



U.S. Superyacht ASSOCIATION

OCTOBER 2022

PRESENTER: BERT FOWLES, VICE CHAIRMAN | U.S. SUPERYACHT ASSOCIATION



WELCOME TO THE
63RD FORT LAUDERDALE
INTERNATIONAL BOAT SHOW

WHY ARE WE HERE?



63RD FLIBS

MARINE INDUSTRY

MIASF DATA

28% HIGHER WAGES
THAN STATE AVERAGE

BOATS REGISTERED BY STATE TOP 3:
FLORIDA 987K, MINNESOTA 830K AND
MICHIGAN 808K

REGIONAL ECONOMIC IMPACT
\$11.5B AND 136,000 JOBS
BROWARD, DADE, AND PALM BEACH

FL CITRUS INDUSTRY
ECONOMIC IMPACT \$6.7B EMPLOYING 33,000

CRUISE INDUSTRY
GLOBAL ECONOMIC IMPACT
\$150B AND 1.17 MILLION JOBS

\$1.79B

ECONOMIC IMPACT

2022 FLIBS ANNUAL

100,000+ ATTENDEES

6 MILES OF DOCKS = 15 MINUTES TO WALK ONE MILE AT AN AVG PACE

\$571M

ECONOMIC IMPACT

2020 TAMPA SUPERBOWL

24,000 ATTENDEES | MOVES AROUND EVERY YEAR

\$350M

ECONOMIC IMPACT

MAY 2022 F1 MIAMI GRAND PRIX

243,000 ATTENDEES



BOAT SHOW ATTENDANCE YEAR OVER YEAR

OVER 80' / 24M

* NAMED YACHTS ONLY

* 2020 LEFT OUT

	2019	2020	2021	2022
Miami Yacht Show	44		X	20
Palm Beach International Boat Show	87		54	71
MYBA Charter Show	60		X	18
Cannes Yachting Festival	31		24	50
Monaco Yacht Show	66		84	109
Fort Lauderdale Intl Boat Show	113		68	~79

ALL OF 2019 (401 SUPERYACHTS) REPRESENTS **7%** OF THE TOTAL ACTIVE AIS SUPERYACHT MARKET
ALL OF 2022 (347 SUPERYACHTS) REPRESENTS **6%** OF THE TOTAL ACTIVE AIS SUPERYACHT MARKET

☺ BUILDING OTHER WAYS TO REACH THE MARKET | INTIMATE DESTINATION EXPERIENCES ☺



COST PER LEAD (CPL) BY INDUSTRY

COST PER LEAD (CPL) IS DEFINED AS
THE GROSS MARKETING COST
EXPENDED TO ACQUIRE A LEAD FOR
YOUR BUSINESS

A **LEAD** IS DEFINED AS A DIRECT
CONNECTION VIA E-MAIL, PHONE OR
IN-PERSON INTRODUCTION TO A
PROSPECTIVE CUSTOMER INTERESTED
IN PURCHASING A PRODUCT OR
SERVICE.

**INCURRED REGARDLESS OF OUTCOME
AND
NOT CUSTOMER ACQUISITION COSTS
(CAC)**

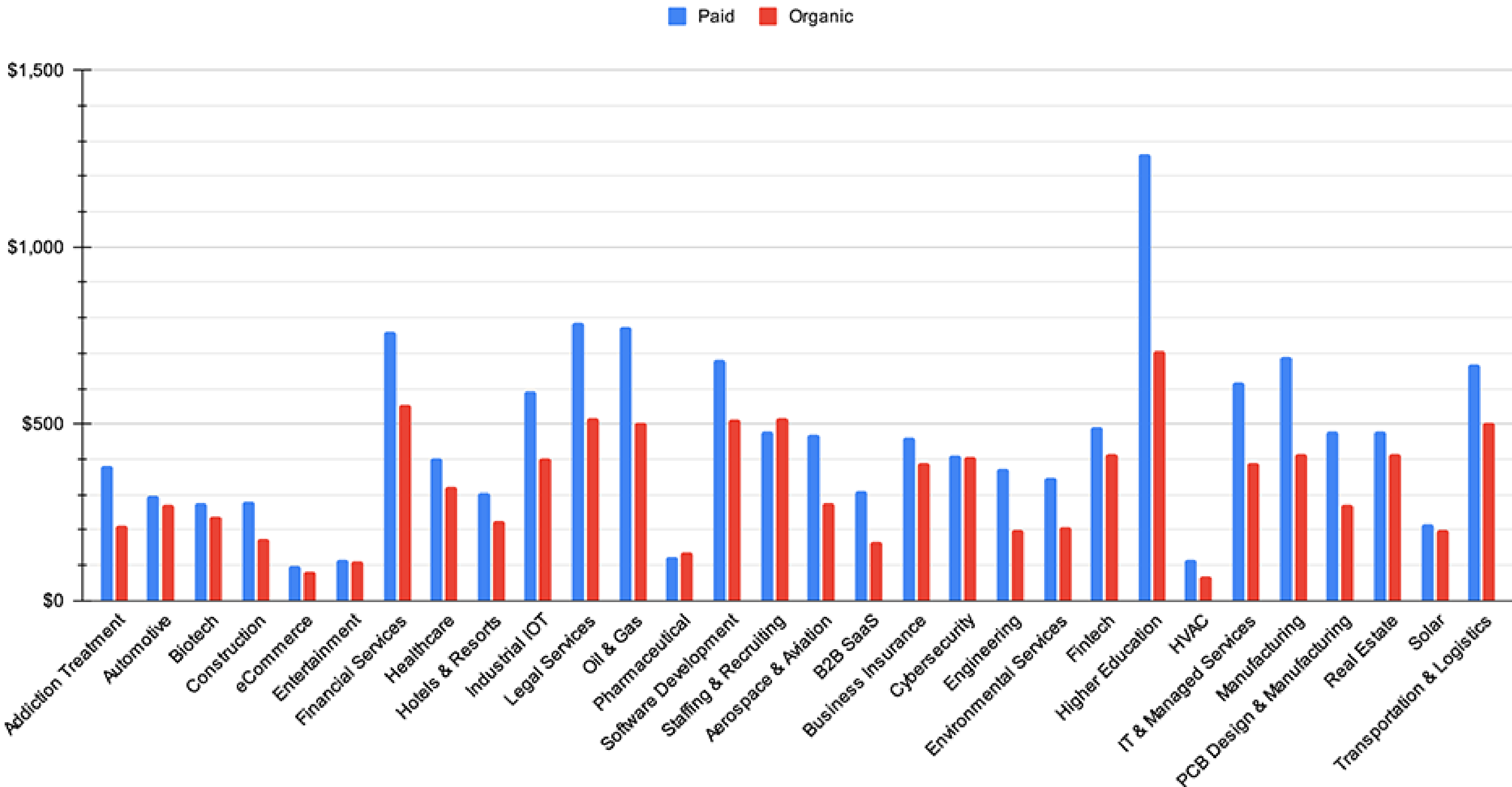
CREDIT SOURCE:
FIRST PAGE SAGE – 2022 DATA SET

~\$500 CPL

HOW MUCH DOES IT COST TO GENERATE A SALES LEAD AT FLIBS?

HOTEL/RESORT AND TRANSPORTATION AVERAGE

Average Cost Per Lead by Industry



~ 2022 FLIBS 40 (OVER 80'/24M) X 500 CPL = \$20,000



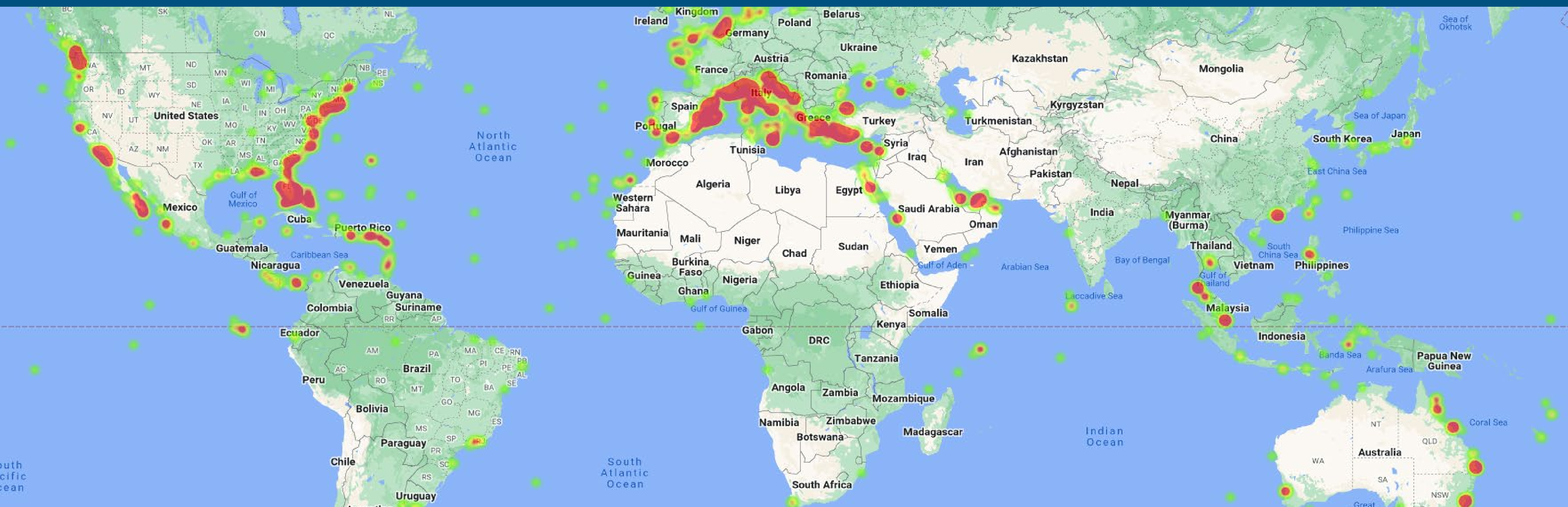
OUR CUSTOMERS

DATA VIEWPOINTS:

MIGRATION
OPERATION
ECONOMICS

SUPERYACHT (OVER 80') TRAFFIC SNAPSHOT

OCTOBER 2022



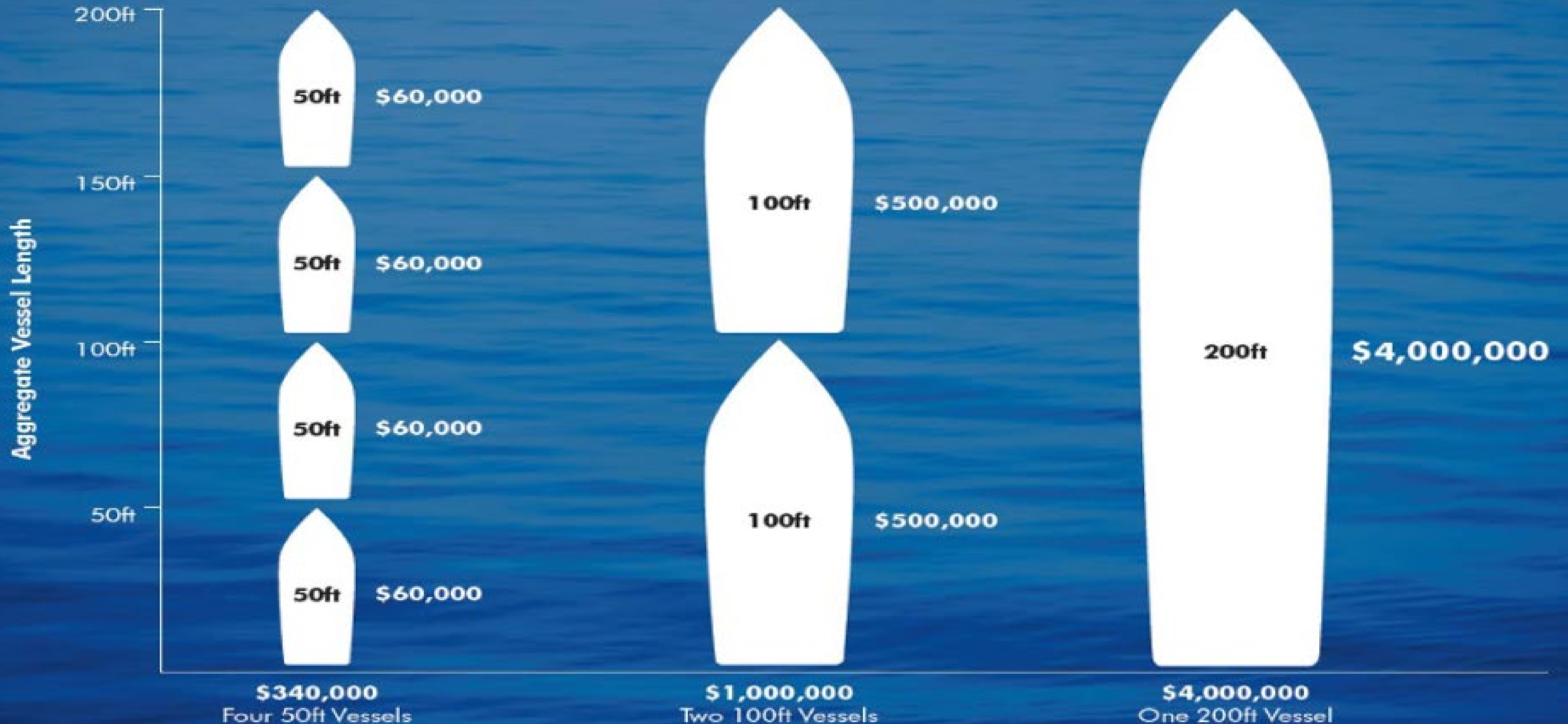
6,000+

VESSELS ACTIVELY TRACKING ON AIS OVER 80'

AIS - AUTOMATIC IDENTIFICATION SYSTEM / *12,000 IN ENTIRE DATABASE

ANNUAL ECONOMIC IMPACT OF VESSEL SIZES

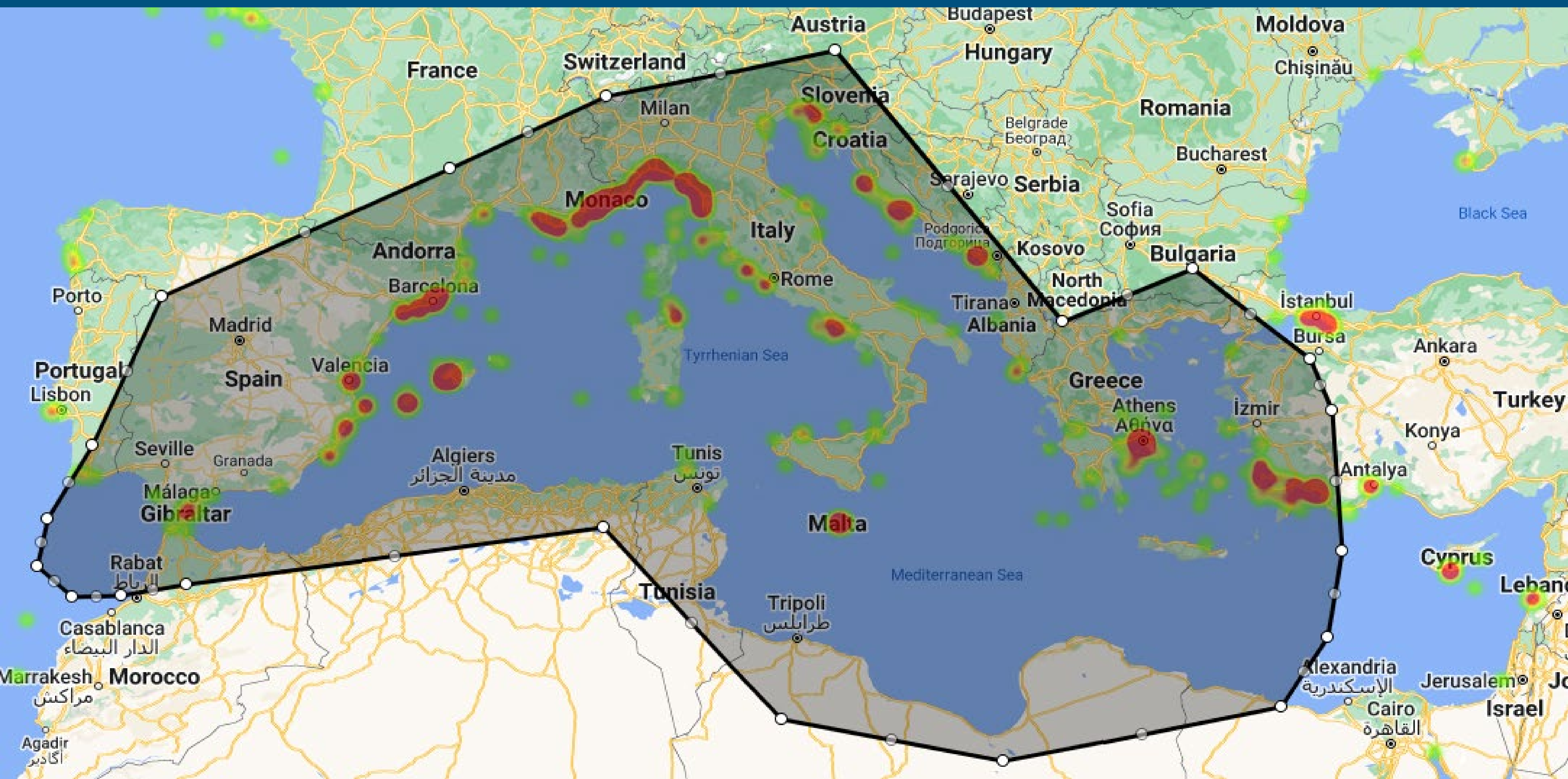
BASED ON OPERATING EXPENSES BEING EQUAL TO 10% OF THE VESSEL VALUE



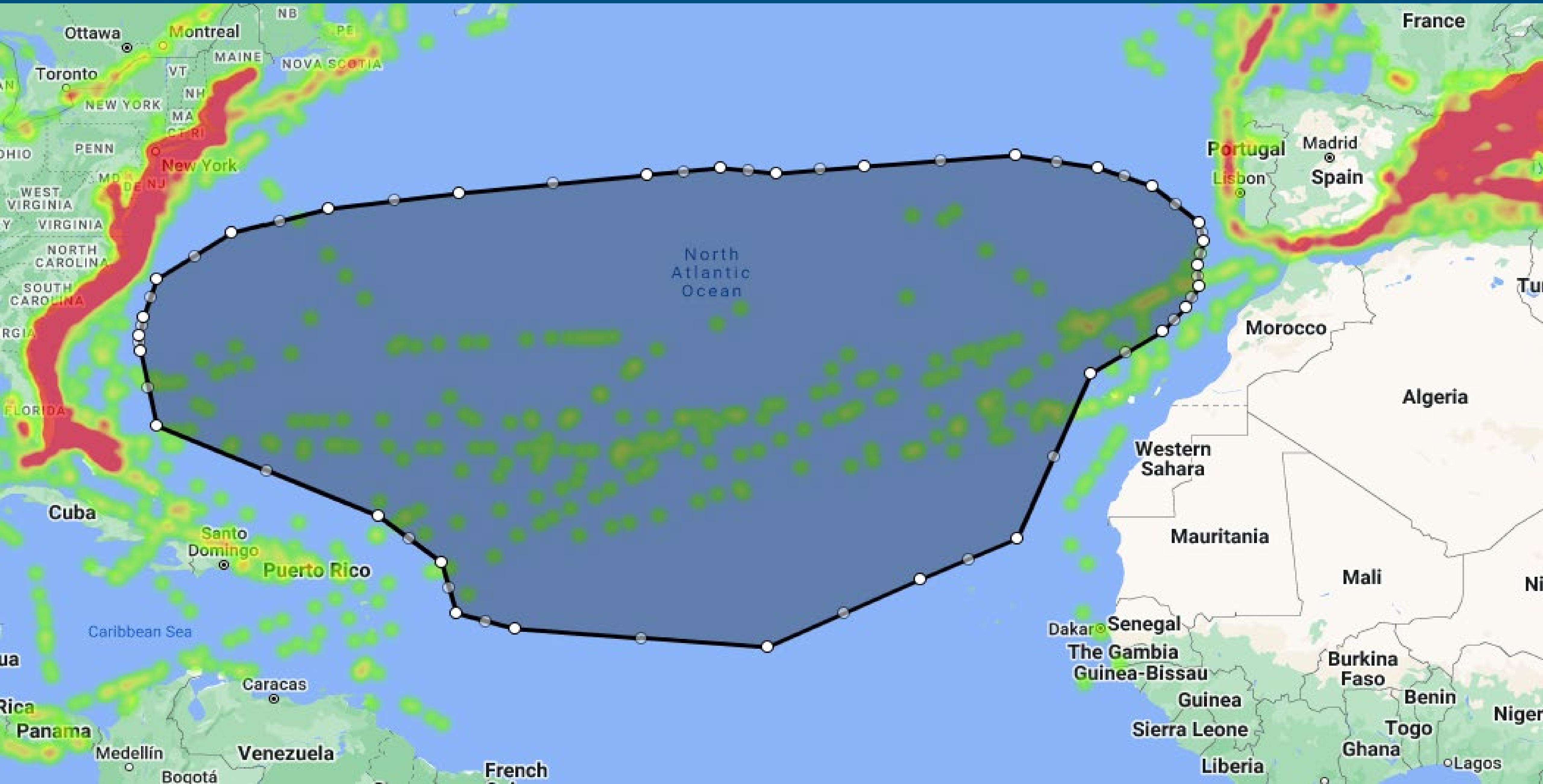
Regulatory, Insurance, Crew, Provisioning, Dockage, Maintenance, Fuel, Communications

*Based on operating expenses being equal to 10 percent of the vessel value.

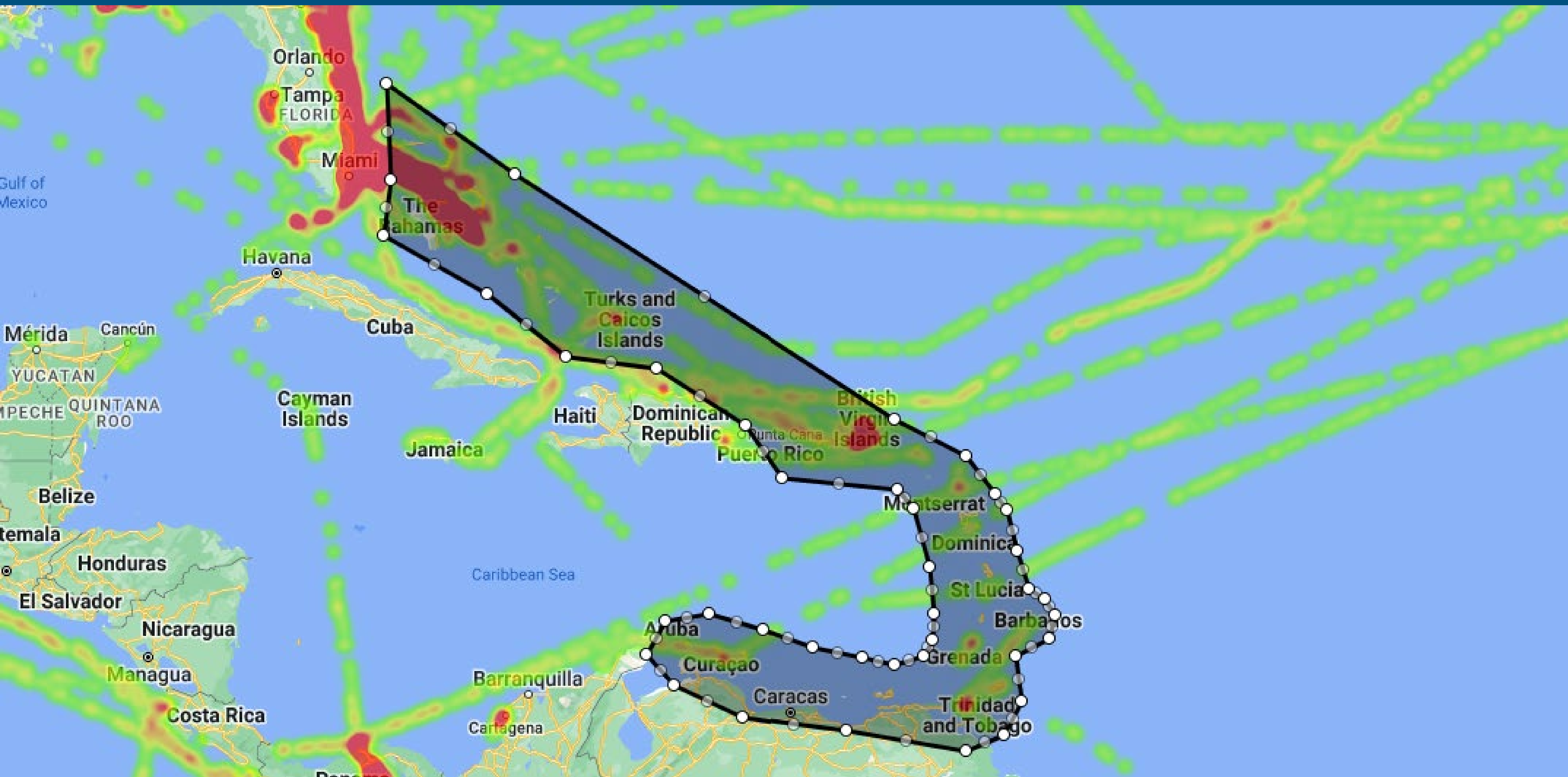
MEDITERRANEAN DATA SET



NORTH ATLANTIC DATA SET



CARIBBEAN DATA SET





DATA SET ACTIVE AIS SUPERYACHT OCCUPANCY

MOVEMENT = USE
AND AN ELEVATED
CUSTOMER SERVICE
RELATIONSHIP (CRM)

2022

September

August

July

June

May

April

March

February

January

Mediterranean

Trans Atlantic

Caribbean

2,848

24

176

2,902

34

241

2,874

42

302

2,814

71

359

2,702

175

482

2,547

128

644

2,468

75

695

2,460

55

598

2,480

35

633

2021

December

November

October

September

August

July

June

May

April

March

February

January

Mediterranean

Trans Atlantic

Caribbean

2,562

142

590

2,674

126

345

2,136

50

180

2,844

35

158

2,834

21

227

2,764

41

283

2,605

87

373

2,422

99

414

2,300

73

537

2,172

47

544

2,128

25

492

2,115

27

576

SOUTHERN FRENCH COASTLINE AROUND SAINT TROPEZ 2019 – 2022

MOVEMENT = ENHANCED CUSTOMER SERVICE RELATIONSHIP (CRM)

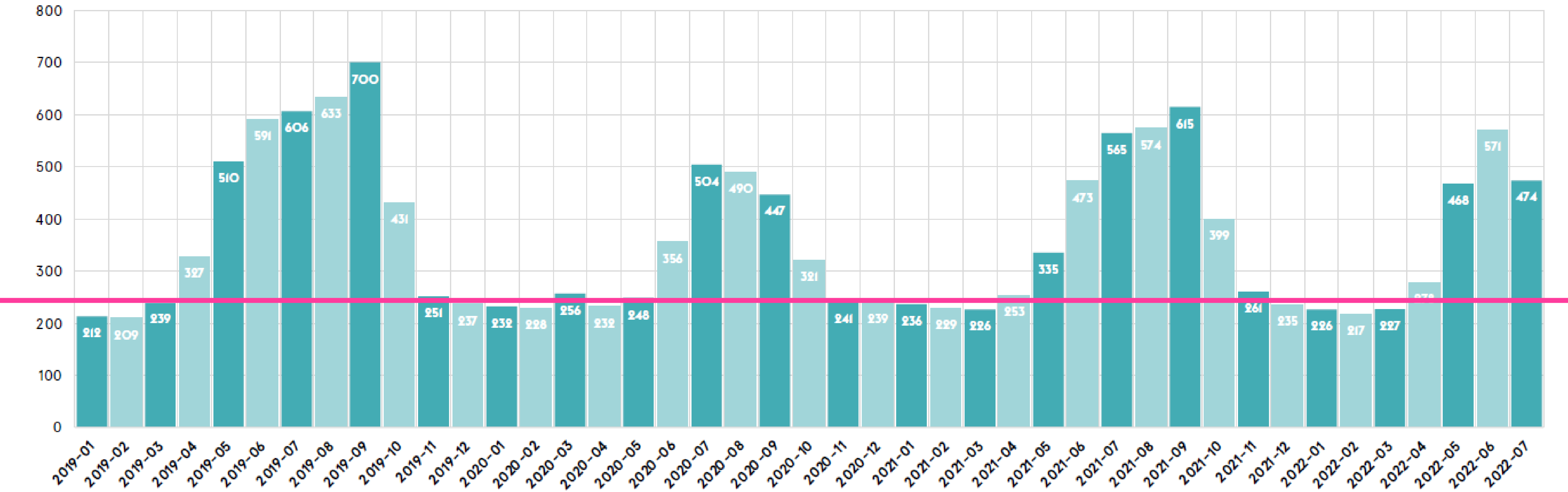


SOUTHERN FRENCH COASTLINE AROUND SAINT TROPEZ 2019 – 2022

MOVEMENT = USE | ENHANCED CUSTOMER SERVICE RELATIONSHIP (CRM)
FUEL, PROVISIONING, REFIT, AGENT SERVICES, CHARTER, AND MORE

ANALYSIS OF YACHT ACTIVITY 2019 – 2022

Number of yachts in area Jan 2019 - July 2022



SOUTHERN FRENCH COASTLINE AROUND SAINT TROPEZ 2019 – 2022

MOVEMENT = USE ELEVATED CUSTOMER SERVICE RELATIONSHIP (CRM)

ANALYSIS OF YACHT ACTIVITY 2019 – 2022

14

Numbers
of marinas

12.7 days

average length
of stay
in marinas

47.48m

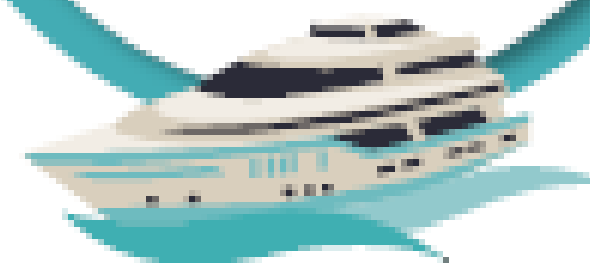
average LOA
of yachts
in area

727

average GT
of yachts
in area

9.05m

average beam
of yachts
in area





ESTIMATED SUPERYACHT CREW

ESTIMATED CREW MARKET SIZE (FOR THE END OF THE YEAR)

Average Crew numbers / Global Fleet

	NO. YACHTS	LOW	HIGH	LOW	HIGH
24-30	6,076	2	5	12,152	30,380
30-40	3,567	4	7	14,268	24,969
40-50	1,228	6	10	7,368	12,280
50-60	379	8	14	3,032	5,306
60-70	199	12	18	2,388	3,582
70-80	105	20	30	2,100	3,150
80-90	61	25	35	1,525	2,135
90-100	36	35	50	1,260	1,800
100+	55	50	70	2,750	3,850
TOTAL	11,760			46,843	87,452

SOURCE: BOAT INTERNATIONAL AND
MERIDIANGO.COM



33,000

ESTIMATED GLOBAL
SUPERYACHT CREW
ON ACTIVE AIS
VESSELS

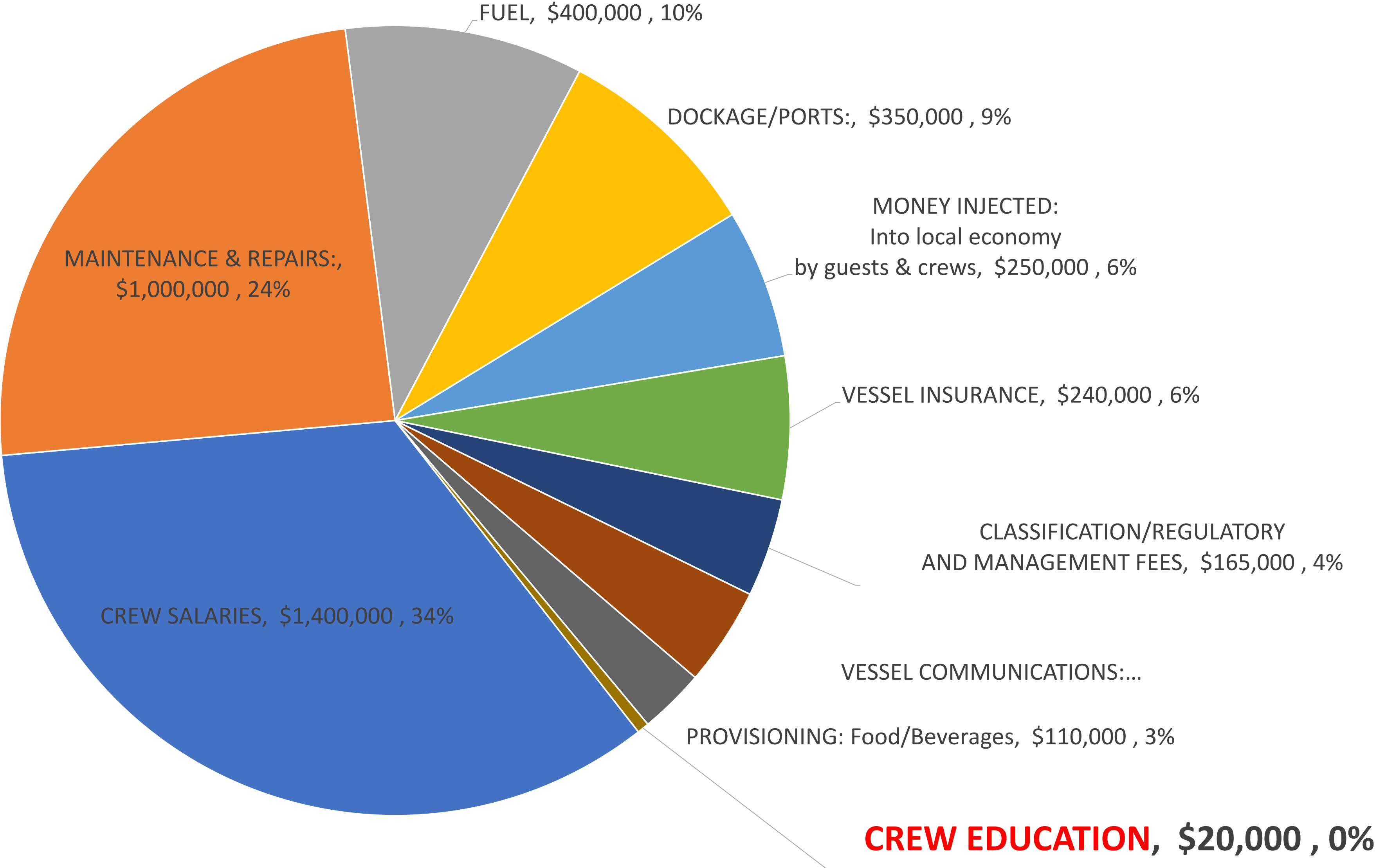
10% OF MARKET 3,300 CREW
(10% / 33,000)

10% OF MARKET 600 CAPTAINS
(10% / 6,000)



ESTIMATED SUPERYACHT ANNUAL EXPENSES 180' / 54M

\$4,000,000





OUR CUSTOMER RELATIONSHIPS

HOW EASY IS THE SUPERYACHT INDUSTRY FOR OUR CUSTOMERS?

*WE HAVE GOOD PEOPLE, PRETTY BEACHES, WONDERFUL CULTURE, SOLID
INFRASTRUCTURE AND STRONG RELATIONSHIPS*

*WHAT ABOUT DATA, STANDARDS, AND GUARANTEES
FOR THE SUPERYACHT INDUSTRY ?*

SUPERYACHT ANNUAL EXPENSES

180' (55M) SUPERYACHT: \$4.075 MILLION





SUPERYACHT ANNUAL CALENDAR

* ESTIMATED
OWNER USE
30 DAYS / 8%
HOW WE ARE JUDGED
QUALITATIVELY

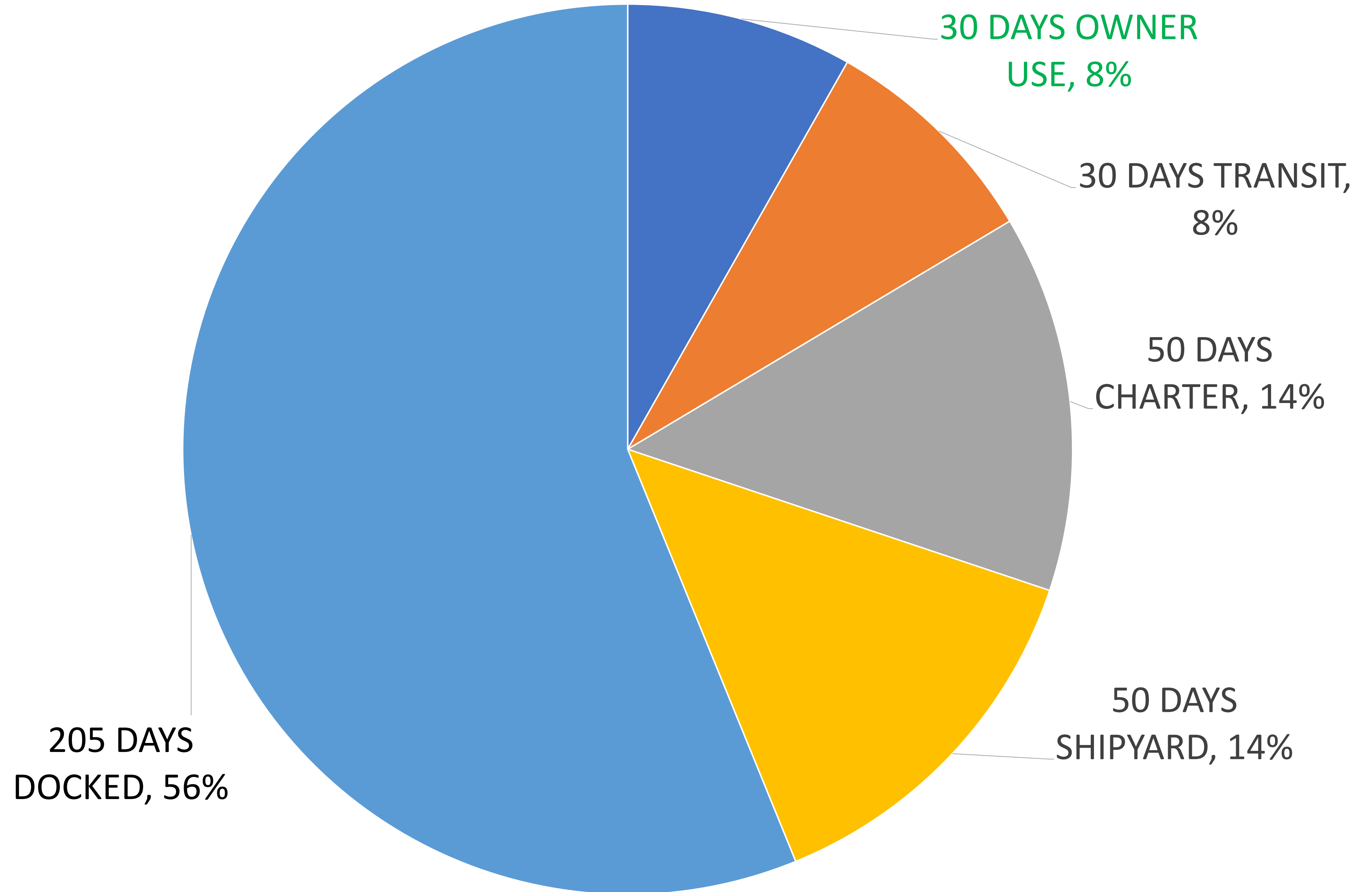
HOW WE ARE JUDGED QUANTITIVELY

TRANSIT
30 DAYS / 8%

SHIPYARD
50 DAYS / 14%

CHARTER
50 DAYS / 14%

DOCKED
205 DAYS / 56%





**VALUED
ADDED TAX
(VAT) RATE
ON CHARTER
BY
DESTINATION**

CROATIA	FRANCE & MONACO	ITALY	SPAIN	BAHAMAS	COSTA RICA
13%	20%	22%	21%	*14%	2.5%

200,000 CHARTER @ 13% = 26,000

200,000 CHARTER @ 20% = 40,000

200,000 CHARTER @ 22% = 44,000

200,000 CHARTER @ 21% = 42,000

200,000 CHARTER @ 14% = 28,000

200,000 CHARTER @ 2.5% = 5,000



CUSTOMER SERVICE INSIGHTS

62%

OF PEOPLE SAID THEY WOULD STOP BUYING FROM A COMPANY AFTER HAVING A BAD CUSTOMER SUPPORT EXPERIENCE.

80%

OF RESPONDENTS WERE MORE LIKELY TO BE LOYAL TO A BRAND IF THEIR EXPERIENCE WAS POSITIVE.

3 TIMES

SURVEY POLLED 2,000 AMERICANS, ALSO REVEALED THAT CUSTOMERS SPEND 42 MINUTES ON HOLD EACH TIME THEY CONTACT CUSTOMER SERVICE, WHICH THEY DO ON AVERAGE THREE TIMES PER ISSUE.

Americans would rather

30%

Do their taxes



28%

Go to the dentist



25%

Go to the DMV



24%

Shave their head



22%

Spend a night in jail



instead of contacting customer service



WHAT IS 5 STAR SERVICE FROM A DATA PERSPECTIVE?

WHAT QUANTITATIVE DATA ESTABLISHES
SERVICE STANDARDS FOR THE SUPERYACHT
INDUSTRY?

HOW MANY TOYS CAN WE PLACE
ON THE YACHT? IS THAT THE SUPERYACHT
INDUSTRY APPROACH TO QUANTITATIVE
CUSTOMER SERVICE?

RITZ CARLTON: 3 YACHTS, 149 SUITES EACH
AND UP 289 GUESTS

FOUR SEASONS: 2025 / 679' 95 SUITES

BOTH BRING AN ESTABLISHED RATED
SERVICE STANDARD REPUTATION
TO THE YACHTING SECTOR



INDUSTRY FIVE-STAR EFFICIENCY STANDARDS

3 MINUTES FOR DRINKS TO BE SERVED

10 MINUTES FOR REQUESTS UNLESS OTHERWISE ADVISED

HOT FOODS IN **15 MINUTES** / COLD FOOD 10 MINUTES



WHAT DATA DRIVEN
PLATFORMS ARE
COMPANIES
INVESTING TO GET
MORE BUSINESS?

DATA DECISION
DRIVEN TECHNOLOGY

PLANNED MARTECH INVESTMENTS IN NEXT 12 MONTHS:



TAKEAWAYS

1. ESTABLISHING SUPERYACHT INDUSTRY QUANTITATIVE STANDARDS
TO MAKE YACHTING EASIER AND MORE FUN

WHERE ARE THE SUPERYACHT INDUSTRY GUARANTEES?

2. INVESTING IN DATA DRIVEN TECHNOLOGY TO GET MORE CUSTOMERS

WHAT SUPERYACHT PLATFORMS AND DATA DEFINE EXCEPTIONAL INDUSTRY SERVICE?

SUPERYACHT MOVEMENT = BUSINESS

3. "WHAT GETS MEASURED GETS IMPROVED"

PETER DRUCKER

WHERE IS THE SUPERYACHT INDUSTRY'S CUSTOMER FEEDBACK AND DATA ANALYSIS?

