ paddling  
% of boaters by type**



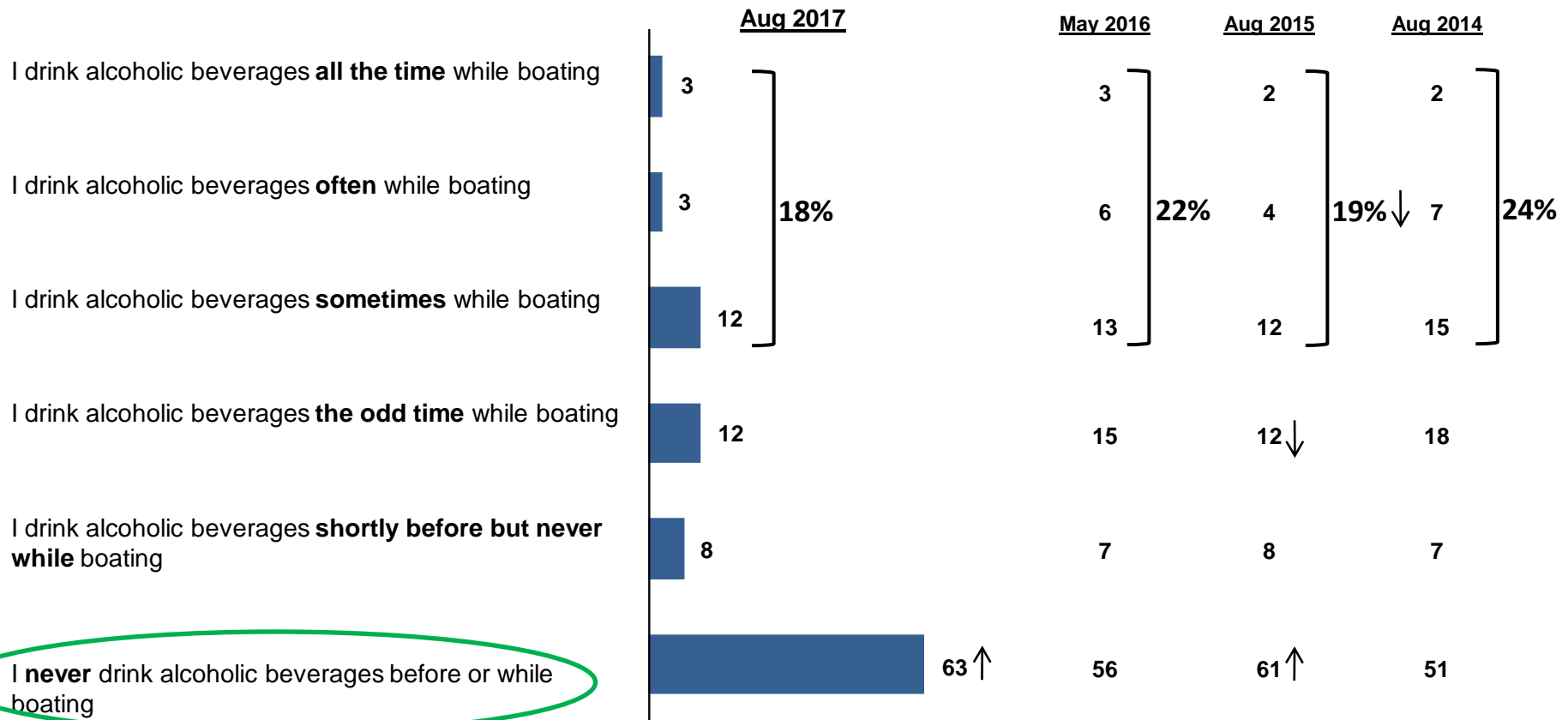


# Drinking and Boating



More boaters in August 2017 say they Never drink before or while boating compared to May 2016; similar proportion as in August 2015.

**How often boaters say they drink while boating\***  
**% of total boaters (n=469)**

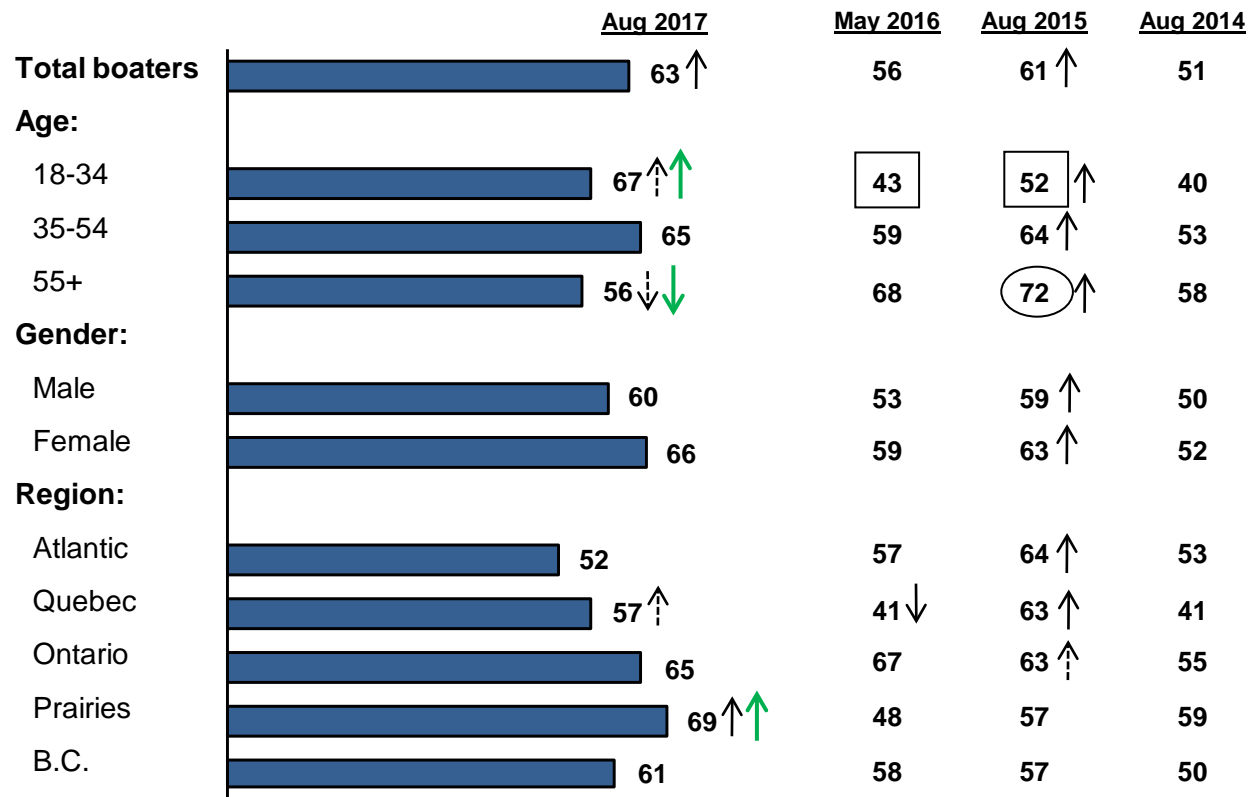




# More boaters in Prairies & Quebec saying they Never drink before or while boating in August 2017.

- Also more 18-34 yrs and fewer 55+ boaters saying they Never drink & boat.
- Boaters Not Born in Canada more likely to Never drink before or while boating (76%).

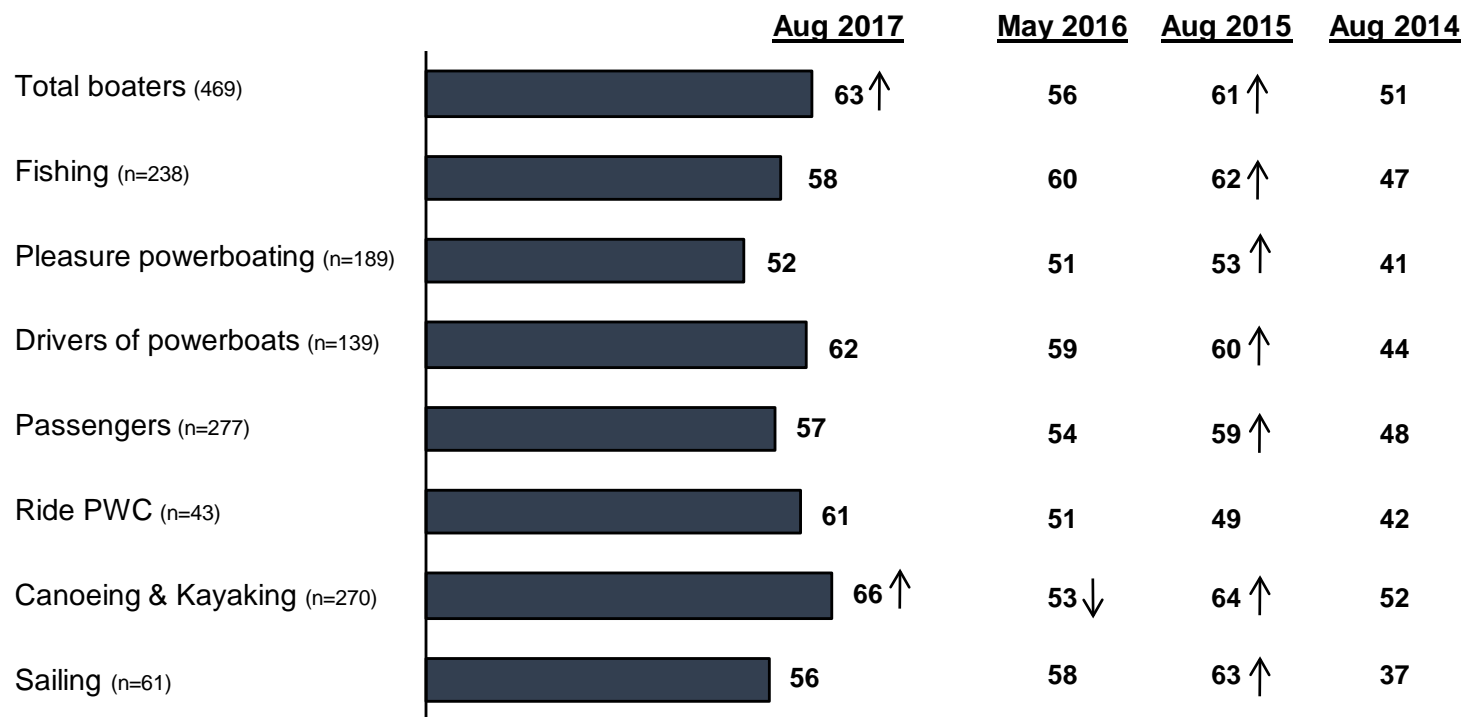
## % of boaters in each sub-group who say they “Never” drink alcoholic beverages before or while boating





## Proportion of Paddlers saying they **Never** drink before or while boating in August 2017 is up vs. May 2016 and back in-line with August 2015 level.

**% of boating activity participants who say they “Never” drink alcoholic beverages before or while boating\***

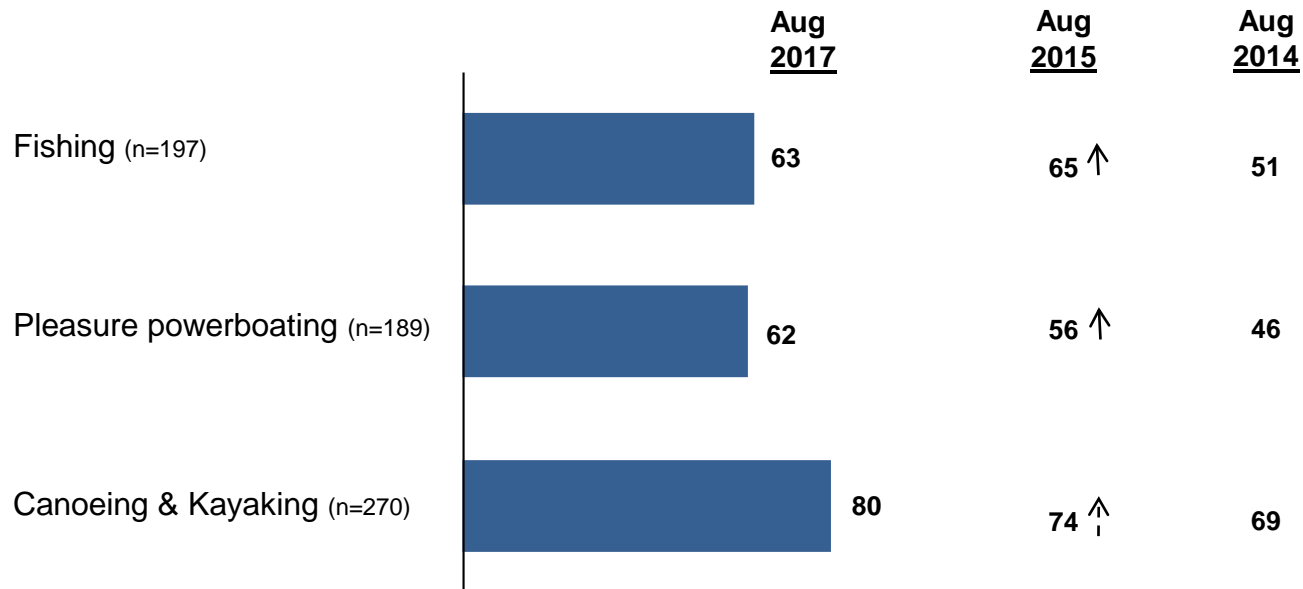




## **By activity, no change in the proportion of fishers, pleasure powerboaters and paddlers who say they Never drink while fishing/ boating/ paddling in Augfust 2017 vs. August 2015.**

- New Boaters are less likely to Never drink while Fishing (50%); boaters Not Born in Canada are more likely to Never drink while Fishing (78%).

### **By Activity - % of boaters who say they never drink while fishing/ pleasure powerboating/ paddling** **% of boaters by activity**





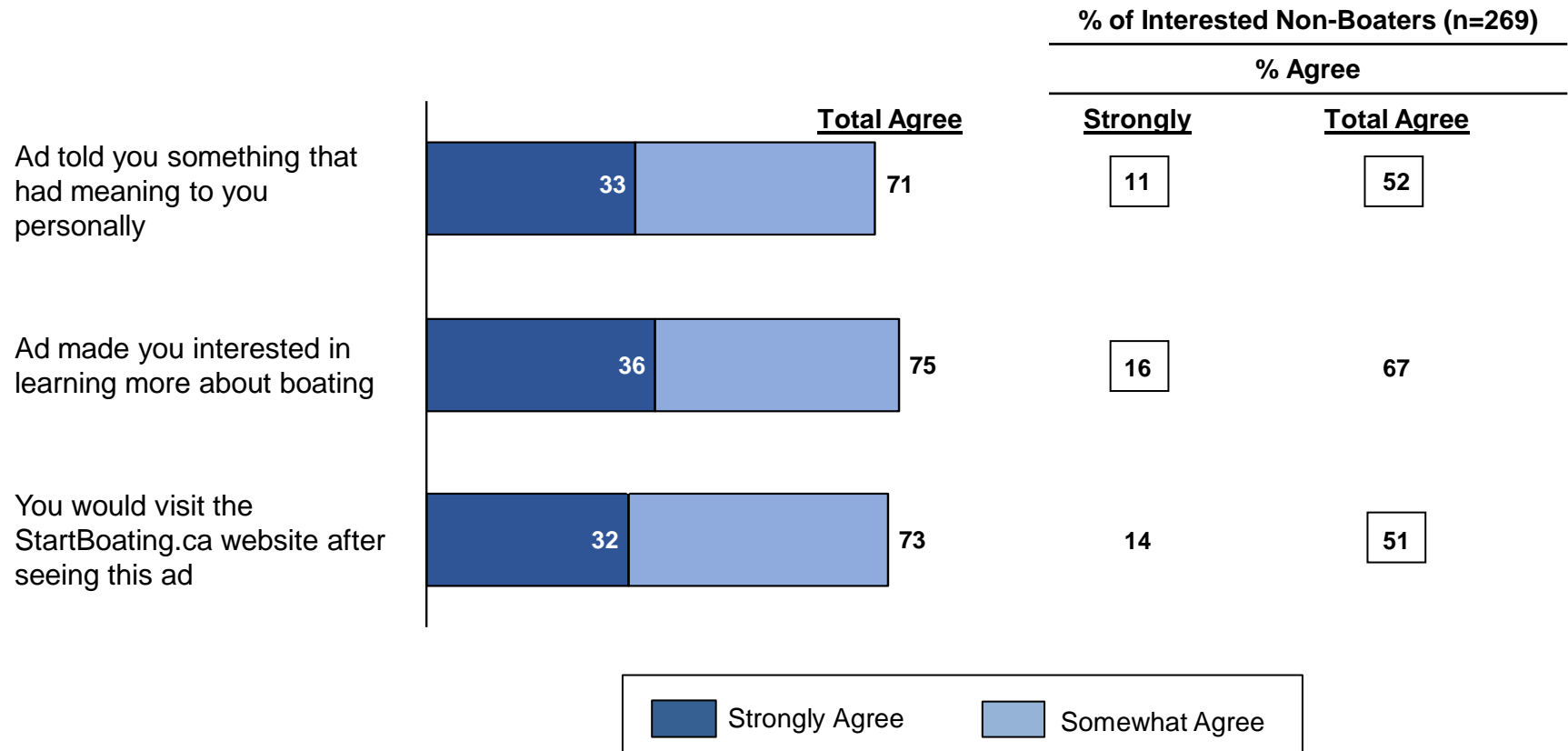
# 'Start Boating'



The StartBoating.ca outreach poster ad is quite effective in reaching New Boaters\* - it is relevant and interesting to them, and elicits strong interest in visiting the StartBoating.ca website.

- The StartBoating.ca poster ad is less effective with 'Interested Non-Boaters'.

### Reaction to StartBoating.ca Ad Poster - % of New Boaters (n=148)



\* New Boaters = Boaters who began boating within the last 2 years.





# Appendix



# Demographic Profile

	TOTAL INTERVIEWS							BOATERS						
	2012 (1017)	2013 (1221)	2014 (1005)	May 2015 (1004)	Aug 2015 (1502)	May 2016 (1000)	Aug 2017 (1000)	2012 (436)	2013 (454)	2014 (395)	May 2015 (459)	Aug 2015 (677)	May 2016 (417)	Aug 2017 (469)
<b>Language</b>														
English	80%	77%	79%	81%	80%	79%	80%	80%	79%	79%	84%	84%	81%	84%
French	20%	23%	21%	19%	20%	21%	20%	20%	21%	21%	16%	16%	19%	16%
<b>Gender</b>														
Male	48%	48%	48%	49%	49%	49%	49%	53%	49%	48%	56%	51%	53%	55%
Female	52%	52%	52%	51%	51%	51%	51%	47%	51%	52%	44%	49%	47%	45%
<b>Age</b>														
18-34	28%	28%	28%	28%	28%	28%	28%	34%	32%	33%	35%	39%	37%	32%
35-54	40%	37%	37%	37%	37%	37%	37%	39%	36%	39%	36%	39%	35%	36%
55+	32%	35%	35%	35%	35%	35%	35%	26%	32%	29%	29%	23%	28%	32%
<b>Region</b>														
Atlantic	7%	7%	7%	7%	7%	7%	7%	9%	8%	7%	8%	7%	7%	7%
Quebec	24%	24%	24%	24%	24%	24%	24%	21%	20%	23%	20%	24%	22%	20%
Ontario	38%	38%	38%	38%	38%	38%	38%	41%	39%	39%	36%	38%	38%	42%
Prairies	17%	17%	17%	18%	17%	18%	18%	15%	16%	17%	21%	18%	18%	16%
BC	13%	13%	13%	13%	13%	13%	13%	14%	17%	14%	16%	13%	16%	15%
Income - Mean	\$60.9M	\$63.3M	\$64.7M	\$61.0M	\$55.5M	\$64.4M	\$59.9M	\$62.5M	\$65.6M	\$70.4M	\$64.9M	\$63.6M	\$66.8M	\$66.7M
Born in Canada	n/a	n/a	n/a	n/a	n/a	n/a	87%	n/a	n/a	n/a	n/a	n/a	n/a	89%
Not Born in Canada	n/a	n/a	n/a	n/a	n/a	n/a	13%	n/a	n/a	n/a	n/a	n/a	n/a	11%

○ & □ = significantly different from previous wave at 95% confidence level



# Demographic Profile

	AUGUST 2017			
	<u>Total Interviews</u>	<u>Interested Non-boaters</u>	<u>Boaters</u>	<u>New Boaters</u>
	(1000)	(269)	(469)	(148)
<b>Language</b>				
English	80%	81%	84%	83%
French	20%	19%	16%	17%
<b>Gender</b>				
Male	49%	45%	55%	52%
Female	51%	55%	45%	48%
<b>Age</b>				
18-34	28%	32%	32%	44%
35-54	37%	39%	36%	38%
55+	35%	30%	32%	18%
<b>Region</b>				
Atlantic	7%	9%	7%	5%
Quebec	24%	25%	20%	25%
Ontario	38%	34%	42%	37%
Prairies	18%	19%	16%	12%
BC	13%	14%	15%	20%
Income - Mean	\$59.9M	\$53.6M	\$66.7M	\$57.4M
Born in Canada	87%	82%	89%	83%
Not Born in Canada	13%	18%	11%	17%

○ & □ = significantly different from Total at 95% confidence level



## Q8a: CSBC “Help us Catch Impaired Boaters” (English) and “One Drink can Change Everything” (French) ads / posters







## Q9: CSBC “Tired of Waiting” (English) and “Fatigué d’attendre” (French) ads / posters

# TIRED OF WAITING?

If you fell out of your boat, how long could you tread water?

As long as it takes for your ride to arrive?

**Buy the time you need.**

**WEAR YOUR LIFEJACKET.**



Canadian Sailing Council  
Conseil canadien de la voile

Transport Canada  
Transports Canada

Made possible with a financial contribution from Transport Canada.

[csbc.ca](http://csbc.ca)

# FATIGUÉ D'ATTENDRE?

Si vous tombiez de votre bateau, pendant combien de temps pourriez-vous tenir le coup?

Assez pour que quelqu'un vienne vous tirer d'affaire?

**Achetez-vous du temps.**

**PORTEZ VOTRE GILET DE SAUVETAGE.**



Canadian Sailing Council  
Conseil canadien de la voile

Transport Canada  
Transports Canada

Avec l'aide d'une contribution financière de Transport Canada

[csbc.ca](http://csbc.ca)



# Q10: Examples of CSBC safe boating daily newspaper, community newspaper and magazine articles

i-Say

Below are several examples of safe boating daily newspaper, community newspaper and magazine articles that you may or may not have seen during the past few months. The articles may not have looked exactly like these examples, but would have covered similar topics: "Drinking and boating don't mix"; "5 keys to safer boating"; "how to stay safe in cold water"; and "Wear your Lifejackets".

## Drinking and boating don't mix



By [Name] [Date]

Boating and drinking don't mix. It's a dangerous combination that can lead to accidents and injuries. The National Transportation Safety Board (NTSB) has reported that alcohol is a major factor in many boating accidents. In fact, the NTSB estimates that about 20 percent of all boating accidents involve alcohol. So, if you're going to be on the water, don't drink. It's the only way to stay safe.

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## "A pretty desperate situation": How to stay safe on dangerously cold water

By [Name] [Date]



Boating on cold water is a pretty desperate situation. It's a dangerous combination that can lead to accidents and injuries. The National Transportation Safety Board (NTSB) has reported that cold water is a major factor in many boating accidents. In fact, the NTSB estimates that about 20 percent of all boating accidents involve cold water. So, if you're going to be on the water, don't drink. It's the only way to stay safe.

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## Practice SAFE BOATING

It's important to keep in mind how to stay safe when boating. Here are some tips:

### Wear Your Lifejacket

Legally you must wear a Canadian approved PFD on board, appropriately sized for each passenger. But don't just carry it, wear it.

### Don't Drink and Boats

Boating under the influence is not just illegal, it's dangerous. Wait until you get home to have a drink.

### Take a Boating Course

The best way to ensure that anyone driving a motorboat should have a Pleasure Craft Operator Card. In fact, for your own safety and that of your passengers, we recommend you take a boating safety course.

### Be Prepared

Ensure your boat has all the required safety gear and sufficient fuel. Be sure the weather is suitable for your vessel's capabilities, and that you have a plan for what you'll do if you get into trouble.

### Weather Watch

For your safety, always check local weather conditions before departure. The radio, television and internet are good sources to get information. If you notice any bad weather conditions, such as changing clouds, dropping temperatures or rougher winds, pull out.

### Don't Drink and Boats

Boating under the influence is not just illegal, it's dangerous. Wait until you get home to have a drink.

### Take a Boating Course

The best way to ensure that anyone driving a motorboat should have a Pleasure Craft Operator Card. In fact, for your own safety and that of your passengers, we recommend you take a boating safety course.

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### Weather Watch

For your safety, always check local weather conditions before departure. The radio, television and internet are good sources to get information. If you notice any bad weather conditions, such as changing clouds, dropping temperatures or rougher winds, pull out.

## WEAR LIFEJACKETS



Wear your lifejacket. It's the only way to stay safe. The National Transportation Safety Board (NTSB) has reported that lifejackets are a major factor in many boating accidents. In fact, the NTSB estimates that about 20 percent of all boating accidents involve lifejackets. So, if you're going to be on the water, don't drink. It's the only way to stay safe.

Have you seen any newspaper or magazine articles like these examples before today? Please select one answer:

- ☐ Yes, I have definitely seen this before
- ☐ Yes, probably
- ☐ No, I have never seen this before

Previous

Next

Show Answer Summary





## Q11: CSBC “Start Boating” (English) and “Navigation 101” (French) ads / posters

### New to **BOATING?**

Learn how with

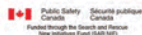
**START**boating.ca

**FREE**  
ONLINE LEARNING  
in 6 LANGUAGES

- KAYAK
- STAND UP PADDLE BOARD
- CANOE
- POWERBOAT



Learn more  
En savoir plus  
了解更多  
matuto nang higit pa  
और अधिक सीखें  
了解更多



### Nouveau venu à la **NAVIGATION DE PLAISANCE?**

Apprenez comment avec

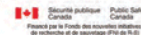
**NAVIGATION**101.ca

**GRATUIT**  
APPRENTISSAGE EN LIGNE  
en six LANGUES

- Kayak
- Planche à pagaie
- Canot
- Bateau à moteur



Learn more  
En savoir plus  
了解更多  
matuto nang higit pa  
और अधिक सीखें  
了解更多





# SBAW messages tracked were further updated for 2017 wave of tracking – 2 changes for August 2017 highlighted below. No changes for May 2016 vs. August 2015.

Aug 2017:	Aug 2015:	May 2015:	2014:	2013 & earlier:
Don't drink alcoholic beverages if you are operating a boat.	Don't drink alcoholic beverages if you are operating a boat.	Don't drink alcoholic beverages if you are operating a boat.	Don't drink alcoholic beverages if you are operating a boat.	Don't drink alcoholic beverages while boating... it's that simple. If you drink, don't drive.
Call 911 to report and help catch impaired boaters [EN] / One drink can change everything. Boat responsibly [FR]	Call 911 to report and help catch impaired boaters [EN] / One drink can change everything. Boat responsibly [FR]	More people are calling 911 to report and help catch impaired boaters. --	Call 911 to report and help catch impaired boaters.	
Impaired boating is impaired driving. The laws for impaired driving of an automobile also apply to impaired operation of a boat.	Impaired boating is impaired driving. The laws for impaired driving of an automobile also apply to impaired operation of a boat.		Leave the beer on the pier.	
Wear your lifejacket. <del>Don't just carry it on your boat.</del>	Wear your lifejacket. Don't just carry it on your boat.	Wear your lifejacket. Don't just carry it on your boat.	Wear your lifejacket. Don't just carry it on your boat.	Make the smart choice. Don't just carry your lifejacket aboard your boat. Wear it.
Everyone operating a motorized boat needs to get their "boating license" (i.e. "Pleasure Craft Operator Card").	Everyone operating a motorized boat needs to get their "boating license" (i.e. "Pleasure Craft Operator Card").	Everyone operating a motorized boat needs to get their "boating license" (i.e. "Pleasure Craft Operator Card").	Everyone operating a motorized boat needs to get their "boating license" (i.e. "Pleasure Craft Operator Card").	Everyone operating a motorized boat or water craft should get their Pleasure Craft Operator Card.
Check the weather before you go and while out boating. Anticipate changing or unsuitable weather and wave conditions.	Check the weather before you go and while out boating. Anticipate changing or unsuitable weather and wave conditions.	Check the weather before you go and while out boating. Anticipate changing or unsuitable weather and wave conditions.	Check the weather before you go and while out boating. Anticipate changing or unsuitable weather and wave conditions.	Watch the weather while out boating... keep a weather eye out.
Have the right safety equipment on board your boat to be prepared.	Have the right safety equipment on board your boat to be prepared.	Have the right safety equipment on board your boat to be prepared.	Have the right safety equipment on board your boat to be prepared. --	Have the right safety equipment on board your boat... have a flare for rescue.
If you fall into cold water and are already wearing your lifejacket, you'll have a better chance to survive.	If you fall into cold water and are already wearing your lifejacket, you'll have a better chance to survive.	If you fall into cold water and are already wearing your lifejacket, you'll have a better chance to survive.	If you fall into cold water and are already wearing your lifejacket, you'll have a better chance to survive.	If you wear your lifejacket before falling into cold water you'll float and have a chance to survive.
Your first reaction when you fall unexpectedly into cold water is a deep gasp. Wearing a lifejacket keeps your head above water to avoid inhaling water and drowning.	Your first reaction when you fall unexpectedly into cold water is a deep gasp. Wearing a lifejacket keeps your head above water to avoid inhaling water and drowning.	Your first reaction when you fall unexpectedly into cold water is a deep gasp. Wearing a lifejacket keeps your head above water to avoid inhaling water and drowning.	--	Be prepared for the possibility of falling into cold water by wearing your lifejacket.
Take a boating course to become a more knowledgeable boater.	Take a boating course to become a more knowledgeable boater.	Take a boating course to become a more knowledgeable boater.	Take a boating course to become a more knowledgeable boater.	The more knowledge you have, the more enjoyable boating becomes.
If you're hooked on fishing, <del>maybe it's time to get your kids hooked on wearing lifejackets too!</del>	If you're hooked on fishing, maybe it's time to get hooked on wearing your lifejacket too.			
--	If you fish, it is great to get your kids hooked on fishing. Get them wearing their lifejackets so they're hooked on lifejackets too.			





# Safe boating attitudes / behaviours tracked were updated for August 2015 wave of tracking. No further changes for May 2016 or August 2017.

Aug 2017:	Aug 2015:	May 2015:	2014:	2013 & earlier:
<b>Drinking &amp; boating:</b> I am not going to drink any alcoholic beverages while operating a boat. I am not going to operate a boat after I have consumed alcoholic beverages. I am going to call 9-1-1 to report an impaired boater if I see one.	<b>Drinking &amp; boating:</b> I am not going to drink any alcoholic beverages while operating a boat <del>this season</del> . I am not going to operate a boat after I have consumed alcoholic beverages <del>this season</del> . I am going to call 9-1-1 to report an impaired boater if I see one.	<b>Drinking &amp; boating:</b> I am not going to drink any alcoholic beverages while operating a boat this season. I am not going to operate a boat after I have consumed alcoholic beverages this season. I am going to call 9-1-1 to report an impaired boater if I see one.	<b>Drinking &amp; boating:</b> Same I think there should be more law enforcement spot checks out on the water to check for "drinking & driving" boaters.	I am not going to drink any alcoholic beverages while out on the water in a boat this season. Same
<b>Wearing your Lifejacket:</b> I will wear my lifejacket all the time when I'm out on the water in a boat. I am going to strongly encourage everyone else who is out in a boat with me to wear their lifejacket. - -	<b>Wearing your Lifejacket:</b> I will wear my lifejacket all the time when I'm out on the water in a boat <del>this season</del> . I am going to strongly encourage everyone else who is out in a boat with me <del>this season</del> to wear their lifejacket. I'm going to wear an inflatable lifejacket when I'm out on the water in a boat <del>this season</del> .	<b>Wearing your Lifejacket:</b> I will wear my lifejacket all the time when I'm out on the water in a boat this season. I am going to strongly encourage everyone else who is out in a boat with me this season to wear their lifejacket. I'm going to wear an inflatable lifejacket when I'm out on the water in a boat this season.	<b>Wearing your Lifejacket:</b> Same. Same. Same.	Same Same Same
<b>Preparedness:</b> I will always check my boat over every time before I go out on the water; including making sure I have enough lifejackets on board I'm going to mentally run through a pre-departure checklist, every time I go out on the water.	<b>Preparedness:</b> I will always check my boat over every time before I go out on the water <del>this season</del> ; including making sure I have enough lifejackets on board I'm going to mentally run through a pre-departure checklist, every time I go out on the water <del>this season</del> .	<b>Preparedness:</b> I will always check my boat over every time before I go out on the water this season; including making sure I have enough lifejackets on board I'm going to mentally run through a pre-departure checklist, every time I go out on the water this season.	<b>Preparedness:</b> Same. Same.	Same I'm going to review my pre-departure checklist, every time I go out on the water this season.
<b>Cold water:</b> I'm going to make a point of being better prepared for the possibility of falling into cold water, by wearing my lifejacket	<b>Cold water:</b> I'm going to make a point of being better prepared for the possibility of falling into cold water <del>this season</del> , by wearing my lifejacket	<b>Cold water:</b> I'm going to make a point of being better prepared for the possibility of falling into cold water this season, by wearing my lifejacket --	<b>Cold water:</b> Same I don't worry about the temperature of the water, as I don't boat during what I consider to be the cold water season.	Same Same
<b>Boating education:</b> I already have my "boating license" (ie. Pleasure Craft Operator Card). I don't have my "boating license" (Pleasure Craft Operator Card) yet, but I'm going to get it. I have already taken a boating course or training beyond the "boating license" (PCOC) level. I'm going to make a point of getting more information, or taking a boating course to become a more knowledgeable boater.	<b>Boating education:</b> I already have my "boating license" (ie. Pleasure Craft Operator Card). I don't have my "boating license" (Pleasure Craft Operator Card) yet, but I'm going to get it <del>this year</del> . I have already taken a boating course or training beyond the "boating license" (PCOC) level. I'm going to make a point of getting more information, or taking a boating course to become a more knowledgeable boater.	<b>Boating education:</b> I already have my "boating license" (ie. Pleasure Craft Operator Card). I don't have my "boating license" (Pleasure Craft Operator Card) yet, but I'm going to get it this year. I have already taken a boating course or training beyond the "boating license" (PCOC) level. I'm going to make a point of getting more information, or taking a boating course to become a more knowledgeable boater.	<b>Boating education:</b> Same. Same. Same. Same.	I already have my Pleasure Craft Operator Card. I don't have my Pleasure Craft Operator Card yet, but I'm going to get it this year. I have already taken boating safety education or training beyond the Pleasure Craft Operator Card level I'm going to make a point of getting more information, or taking a course, to learn more about how to boat safely.

7. Please indicate how much you agree or disagree that each of these statements applies to you, ie. describes things you are doing or intend to do this year (on a scale from 1[Strongly disagree] to 10[Strongly agree])