



Transport for NSW

Recreational Boating Participation Executive Summary



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1. Introduction

The Centre for Maritime Safety engaged Ipsos Market Research to determine the current participation level of recreation boating within New South Wales waterways.

The research was undertaken to assist in better understanding the demographic and behavioural profile of boaters across NSW.

2. Need for research

Recreational boating is an extremely popular pastime within New South Wales.

In June 2017 there were over 236,000 registered recreational vessels in NSW.

However smaller vessels, such as dinghies, kayaks and stand up paddle boards are not required to be registered making it difficult to understand the number of craft within the State.

In addition, no solid data exists for the number of boating participants utilising NSW waterways.

A greater understanding of participation numbers and boating behaviour is needed to help better inform priorities for future safety priorities and recreational boating infrastructure.

The findings will also provide context around boating incident statistics and assist in identifying trends within the industry.

2.1 Research objectives

The specific research objectives included –

- Establish the participation rate of recreational boating in NSW waterways, including both registered and non-registered vessels
- Develop an understanding of the demographic and behavioural profile of boaters accessing NSW waterways, in both registered and non-registered vessels
- Establish an industry benchmark which can be repeated as appropriate in NSW and used as a guide for other States and Territories
- Provide an evidence-base that will inform -
 - Future investment in products, services and infrastructure
 - Boating policy and strategy

2.2 Research design

The research comprised two distinct practical phases –

Boating Participation Survey

The Boating Participation Survey was conducted through random telephone sampling utilising both mobile and landline phones.

The sample frame for the survey included NSW residents and residents of areas along the Victorian and Queensland borders with NSW.

The participation survey assisted in determining the incidence of recreational boat and watercraft usage on NSW waterways during the summer of December 2017 to February 2018.

Boating Behaviour Survey

The Boating Behaviour Survey was conducted online with members of boating clubs and organisations.

This data was used to weight the Boating Behaviour Survey to ensure the findings reflect the population of boaters in NSW waters.

The Boating Behaviour Survey provides a greater understanding of specific behaviours including –

- Vessel ownership and storage
- Safety practices and knowledge
- Behaviours on the most recent boating trip
- Satisfaction with waterway infrastructure and environmental management.

3. Key research findings

3.1 Participation

The rate of recreational boating participation in NSW waters is 16 percent of the population.

The rate of participation is slightly higher in regional NSW and the ACT (19 percent) while the Victorian border area has the highest rate at 23 percent.

Only four percent of people within the Queensland border area are boating in NSW waters.

The participation rate is highest in relation to large power boats (six percent) and small boats (five percent) while a further five percent used a form of paddlecraft.

Over 18 percent of NSW households own a recreational vessel, with paddlecraft being the most popular form of craft at nine percent ownership followed by large powerboats (four percent) and small powerboats (four percent).

Households in the northern NSW maritime region are more likely to own a recreational vessel (27 percent) than those in the southern NSW maritime region (22 percent) or Sydney (12 percent).

Seven percent of NSW residents hold a NSW recreational boat licence while eight percent of Victorian residents living within the border area hold a NSW licence.

Only one percent of residents within the Queensland border area hold a NSW boating licence.

3.2 Boat ownership, storage and safety equipment

The specific research objectives included -

- Establish the participation rate of recreational boating in NSW waterways, including both registered and non-registered vessels
- Develop an understanding of the demographic and behavioural profile of boaters accessing NSW waterways, in both registered and non-registered vessels
- Establish an industry benchmark which can be repeated as appropriate in NSW and used as a guide for other States and Territories
- Provide an evidence-base that will inform -
 - Future investment in products, services and infrastructure
 - Boating policy and strategy
 - Behavioural change and customer engagement campaigns.

3.2.1 Ownership

Nearly all (94 percent) people who use NSW waterways own their own vessel with paddlecraft (42 percent) the most common craft followed by small powered boats (36 percent) and large powered boats (34 percent).

Boaters outside of Sydney are more likely to own a paddlecraft (45 percent) and powered boats less than 4.8m long (44 percent), while Sydney boaters are more likely to own powered boats more than 4.8m long (37 percent).

Boaters aged over 50 are more likely to own unpowered dinghies or tinnies (17 percent), and sail boats over 4.8m long (12 percent).

Those aged under 50 are more likely to own SUP boards (11 percent), and PWC (7 percent).

3.2.2 Storage

Across almost all vessel types, the registered address is the most common place of storage. For all vessel types, around 10 percent are stored at an address different to the registered address.

Sail boats more than 4.8m long are the exception, with the majority (63 percent) being stored on a mooring. An additional 16 percent are berthed at a marina while 15 percent of sail boats are kept in a dry storage facility.

3.3 Last trip on NSW waters

3.3.1 Vessel type

Powerboats (61 percent) and paddlecraft (21 percent) were the most common vessels used on the participant's last trip on NSW waters.

Those in the Sydney maritime region are most likely to have used a large power boat (39 percent) whereas those in the north of the State are more likely to have used a small power boat (33 percent).

3.3.2 Skippering and experience

Over 80 percent of those on power boats and large sailing boats identified themselves as being the skipper of the vessel on their last trip.

Women are significantly less likely to identify themselves as the skipper (38 percent) when compared with men (92 percent).

Sail boat users describe themselves as having the highest levels of experience (76 percent 'very experienced'), followed by powered boats (51 percent for large power boats and 41 percent for small power boats) and paddlecraft (28 percent).

In comparison, those using PWC report as being the least experienced (16 percent).

Men (44 percent) are more likely than women (30 percent) to describe themselves as 'very experienced'.

3.3.3 Passengers

Almost a third of users of NSW waterways (30 percent) went on their last trip alone while 24 percent went with just one other person.

The age of passengers varies between vessel types with large sail boat passengers tending to be the oldest (39 percent were aged 55 or older) while PWC had the youngest passengers (66 percent) are aged under 35.

3.3.4 Details of most recent trip

Across almost all vessel types, the registered address is the most common place of storage. For all vessel types, around 10 percent are stored at an address different to the registered address.

Nearly 90 percent of trips on NSW waterways are single-day events.

Of all vessels, sailing trips are significantly more likely to go overnight (45 percent) compared to only nine percent of powered boats trips, eight percent for paddlers and five percent for PWC.

Among those who stayed out overnight, over half (54 percent) returned one to two days after setting out while nearly one quarter (24 percent) spent five days or more on the trip.

The vessel launch location is significantly influenced by the type of craft, with powered boats (88 percent) and PWC (97 percent) more likely to be launched at a boat ramp.

In comparison large sailing boats are more likely to depart from a mooring (73 percent) or marina (15 percent).

Most trips covered more than one type of waterway with rivers (49 percent) and harbours (45 percent) being the most common while only 19 percent of trips involved travel on open waters.

Fishing was identified as the main purpose of the trip for over half (55 percent) of participants followed by cruising or sightseeing (22 percent).

Those in powered boats are most likely to identify fishing as the purpose of the trip (55 percent) while cruising or sightseeing is most common on sailing boats (65 percent) and PWC (64 percent).

Fishing was more likely to be the main purpose of the last trip for the following groups:

- NSW Maritime Regions: north (60 percent), south (64 percent), Sydney (48 percent)
- CALD (65 percent), non-CALD (54 percent)
- Persons aged under 50 (60 percent), over 50 (49 percent)
- Men (58 percent compared with 24 percent of women)

3.3.5 Safety planning

Lifejacket use varies significantly between the types of vessel used, which can be seen as a reflection of the different rules and regulations for vessels.

All PWC operators wore a lifejacket for the whole duration of their last trip while people in paddlecraft also have high usage, with 81 percent wearing a lifejacket for the whole trip.

In comparison, only one in five (19 percent) of those who used a sail boat larger than 4.8 metres wore a lifejacket for the duration of their trip.

The vast majority (80 percent) of passengers aged under 16 wore a lifejacket all of the time when on the water compared with 29 percent of those aged over 16.

Sydney residents were more likely to say they did not wear a lifejacket at all on their last trip (38 percent) compared with 26 percent of those in the rest of NSW.

Differences in lifejacket wear may be due to differences in the popularity of certain vessel types in Sydney compared to regional areas.

Nearly all powered vessels and large sail boats carried enough lifejackets (94 percent) for all passengers, an anchor (92 percent) and drinking water (91 percent) on their last trip.

Only one percent of vessels do not carry any safety equipment noting that the survey captures standup paddle boards which are not required to carry such items.

3.3.6 Safety precautions

Most people who go boating recreationally on NSW waters checked the weather before leaving home (85 percent) and then observed the conditions prior to launching (87 percent) on their last trip.

Among those that checked the weather, 70 percent looked at the Bureau of Meteorology (BOM) website and/or mobile app (60 percent).

Only one percent of participants indicated that they only used outside conditions as their single method of checking the weather prior to their trip.

The vast majority of people using NSW waterways avoid using alcohol and drugs when on their trip.

Six percent of participants consumed alcohol before their trip or while they were on the water, and almost none (0.1 percent) used drugs.

Men (58 percent compared with 24 percent of women)

3.4 Information and education

3.4.1 Information

An overwhelming majority of participants (94 percent) have looked for information related to recreational boating or watercraft in the past 12 months.

Over two thirds (67 percent) of participants seeking information have done so through a general internet search with 45 percent looking to the RMS website for information.

The places people search for information is influenced by age with younger respondents (16-34 years) being more likely to source information in person either from their tackle and bait shop (40 percent) or family and friends (32 percent).

People over 50 are more likely to look at print sources as their main source of information, including magazines (25 percent) and published guides (22 percent).

Forty three percent of people who use the waterways are members of a boating or watercraft club with fishing clubs being the most common (16 percent).

3.4.2 Education

Less than half of people who use NSW waterways (45 percent) have completed a boating safety course, with sailors (62 percent) and PWC riders (58 percent) the most likely.

From those that have completed a safety course, 40 percent completed it through a boating college or training organisation.

3.5 Waterways management

3.5.1 Infrastructure

The majority of people who use NSW waterways (64 percent) are satisfied with the overall standard of infrastructure on the waterways.

Those coming from outside of the State are more satisfied with the standard of infrastructure on NSW waterways (81 percent) when compared with 64 percent of NSW residents.

Despite the overall level of satisfaction being relatively strong, 60 percent of participants expressed some negative sentiment towards the standard of infrastructure when asked for details.

One in five (21 percent) had issues with the standard of boat ramps while other concerns included parking (nine percent), signage (seven percent), access to moorings (seven percent) and safety (six percent)

In comparison, one third (33 percent) expressed positive sentiments when asked for details about why they were satisfied.

The provision of good information was the positive issue most often mentioned (10 percent) while ramp maintenance (nine percent) and good facilities (seven percent) also rated highly.

3.5.2 Environmental management

Three in five people who use NSW waterways (62 percent) are generally satisfied with the environmental management of NSW waterways.

No significant differences were found within demographic subgroups, including maritime region or activity type.

However, over half (52 percent) have at least some negative sentiments towards the environmental management of NSW waterways when asked for details. The amount of rubbish (14 percent) and pollution (10 percent) being among the chief concerns.

Those in Sydney are more likely than others to express negative sentiment about rubbish (19 percent) and pollution (15 percent) when compared to the rest of the state.

When asked for details, 38 percent expressed positive sentiments about environmental management with 16 percent stating that the waterways are being kept in pristine condition.

3.5.3 Issues on NSW waterways

Debris in the marine environment was identified as the biggest issue on NSW waterways with 47 percent of participants believing it to be a 'big problem'.

The vast majority of recreational boaters on NSW waterways (84 percent) believe excessive speed is a problem.

Sailors (49 percent) and paddlers (48 percent) are the most likely to find excessive speed to be a 'big problem', especially when compared to PWC riders (26 percent).

In addition, four in five recreational boaters on NSW waterways (82 percent) believe vessel wash is a problem, with the number higher among sailors (61 percent) believe this a 'big problem'.

Operators of PWC (37 percent) are significantly more likely to say vessel wash is not a problem.

The vast majority of respondents (82 percent) regard the general attitude or behaviour of others on the waterways as a problem.

PWC riders (80 percent), powerboats (41 percent) and people involved in tow sports (40 percent) were identified as the chief cause of these issues among boat users.

In addition, the vast majority of recreational boaters on NSW waterways (86 percent) believe boaters getting too close or not keeping a proper look out is a problem. This is a particularly big issue for paddlers (43 percent) but again, far less so for PWC riders (24 percent).

Just over half (51 percent) of people who use the waterways are satisfied with the number of patrols on NSW waterways while 49 percent are also satisfied with the penalties in place for breaches of NSW Waterway regulations.

3.6 Satisfaction with maritime service providers

Over one third (34 percent) of recreational boaters on NSW waterways have had contact with Service NSW (SNSW) or Roads and Maritime Services (RMS) in the past 12 months.

Among those that have visited SNSW (79 percent) and the RMS (77 percent) in the last 12 months, the majority were satisfied with the service they had received.

The majority of positive comments focused on helpful information (24 percent), customer service and professionalism (19 percent) and prompt service (18 percent).

Negative sentiments (34 percent) tended to be focus on long wait times (17 percent) and a lack of staff training or knowledge (10 percent).

3.7 Conclusion

The Boating Participation Survey will assist in determining the current participation level of recreation boating within New South Wales waterways.

The survey results will also be used in continuing to build a better understanding of behaviours and attitudes to help support ongoing improvements to products, services and infrastructure.

This is the first time a survey of this nature has been carried out in NSW. The Centre for Maritime Safety will repeat the survey in future years as required.

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