



Transport for NSW
Centre for Maritime Safety

Recreational Boating in NSW 2019 Survey Results



Contents

Introduction	3
Summary 2019	4
1. Recreational boat and watercraft ownership	6
1.1. Vessel ownership	6
1.2 Vessel storage and access to moorings	6
1.3 Safety equipment	7
2. Profile of trips taken on NSW waterways	9
2.1 Vessel type	9
2.2 Skippering and experience	9
2.3 Passengers	11
2.4 Characteristics of the most recent trip	12
2.5 Safety, planning and preparation	13
3. Boating information and education	16
3.1 Information	16
3.2 Education	16
4. Waterways management	17
4.1 Infrastructure	17
4.2 Environmental management	18
4.3 Key issues on NSW waterways	18
4.4 Enforcement on waterways	18
5. Safety incidents	19
5.1 Involvement in incidents	19
5.2 Reporting of incidents	19
5.3 Involvement in 'near misses'	19

Introduction

This report outlines the key findings of the 2019 survey on recreational boating in NSW. 2019 is the second consecutive year the survey has been conducted among recreational waterway users in NSW.

The survey aims to provide a detailed understanding of boater characteristics and boating activity in NSW. Annual survey data helps Transport for NSW (TfNSW) identify changes in the nature of recreational boating participation and activities over time.

The 2019 survey was completed by 2,191 online participants between May and July. The survey was promoted via digital (e.g. social media, websites, email) and partner (e.g. boating clubs and associations) channels during this time.

Survey results provide community-based evidence to help inform strategy, policy and education initiatives which aim to deliver safer waterway use, greater participation and waterway access across NSW.

Key topics covered in the survey include:

- vessel ownership and storage;
- safety knowledge, attitudes and behaviours;
- characteristics of trips taken on NSW waterways;
- waterway infrastructure; and
- incidents and 'near misses.'

Recreational boating in NSW: 2019 Snapshot

Boating habits



94% of recreational boaters own a vessel
48% own two or more vessels

Powered boats and paddle craft are the most common vessels used on boating trips



61%
Powered boats



21%
Paddle craft

↑ 6%

Satisfaction with waterway infrastructure has increased (up 6% to 70%)

Fishing remains the most common purpose of boating trips



55%
Fishing



24%
Cruising & sightseeing

74%

Nearly three quarters of boaters use a boat ramp or car park



62% of boaters are not members of a boating-related club
(up 5% vs. 2018)

Skills & experience

Far more sailors report to have 10+ years experience compared to paddlers



70%
Sailors



35%
Paddlers

Nearly all male boaters claim to be their vessel's skipper. Far fewer female boaters make the same claim.



94%
Male



35%
Female

Recreational boating in NSW: 2019 Snapshot

Safety



95% of vessels carry enough lifejackets for everyone onboard

Most PWC users and paddlers self-report to wear a lifejacket all of the time



100%
PWC (e.g. jet skis)



96%
Paddle craft (↑ 28% vs. 2018)



85% of boaters check the weather before leaving home

50%

About 1 in 2 boaters are satisfied with the level of waterway enforcement by NSW Police and NSW Maritime

Only 3% of boaters self-reported being involved in a safety incident*

* during the previous summer period

82%

More than 4 in 5 boaters see the attitude or behaviours of other waterway users as problem.



Findings

1. Recreational boat and watercraft ownership

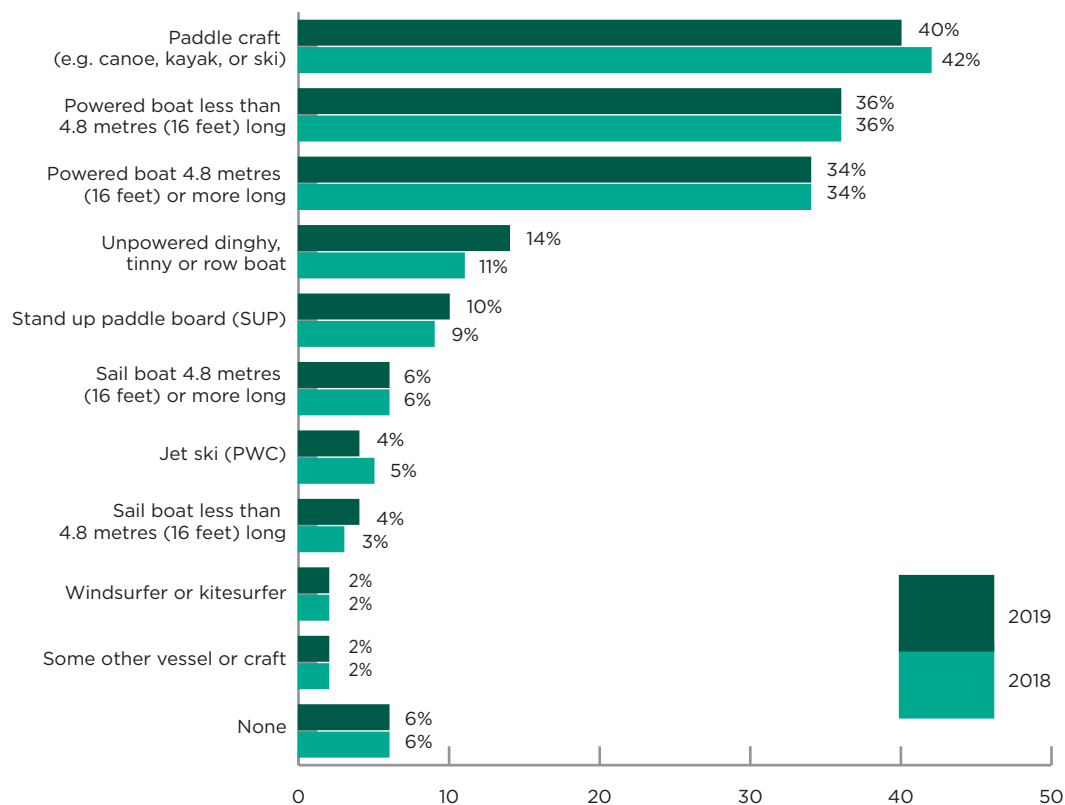
1.1. Vessel ownership

In line with 2018, 94 per cent of NSW waterway users own a recreational vessel. Of these,

- 40 per cent own paddle craft;
- 36 per cent own small powered boats; and
- 34 per cent own large powered boats.

The proportion of NSW waterways users that own more than one vessel is 48 per cent, reflecting a similar result to 2018 (50 per cent).

Figure 1: Vessel ownership



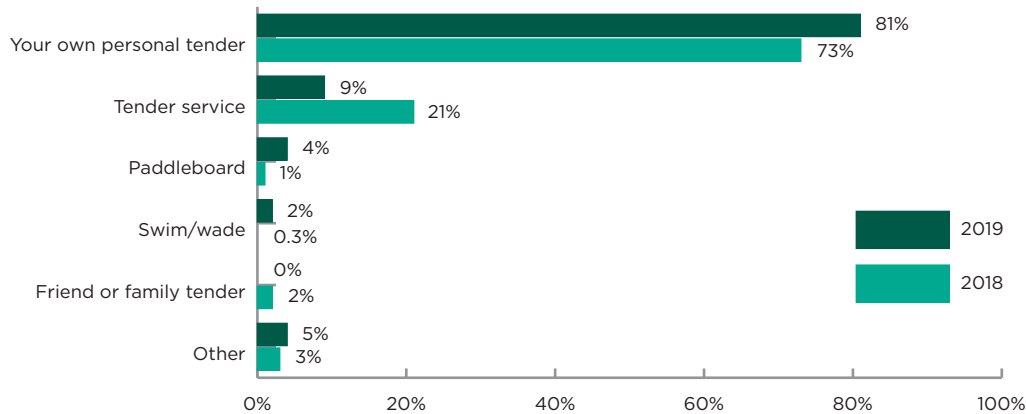
Q1. Which, if any, of the following types of recreational boats or watercraft does your household own?
 (Base: All respondents, 2018: n = 3,078, 2019: n = 2,191)

1.2 Vessel storage and access to moorings

The majority of owners (63 per cent) store their vessel at their registered address. 59 per cent of larger sail boats (more than 4.8m long) continue to be stored on a mooring. Fewer windsurfers and kitesurfers are stored at their registered address (65 per cent in 2019 compared to 73 per cent in 2018).

Of those who use a mooring, the proportion that reach their vessel using their own tender has increased (81 per cent, compared to 73 per cent in 2018), while the use of a tender service has decreased (9 per cent, compared to 21 per cent in 2018). Figure 2 provides a full breakdown of how moorings are accessed.

Figure 2: Access to moorings



Q4a. How do you reach the mooring?

(Base: those who have a vessel stored at a mooring 2018: n= 307; 2019: n=247)

1.3 Safety equipment

There has been an increase in Emergency Position Indicating Radio Beacons (EPRIBs) carried onboard large sail boats (73 per cent, compared to 62 per cent in 2018). There has also been a decrease in lifejackets carried on board small sail boats (71 per cent, compared to 77 per cent in 2018). The proportion of vessels carrying no safety equipment remains highest for small sail boats (12 per cent). Table 1 provides more detailed data on the carriage of various safety equipment on various vessel types.

Table 1: Safety equipment carried onboard

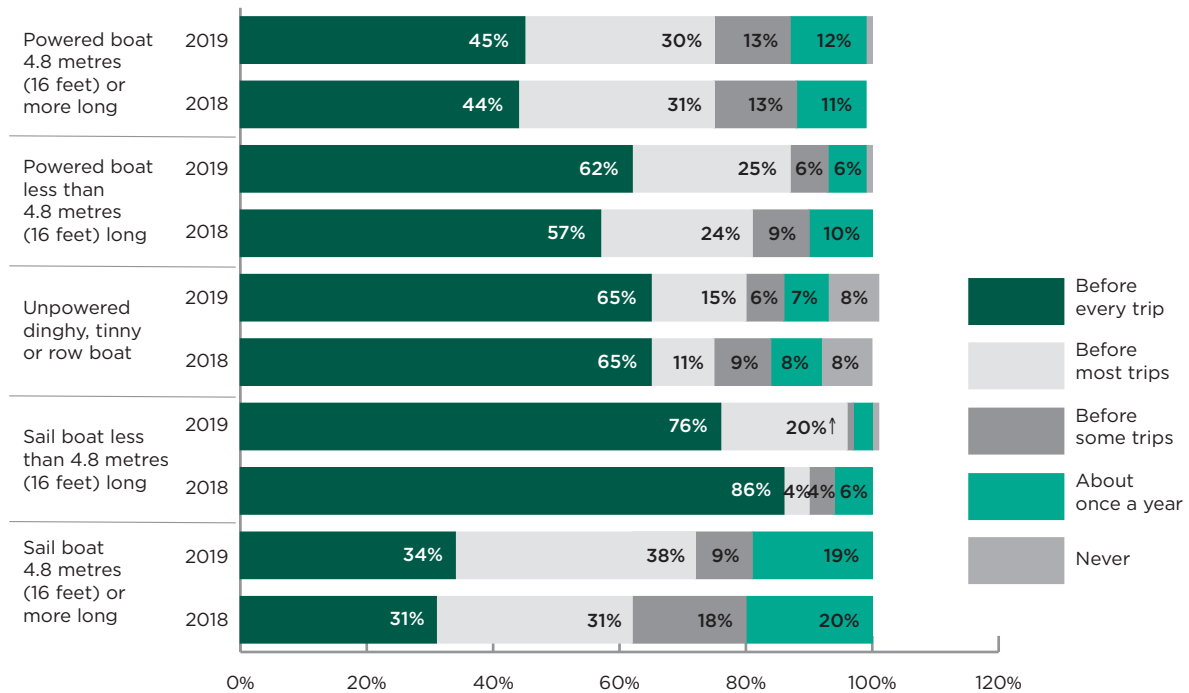
	Powered boat 4.8 m (16 feet) or more long		Powered boat less than 4.8 m (16 feet) long		Sail boat 4.8 m (16 feet) or more long		Sail boat less than 4.8 m (16 feet) long		Unpowered dinghy, tinny or row boat	
	Year	2018	2019	2018	2019	2018	2019	2018	2019	2018
n	1310	978	1348	954	319	260	103	116	334	295
Lifejackets for every passenger on board	99%	99%↓	95%	97%	97%	99%	77%	71%	65%	64%
An anchor	99%	99%	93%	95%	92%	95%	17%	17%	51%	49%
Fire extinguisher	97%	98%	71%	72%	90%	94%	4%	10%	11%	10%
Drinking water	94%	93%	83%	83%	93%	97%	47%	52%	31%	32%
Waterproof floating torch	92%	94%	78%	81%	88%	93%	13%	8%	31%	24%
Sound signal (horn/whistle)	91%	91%	72%	70%	85%	88%	13%	8%	22%	17%
A bucket with lanyard	90%	93%	86%	88%	92%	96%	30%	44%	51%	49%
Compass	84%	82%	50%	47%	84%	92%	17%	34%	9%	11%
Marine radio	83%	80%	38%	38%	84%	86%	8%	9%	7%	2%↓
Oars	82%	79%	91%	91%	37%	30%	34%	18%	86%	81%
V sheet	77%	78%	44%	44%	75%	87%↑	4%	5%	5%	9%
Flares	77%	74%	38%	34%	75%	86%↑	4%	8%	6%	6%
Map or chart	75%	56%↓	46%	28%↓	83%	83%	15%	7%	10%	6%
An EPIRB	60%	60%	17%	17%	62%	73%	7%	4%	3%	1%
GPS digital chart	N/A	72%	N/A	34%	N/A	68%	N/A	5%	N/A	2%
Mobile phone	N/A	97%	N/A	91%	N/A	95%	N/A	32%	N/A	61%
None of these	0%	0%	1%	1%	1%	0%	12%	12%	7%	8%

Q5. Which, if any, of the following boating equipment do you carry on board your vessel? Participants are counted in all categories in which they own a vessel.

↑↓ Denotes directional statistically significant difference for 2019 result compared to 2018 result

The regularity of performing checks on safety equipment continues to vary between vessel types. Safety checks are still most common on small sail boats and least common on large sail boats. As in 2018, the majority of boaters perform safety checks before most trips.

Figure 3: Frequency of checks on safety equipment



Q5A. How often do you check the safety equipment for your vessel?

↑ Denotes directional statistically significant difference for 2019 result compared to 2018 result

2. Profile of trips taken on NSW waterways

2.1 Vessel type

Powered boats and paddle craft remain the most common vessels used in 2019. As in 2018, 61 per cent used a powered boat and 21 per cent used a paddle craft.

Those in the Sydney region are more likely to have used a large power boat (44 per cent), whereas those in northern and southern NSW are more likely to have used a small power boat (32 per cent and 34 per cent respectively).

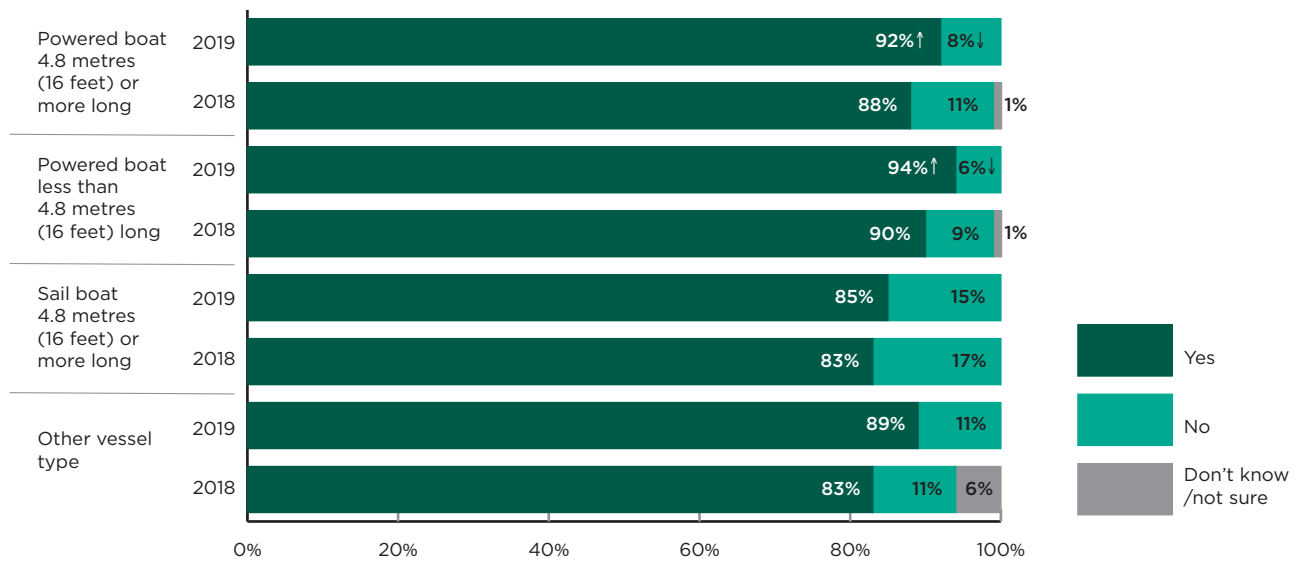
2.2 Skippering and experience

At least 85 per cent of boaters on all vessel types identified themselves as being the skipper on their most recent trip.

Similar proportions of sailors identify themselves as being the skipper of the vessel on their most recent trip in 2019 as in 2018. However, more of those in powered boats identify themselves as the skipper in 2019.

Women are significantly less likely to identify themselves as the skipper (35 per cent) compared to men (94 per cent).

Figure 4: Skipper of vessel



Q8. And were you the skipper of this vessel?

(Base: Powered boats and sail boats 4.8 metres or more in length, 2018: n=2574, 2019: n=1862)

↑↓ Denotes directional statistically significant difference for 2019 result compared to 2018 result

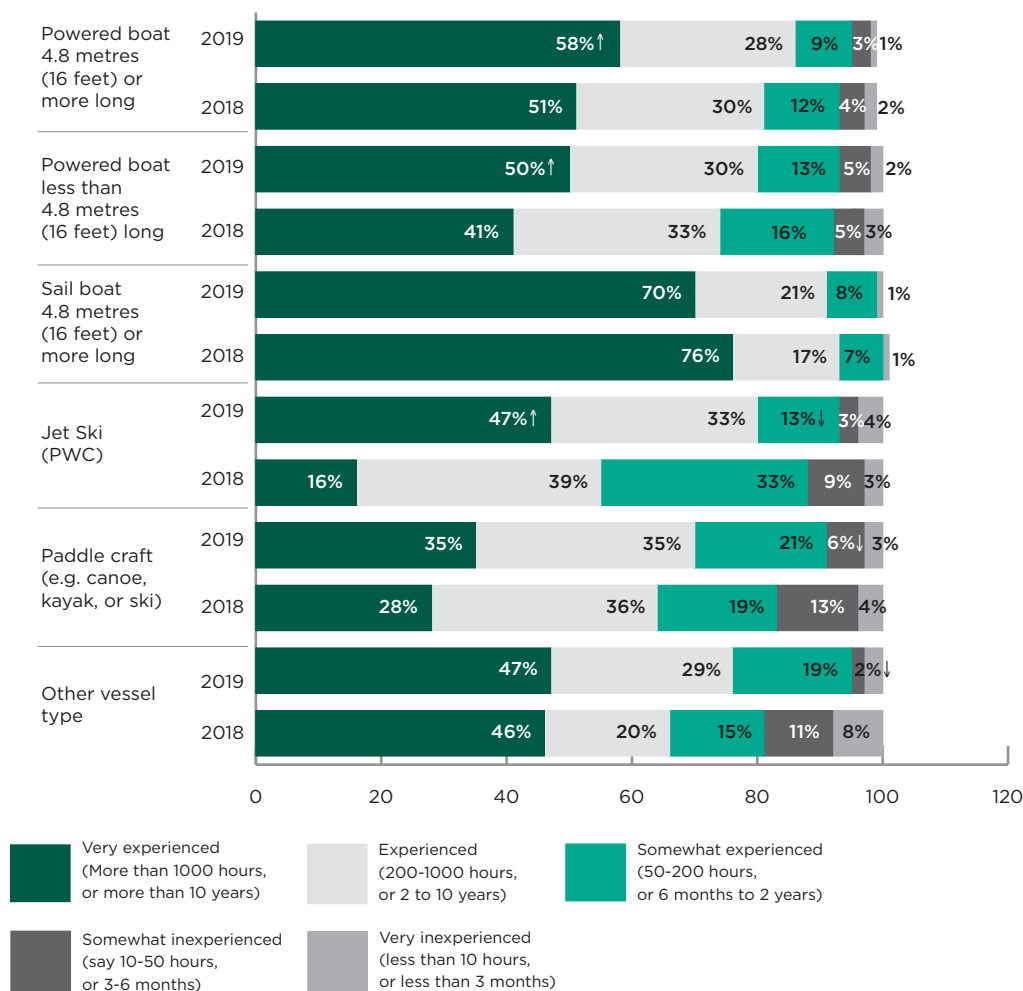
Sailors self-report to have the highest levels of experience with 70 per cent identifying as 'very experienced', although this was a 6 per cent drop from 2018.

Significantly more boaters identified themselves as 'very experienced' in 2019 compared to 2018. On large power boats, those who self-reported as 'very experienced' increased from 51 to 58 per cent between 2018 and 2019, and from 41 to 50 per cent for the same period on small power boats.

The proportion of personal watercraft (PWC) riders self-reporting as 'very experienced' has significantly increased from 16 to 47 per cent between 2018 and 2019. Those using paddle craft are self-reporting the least amount of experience, with just 35 per cent identifying as 'very experienced'.

Across all vessel types, 51 per cent of men describe themselves as 'very experienced' compared to 29 per cent of women.

Figure 5: Experience with vessel used on most recent trip



Q7. How experienced in using a <vessel type> are you?

(Base: Boated recreationally in NSW waters between December 2017 and February 2018, 2018: n=3066, 2019: n=2178)

↑↓ Denotes directional statistically significant difference for 2019 result compared to 2018 result

2.3 Passengers

The number of passengers on trips has not changed significantly in the past year. Among those who used NSW waterways, 34 per cent went on their most recent trip alone and 26 per cent went with another person.

Among those who were accompanied by other passengers on their most recent trip, the majority of other passengers were male. However, there was a 5 percent decrease in male passengers in 2019 (65 per cent, compared to 70 per cent in 2018), corresponding with a 5 per cent increase in female passengers (35 per cent, compared to 30 per cent in 2018).

The age of passengers varies between vessel types. Large sail boat passengers are more likely to be older, with 44 per cent above 55 years old. In contrast, 76 per cent of PWC passengers are below 35 years old.

2.4 Characteristics of the most recent trip

Trip durations have not changed in the past year, with 88 per cent of trips remaining a one-day event. Sailing trips are more likely to go overnight (44 per cent) when compared with power boat trips (11 per cent), paddling trips (11 per cent) and PWC trips (3 per cent).

Among those who stayed out overnight, 51 per cent returned within 2 days of heading out while 20 per cent spent five days or more before returning to shore.

There were fewer launches from boat ramps in 2019 (66 per cent) than in 2018 (71 per cent). Launches from marinas have increased from 3 to 5 per cent between 2018 and 2019.

A large majority of power boats (86 per cent) and PWCs (96 per cent) are launched at boat ramps. Only 33 per cent of paddle craft users launch at boat ramps, compared to 46 per cent in 2018. For large sailing boats, 71 per cent launch from a mooring and 18 per cent launch from a marina.

As in 2018, most boating trips covered more than one type of waterway, with rivers and harbours most commonly used. Trips on open water accounted for 18 per cent of boating trips.

The purpose of trips on NSW waterways have not changed considerably. 54 per cent of NSW waterway users surveyed cited fishing as the main purpose of their most recent trip while 24 per cent cited cruising or sightseeing.

Table 2: Purpose of most recent trip by vessel used

	Powered boat 4.8 m (16 feet) or more long		Powered boat less than 4.8 m (16 feet) long		Sail boat 4.8 m (16 feet) or more long		Jet ski (PWC)		Paddle craft		Total	
	Year	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018
n	1255	935	955	644	295	239	176	87	277	197	3066	2178
Fishing (angling)	65%	59%↑	82%	83%	1%	0.3%	11%	3%	40%	41%	55%	54%
Cruising/sightseeing	19%	26%↑	9%	11%	65%	65%↑	64%	73%	28%	21%	22%	24%
Fitness/training	0.4%	0.2%↓	1%	0.2%	1%	0.2%↓	2%	4%	19%	23%	7%	6%
Towing activities (e.g. water-skiing, wakeboarding, etc.)	9%	8%	3%	1%↓	0%	0%↓	17%	11%	0%	0%	5%	4%
Racing	0.2%	0%↓	0.1%	0.2%	27%	21%↑	2%	3%	2%	2%	3%	2%
Other purposes	6%	7%	5%	5%	6%	13%	4%	6%	10%	13%	8%	10%

Q12. What was the main purpose of this trip?

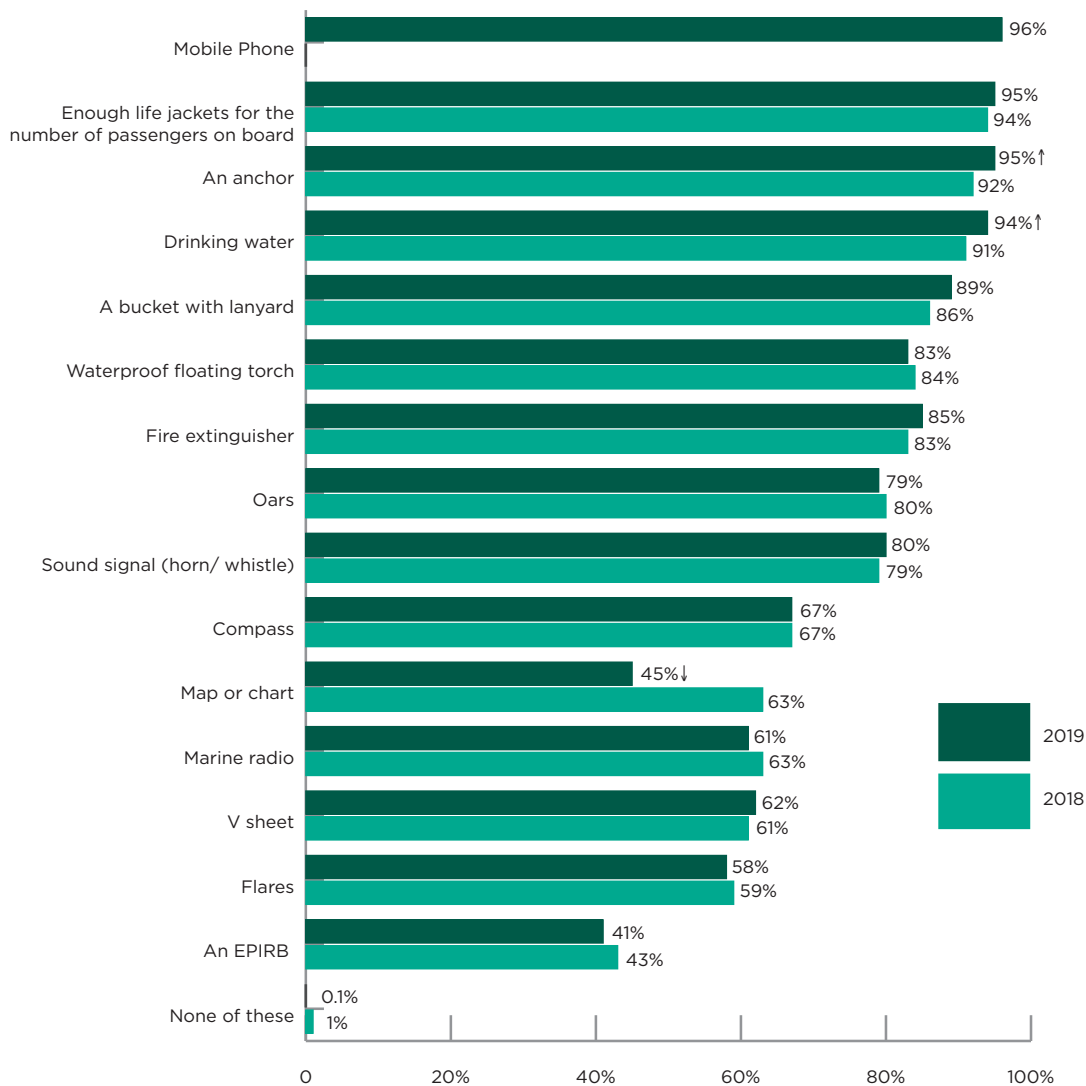
(Base: Boated recreationally in NSW waters, 2018: n=3066, 2019: n=2178).

↑↓ Denotes directional statistically significant difference between subgroups.

2.5 Safety, planning and preparation

Rates of safety equipment use have not changed in the past year. A very high proportion of powered vessels, large sail boats and unpowered dinghys/row boats carried enough lifejackets for every person onboard (95 per cent), carried an anchor (95 per cent) or drinking water (94 per cent) on their most recent trip. Only 0.11 per cent of vessels do not carry any safety equipment, compared to 1 per cent in 2018.

Figure 6: Safety equipment onboard



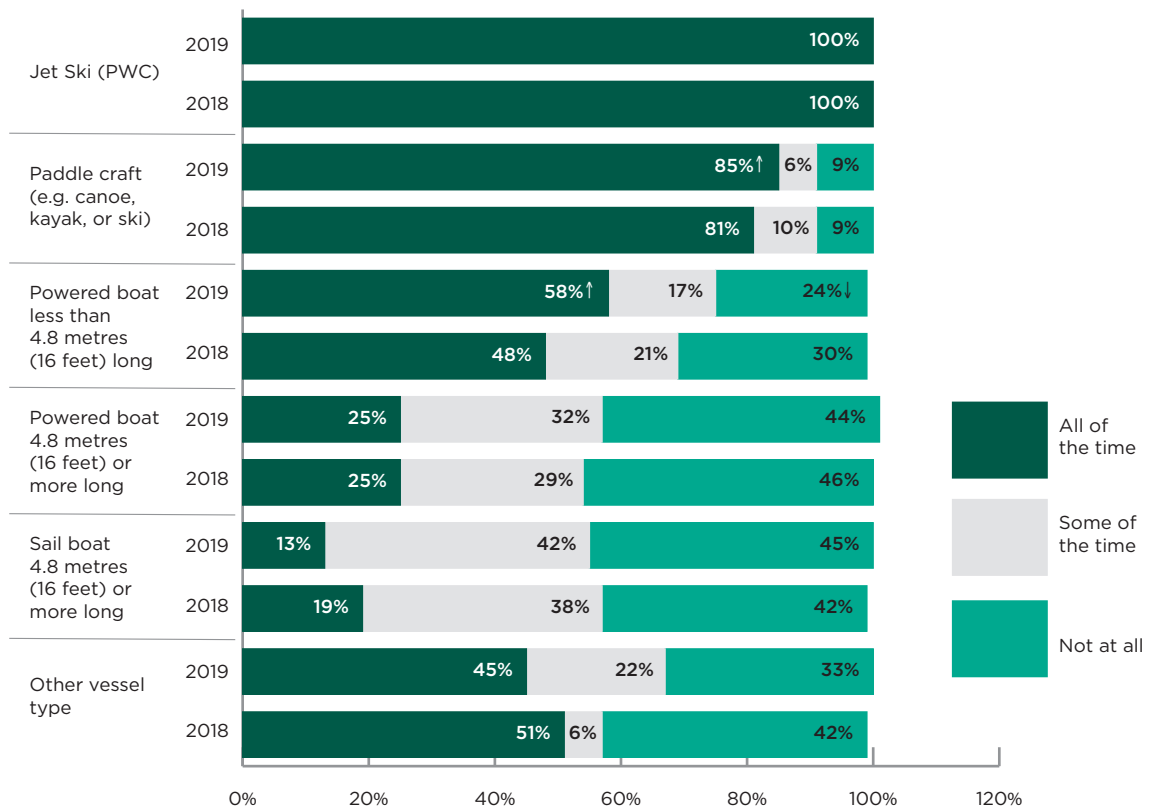
Q16. Which, if any, of the following safety equipment did you have onboard during this trip?

[Base: Those who used a powered boat, sail boat or unpowered dinghy/row boat in their last trip, 2018: n=2,574, 2019: n=1,862]

↑↓ Denotes directional statistically significant difference for 2019 result compared to 2018 result

Lifejacket use has increased among paddlers, with 85 per cent using one all of the time compared to 81 per cent in 2018. For those on small power boats, lifejacket use has increased from 48 to 58 per cent between 2018 and 2019. The rate of lifejacket use is unchanged for passengers on other vessel types.

Figure 7: Lifejacket use by vessel type

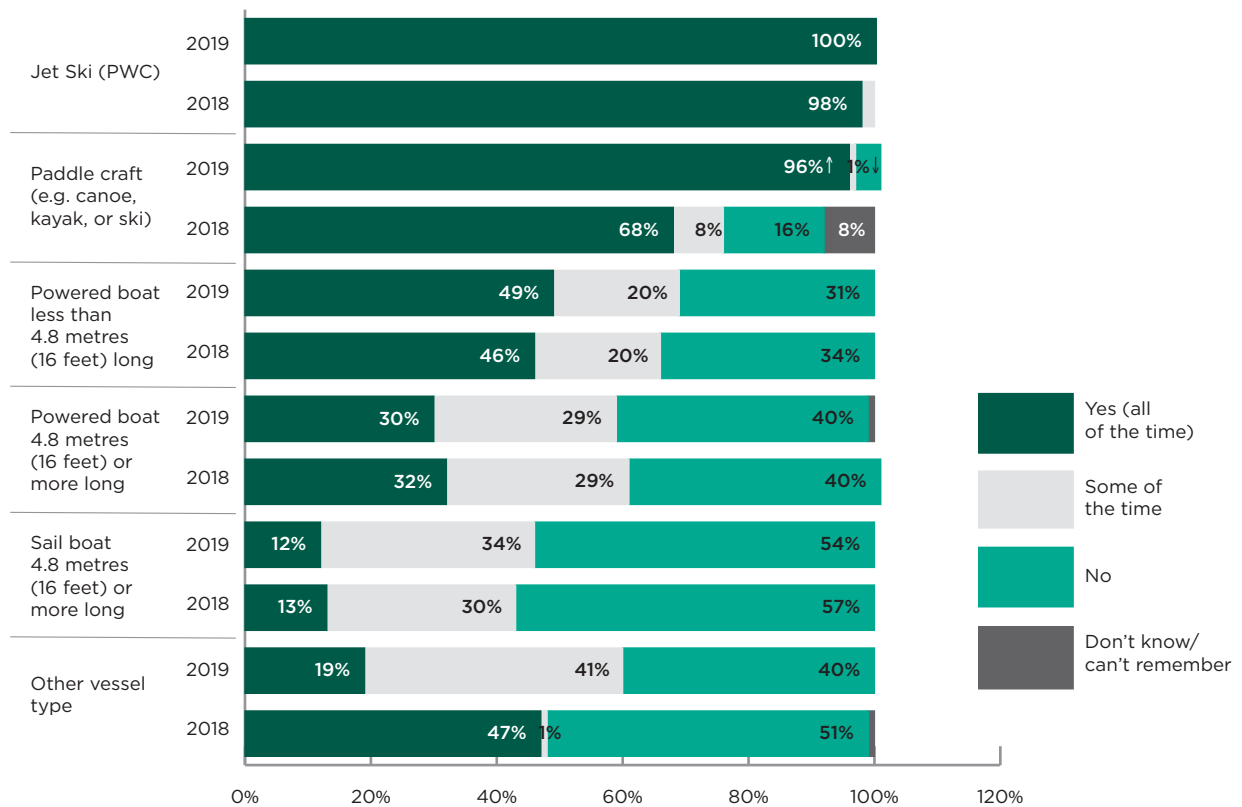


Q15. On this trip did you wear a lifejacket or personal flotation device (PFD)?
 [Base: Boated recreationally in NSW waters, n=3066 (2018), n=2178 (2019)]
 ↑↓ Denotes directional statistically significant difference between subgroups.

More Sydney residents (35 per cent) did not wear a lifejacket at all on their most recent trip compared to the rest of NSW (23 per cent).

Similarly to personal lifejacket use, passenger use varies by vessel type. There has been a substantial increase in lifejacket wear all of the time among paddle craft passengers (96 per cent in 2019 compared to 68 per cent in 2018).

Figure 8: Other passengers' lifejacket use



Q18. For each person onboard the vessel with you, were they wearing a lifejacket?

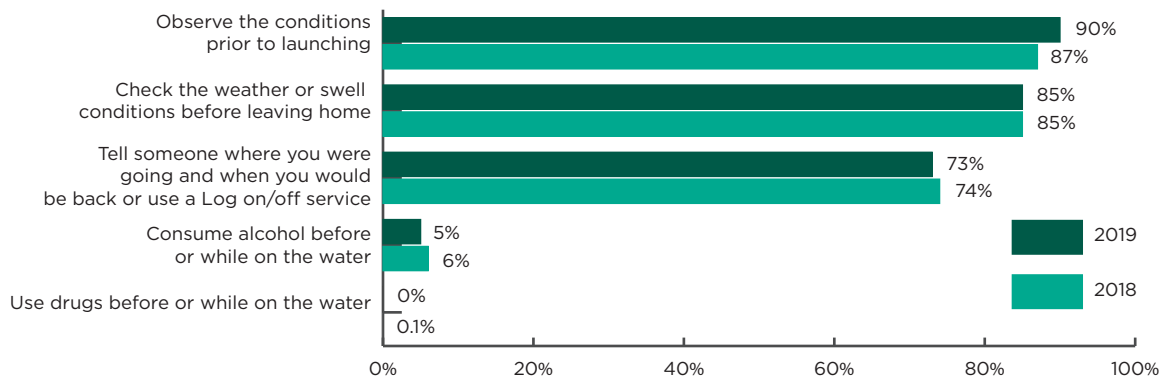
[Base: All respondents, n=3079 (2018), n=2191 (2019)].

↑↓ Denotes directional statistically significant difference for 2019 result compared to 2018 result

In 2019, 85 per cent of boaters checked the weather before leaving home, while 90 per cent observed the conditions prior to launching. 53 per cent of boaters used mobile apps in 2019 compared to 60 per cent in 2018. All other methods of checking the weather are stable compared to 2018. Among those who checked the weather, 72 per cent referred to the Bureau of Meteorology (BOM) website.

As in 2018, 5 per cent of boaters self-reported to have consumed alcohol before their trip or while they were on the water. A very small proportion (0.04 per cent) used drugs before or during their trip.

Figure 9: Safety-related behaviours undertaken before and during trip



Q13. On the day of this outing, which, if any of the following did you do?
 (Base: Boated recreationally in NSW waters, 2018: n=3066, 2019: n=2178).

3. Boating information and education

3.1 Information

93 per cent of NSW waterway users had looked for information related to recreational boating or watercraft in the past 12 months. The majority had searched for fishing spots or tips (56 per cent), or for boating laws and regulations (56 per cent).

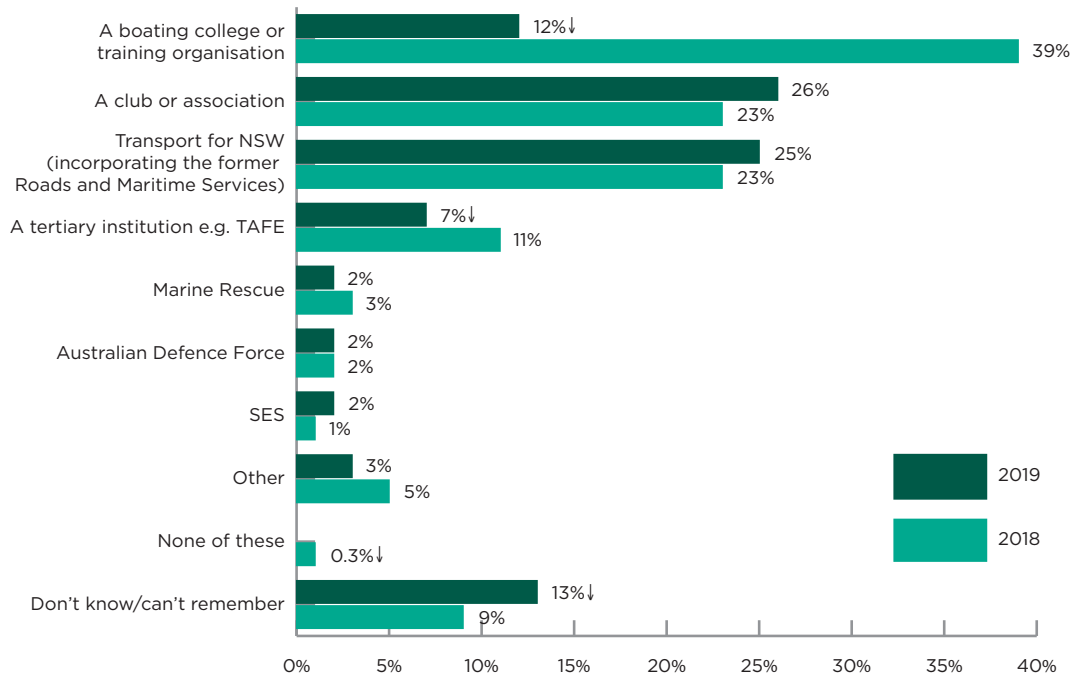
Most waterway users (68 per cent) use a search engine to perform a general internet search. Seeking information from TfNSW (incorporating the former Roads and Maritime Services) has increased from 45 to 54 per cent between 2018 and 2019. During the same period, use of phone apps to obtain information decreased. In 2019, 5 per cent of boaters directly visited the Centre of Maritime Safety website for information.

A larger proportion of waterway users are not members of a boating or watercraft club, increasing from 57 to 62 per cent between 2018 and 2019. Fishing clubs continue to be the most common type of membership, with 16 per cent of those surveyed belonging to one.

3.2 Education

A sizeable proportion of NSW waterway users (44 per cent) have completed a boating safety course. Sailors and PWC riders remain the most likely to have completed a course. Among those who have completed a safety course, 12 per cent completed a course through a boating college or training organisation (compared to 39 per cent in 2018).

Figure 10: Training provider



Q21a. Who provided this training?

(Base: All those who have completed a boating safety course, 2018, n=1,500; 2019, n=1,019)

↑↓ Denotes directional statistically significant difference between groups.

4. Waterways management

4.1 Infrastructure

Nearly three quarters of NSW waterway users (74 per cent) typically use boat ramps and boat ramp car parks when boating. 58 per cent use boat ramp toilets and 52 per cent typically use wharfs or jetties. These questions were new in the 2019 survey and therefore do not have results for 2018.

Overall satisfaction with the standard of infrastructure on NSW waterways increased from 64 to 70 per cent between 2018 and 2019. The standard of facilities and their level of maintenance were the most common positive reasons cited for satisfaction with waterway infrastructure.

Despite the overall level of satisfaction being relatively strong, 63 per cent of waterway users continue to express some dissatisfaction with specific elements of waterway infrastructure. Specifically, 18 per cent have issues with the standard of boat ramps, however this is a slight improvement compared to 2018 (21 per cent).

4.2 Environmental management

The majority of NSW waterway users (62 per cent) are generally satisfied with the environmental management of NSW waterways, which is comparable to 2018. However, when asked to elaborate, 55 per cent expressed some negative sentiments towards specific elements of environmental management (52 per cent in 2018). The amount of rubbish and pollution were the most common negative reasons cited.

In 2019, 12 per cent of waterway users agreed that waterways are being kept in pristine condition (compared to 16 per cent in 2018).

4.3 Key issues on NSW waterways

Perceptions of key issues on NSW waterways remain largely unchanged compared to 2018.

Marine litter and debris is still seen as the biggest issue on NSW waterways, with 89 per cent seeing it is a problem compared to 90 per cent in 2018.

A significant proportion of recreational boaters (82 per cent) think vessel wash is a problem on NSW waterways. The majority of sailors (56 per cent) think wash is a 'big problem' while PWC riders were most likely to believe it is 'not a problem' (32 per cent).

Most recreational boaters (83 per cent) believe excessive speed is a problem, although the proportion who consider it to be a 'big problem' is decreasing (from 39 to 34 per cent between 2018 and 2019). Similarly, fewer paddlers see excess speed as a 'big problem' (decreasing from 48 to 38 per cent between 2018 and 2019).

Boaters getting too close or not keeping a proper lookout also remains a highly-reported issue (84 per cent).

77 per cent of recreational boaters on NSW waterways believe alcohol or drug consumption by boat operators is a problem, although only 20 per cent view it as a 'big problem.'

Vessel sewage remains a secondary concern, with 60 per cent seeing it as a problem.

Interestingly, the majority of waterway users (82 per cent) regard the general attitude or behaviours of other users as a problem. PWC riders are most often cited as a problem by other users, followed by power boat and tow sports users.

4.4 Enforcement on waterways

Approximately half of boaters are satisfied with the number of NSW Police and NSW Maritime patrols on waterways (51 per cent and 55 per cent respectively). Satisfaction with the applicable penalties for breaches of NSW waterway laws and regulations remains similar to the previous survey (47 per cent in 2019 compared to 49 per cent in 2018).

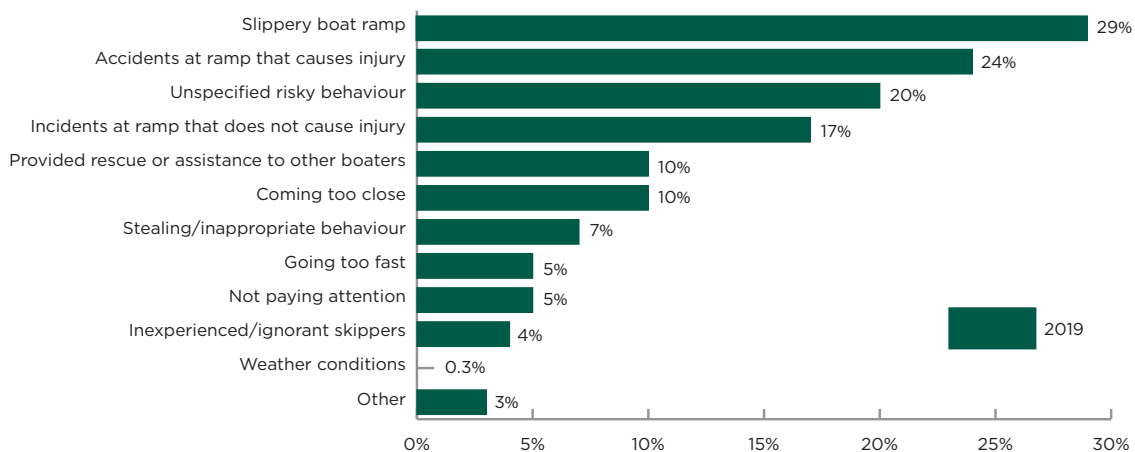
5. Safety incidents

The results reported in this section relate to new questions in the 2019 survey and therefore cannot be compared to 2018 results.

5.1 Involvement in incidents

A very small number of boaters (3 per cent) self-report being involved in an incident during the summer period, either on or near the water. Boat ramps are commonly cited in these self-reported incidents.

Figure 11: Incident type



Q27a_2019. If yes, please describe in a sentence or two.
(Base: Those who were involved in an incident during last summer, n=60).

5.2 Reporting of incidents

Of those involved in an incident, 42 per cent reported it.

5.3 Involvement in 'near misses'

A small number of boaters (13 per cent) self-report being involved in a 'near miss' during the summer period, either on or near the water. Speeding is the most common factor involved in self-reported 'near misses,' followed by not keeping a safe distance and not paying attention. PWCs and power boats are commonly cited in these self-reported 'near misses.'

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