

Quantum
Market
Research

Boating Behaviour Study 2022

Key findings

August 2022

About the research

About the Research

In 2022, Quantum Market Research was commissioned by Victorian Fisheries Authority, Safe Transport Victoria and Better Boating Victoria to conduct primary research into the behaviours and attitudes of boaters in Victoria.



Quantitative survey

- Online survey of n=2,063 boat/vessel owners and users
- Sample sourced from VicRoads database of Victorian registered boat/vessel owners and licensees and invitation on Better Boating Victoria's Facebook page
- Conducted from 6th to 27th June 2022
- Data was weighted according to the distribution of vessels in the VicRoads database



Qualitative focus groups

- Two online focus group discussions:
 - Mostly boat in metropolitan areas
 - Mostly boat in regional areas
- Sample sourced from people who participated in the quantitative survey
- Conducted from 6th to 7th July 2022
- Each group discussion ran for 1.5 hours, and all participants received compensation to cover expenses associated with participation



The project was carried out in line with the Market Research International Standard, AS ISO 20252

Summary

Summary – Boater and trip profiling

82%

of boat owners used their boat/vessel in the last 12 months

29%

used it all year around

Average trip duration was

4.6 hours

On average there were

3 people

on the boat/vessel

One in ten (9%)

usually went boating alone

The greatest barrier to boat/vessel use in the past 12 months (among those that didn't use it) was:

COVID restrictions (46%)

The main purposes for boating were:

Recreational fishing (56%)

Water sports (15%)

Leisure (15%)

The main factors considered when choosing where to launch from were:

Proximity to storage (39%)

Proximity to home (31%)



Summary - Satisfaction with boating experience

69%

of boaters were satisfied with their overall experience with boating facilities in Victoria

Mean score of 7.1 out of 10

Satisfaction was **highest** with:

Wait time - non-peak periods (84% satisfied)

Boat ramp proximity to home address (76%)

Navigation aids (69%)

Waterway drafts (69%)

Signage (68%)

Satisfaction was **lowest** with:

Other water users' behaviour (48% satisfied)

Access to landside attractions (51%)

Destination jetties (55%)



46%

noticed improvements to boating facilities in the past year

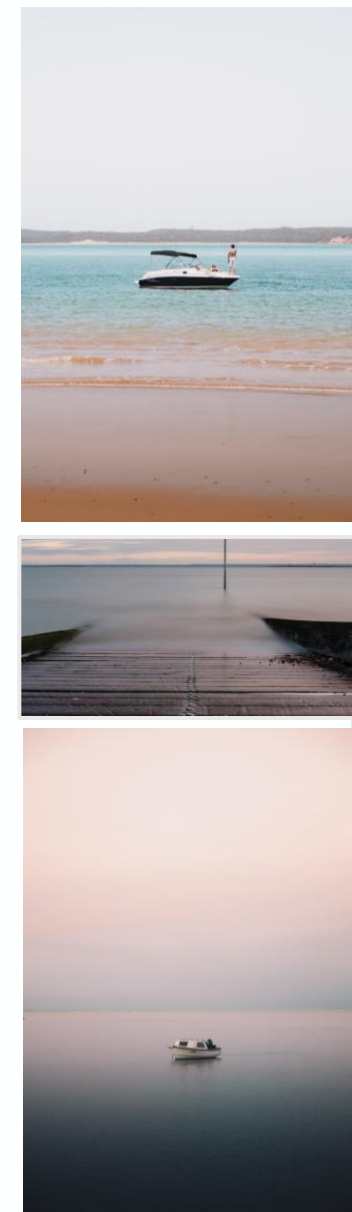
The following areas **improved** since 2014:

- **Wait times** - non-peak periods
- **Ramp proximity** to home
- **Signage**
- **Behaviour** of other boaters
- **Design & physical condition** of ramps
- **Parking**
- **Boating information**
- **Fish cleaning facilities**



Five key areas were identified for **improvement**:

1. Improved boat launch/retrieval facilities
2. More parking/car trailer units
3. More compliance/enforcement presence
4. Better navigation aids and signage
5. Better safety education programmes



Summary - Safety

12%

of boaters believed boating is a **risky activity**

94%

believed it's important to have all the necessary safety equipment for the boat/vessel

65%

performed safety checks before every trip
(drop from 77% in 2014)

89%

always check the weather

63%

wore a life jacket every time
(increase from 56% in 2014)

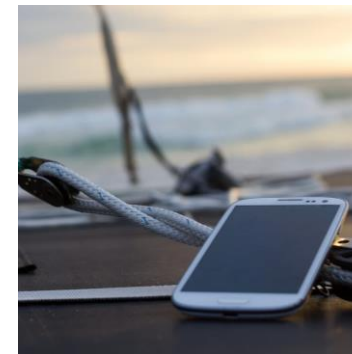
76%

always checked/ran the engine
(on par with 2014)

The greatest **perceived risks** associated with boating were:

Equipment failure/loss (69% ranked top 3)

Sudden weather changes (62%)

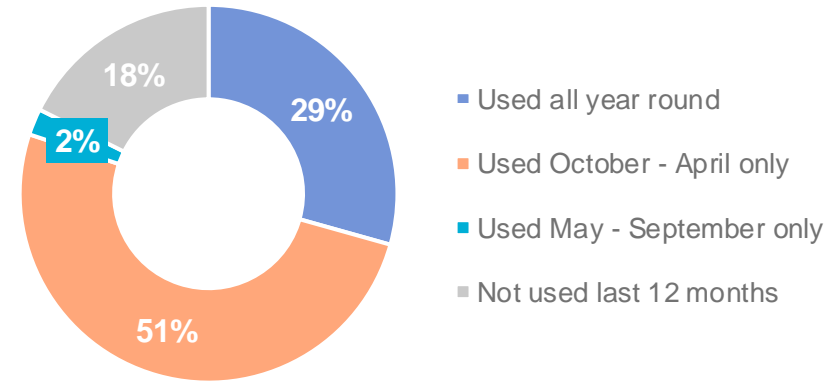
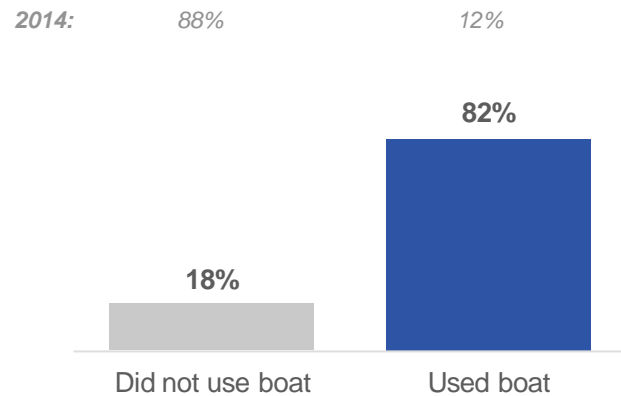


Key findings

Just over four in five boaters (82%) used their boat/vessel in the past 12 months, with the majority boating from October to April

Boat/vessel usage

Base: All respondents, n=2,063.

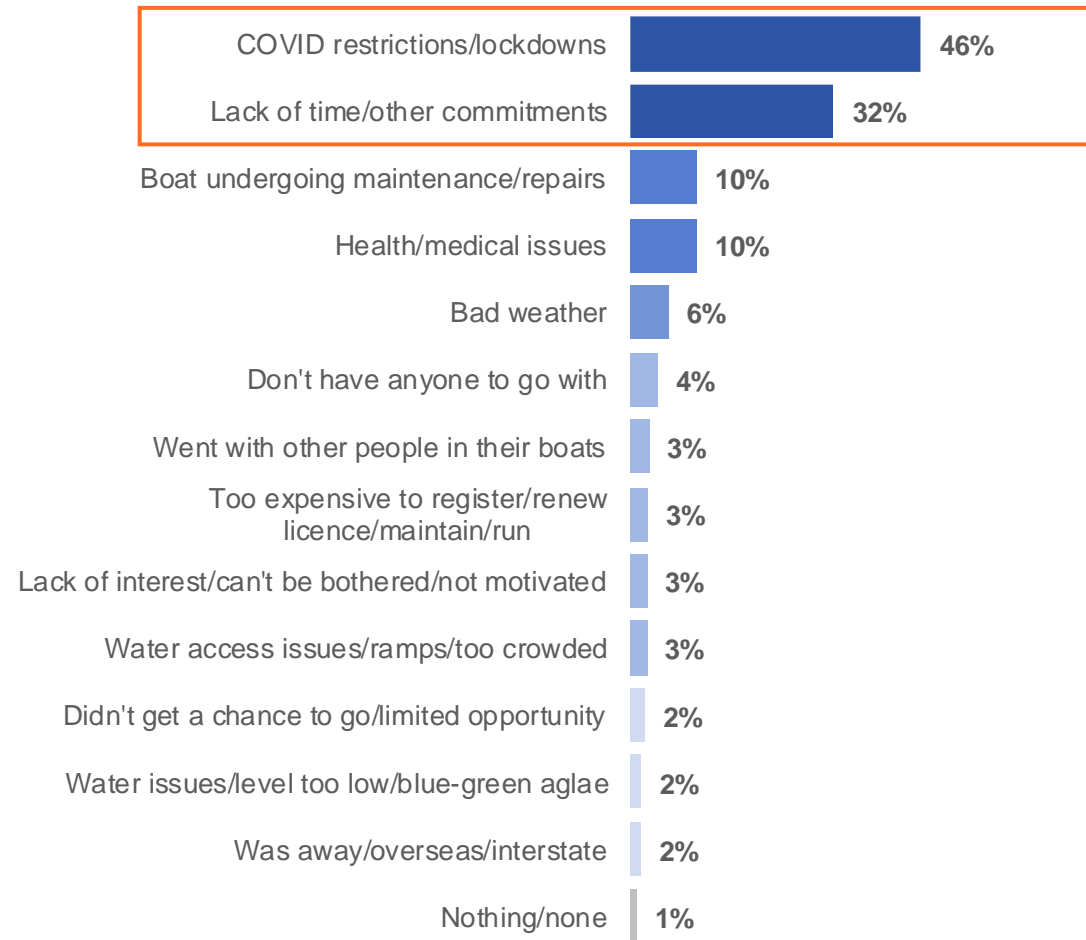


Boat/vessel usage by time of year

October through April		May through September	
2014	2022	2014	2022
84%	80%	35%	32%

Q3. In the last 12 months, did you use the boat/vessel...?

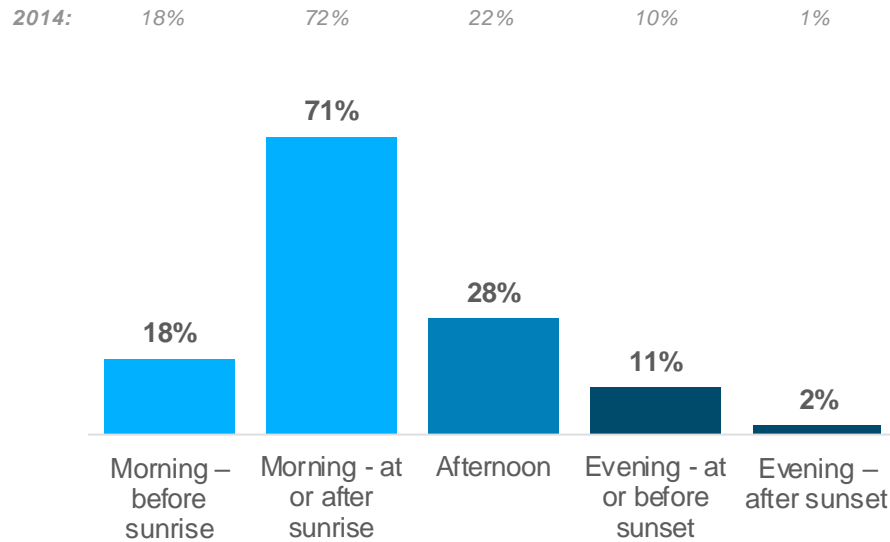
COVID restrictions (46%) followed by lack of time (32%) were the most common reasons for boaters not having used their boat/vessel in the last 12 months



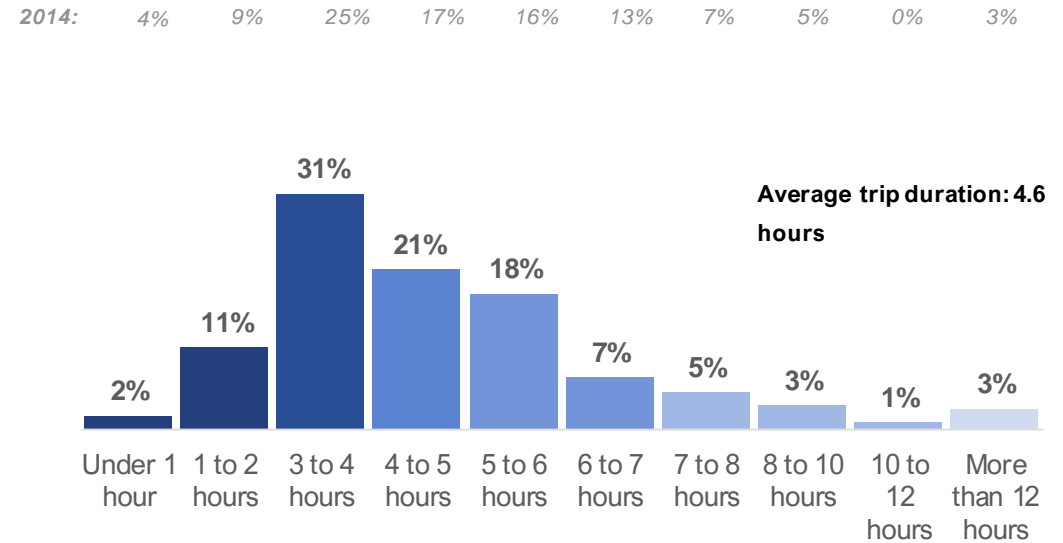
Base: Respondents who did not use their vessel in the last 12 months, n=346.
Q4. Why did you not use the boat/vessel in the last 12 months?



Most boaters began their trips at or after sunrise and lasted an average of 4 to 5 hours



Base: Respondents who used their vessel in the last 12 months, n=1,717. Q15. In the previous 12 months, what time of the day did you usually commence your trip? Note: Multiple response possible.

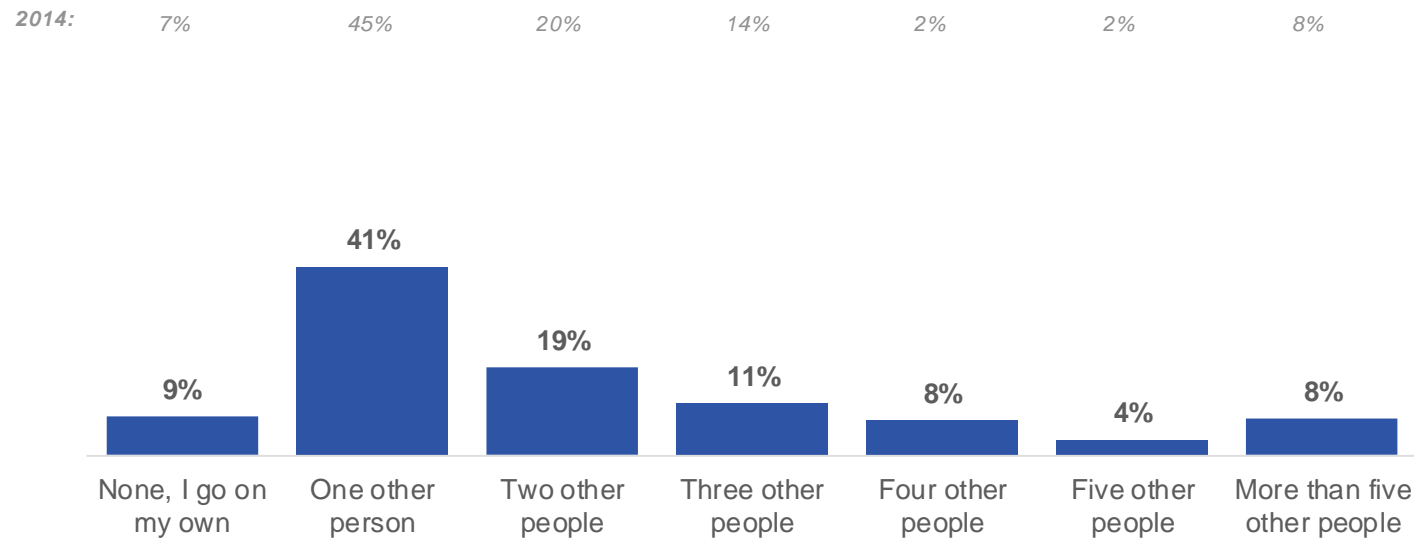


Base: Respondents who used their vessel in the last 12 months, n=1,717. Q16. And what was the usual trip duration?

The majority of boaters typically took at least one other person on the boat/vessel with them, only one in ten (9%) went alone

Usual number of individuals on board with master

Base: Respondents who used their vessel in the last 12 months, n=1,717.



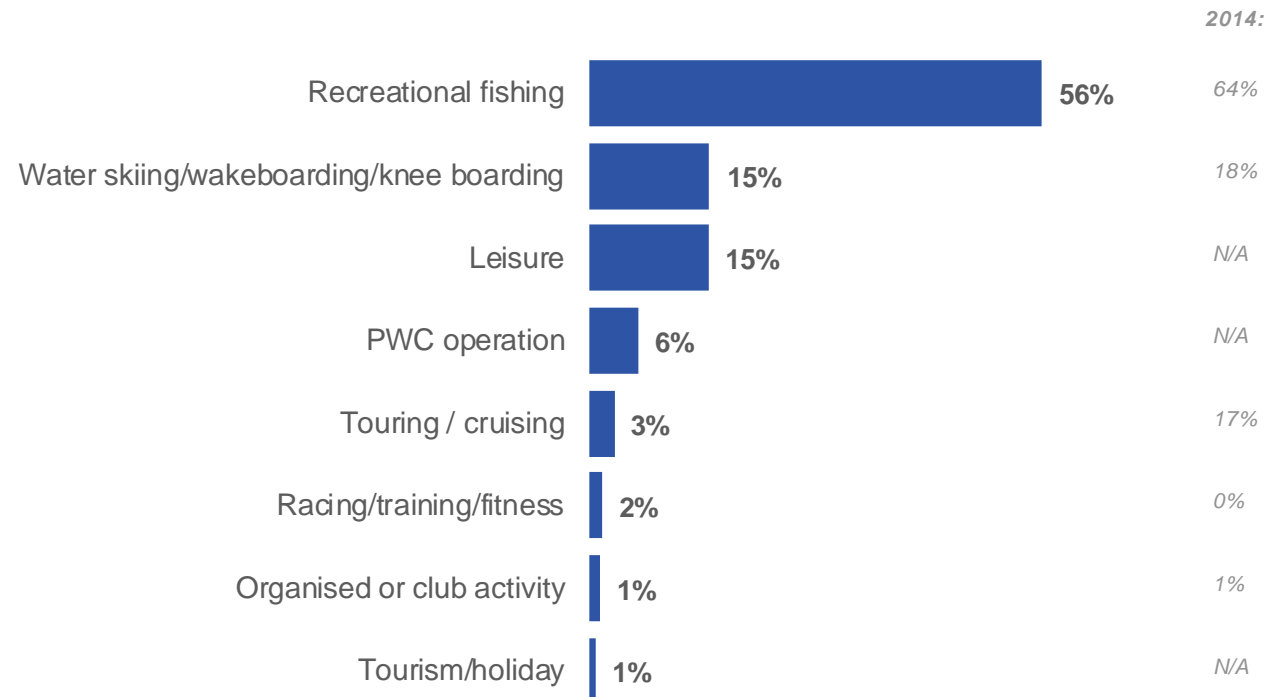
Average number of people on the boat: 3.1 people

Q7. In the last 12 months, how many people usually went boating/paddling with you?

Recreational fishing (56%), followed by water sports (15%) and leisure (15%) were the most common reasons for boating

Purpose for boating/paddling

Base: Respondents who used their vessel in the last 12 months, n=1,717.

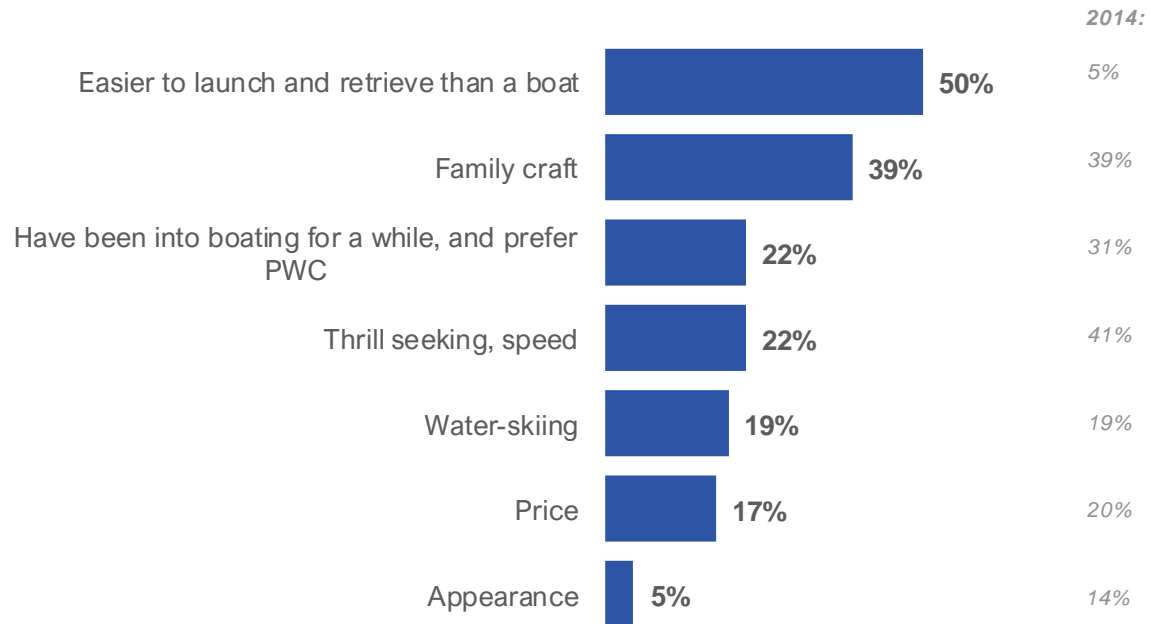


Q6. What was your usual purpose for boating/paddling in the last 12 months?

The main driver to PWC use was ease of launching and retrieving; two in five felt it is a family craft

Reasons for PWC usage

Base: PWC owners/users, n=108.



Q29. What attracted you to PWC riding?

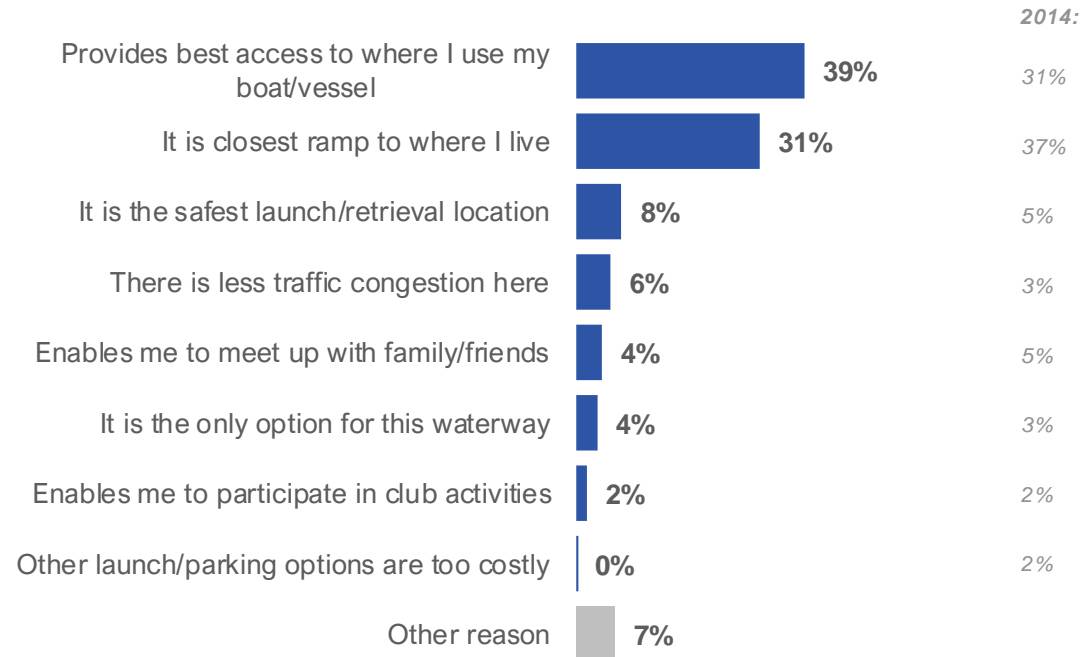
Proximity to vessel/boat storage (39%) and home (31%) were the main factors considered when choosing where to launch



90%
of boat/vessel
owners stored their
boat out of the water
(excluding dry storage)



Reasons for choice of launch location



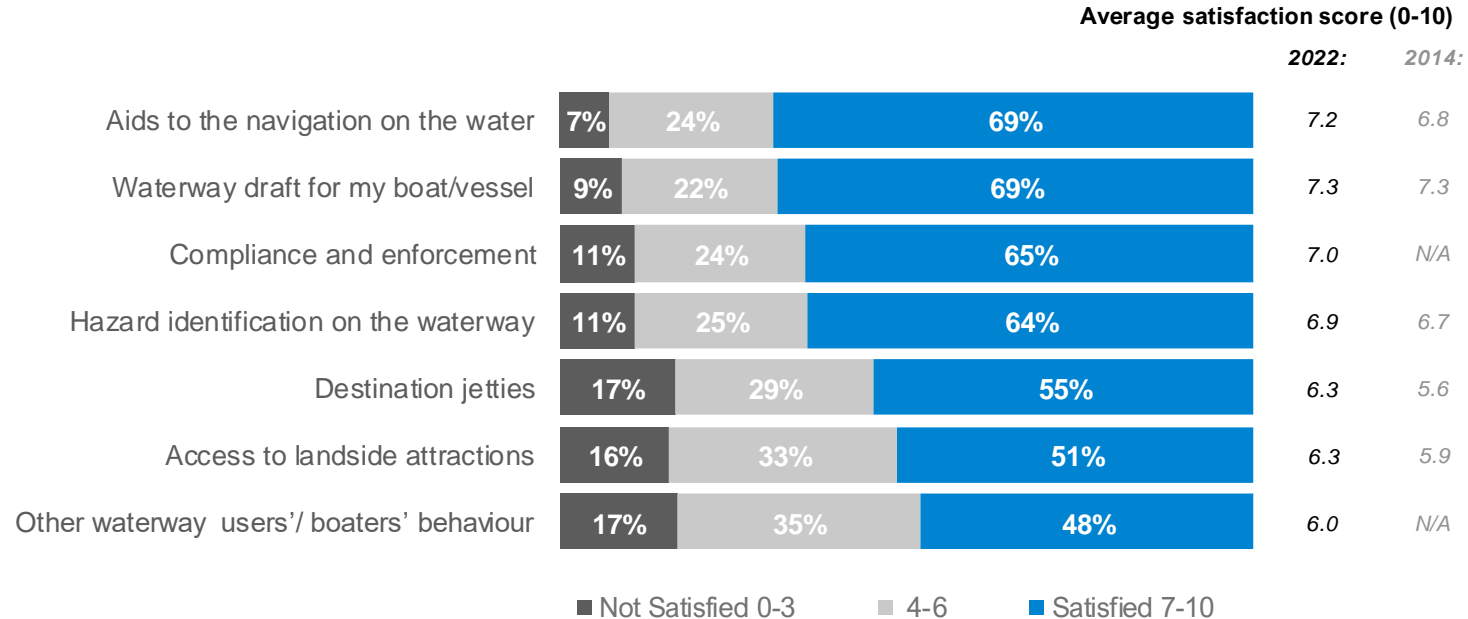
Q10. Why do you usually launch there?

Base: Respondents who used their vessel in the last 12 months and boat stored out of the water, n=1,428.

Seven in ten boaters were satisfied with navigation aids (69%) and the waterway drafts (69%)

Satisfaction with boating experience

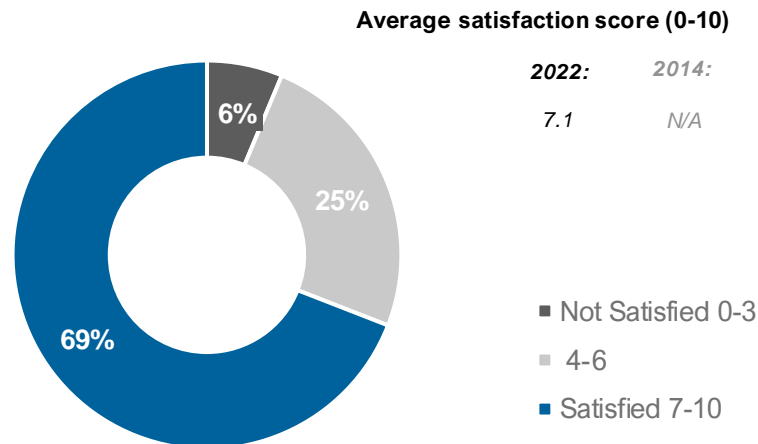
Base: Boaters who used their vessel in the last 12 months, n=1,714.



Q.18. For this question, we would like to ask your satisfaction with a number of areas relating to your boating experience on Victorian waterways. 'Don't know/not applicable' removed.

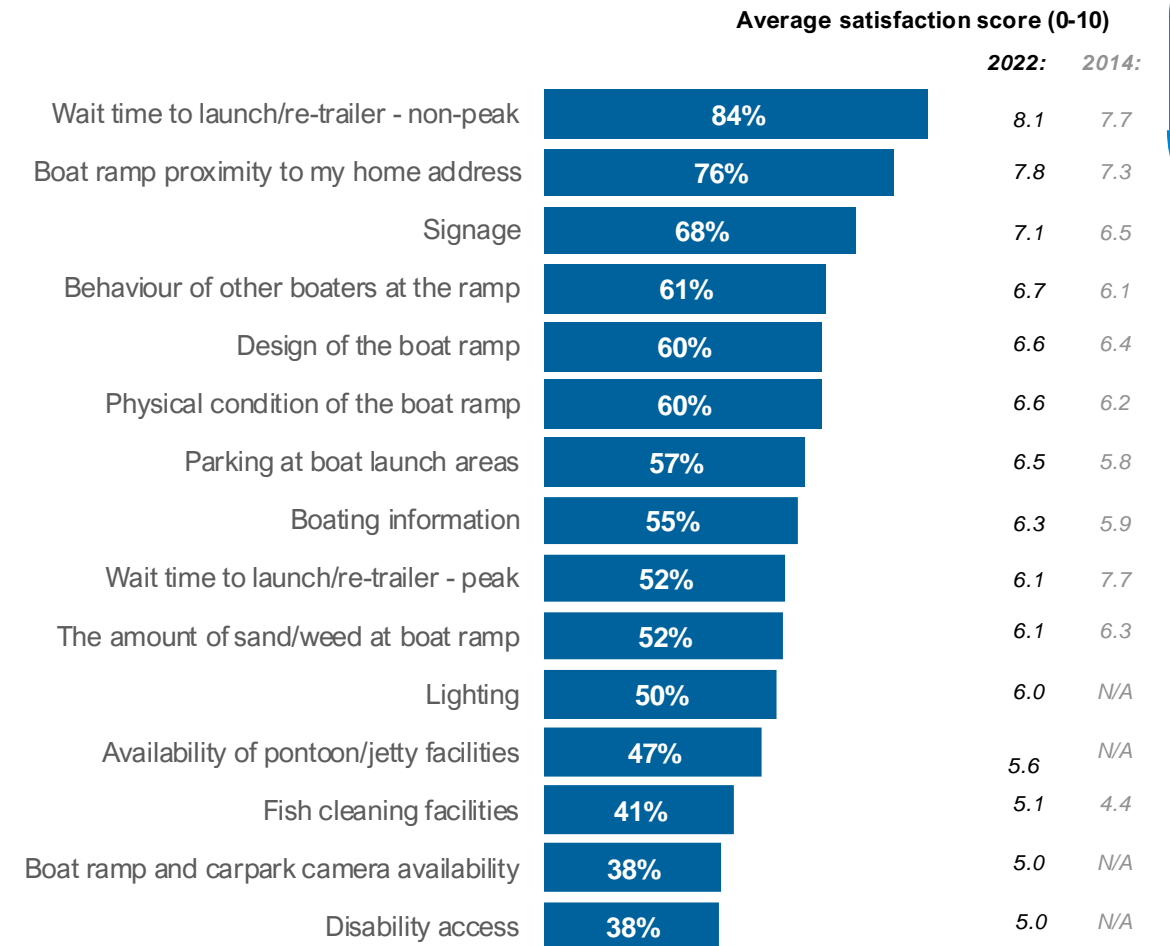
Seven in ten boaters were satisfied with their overall experience, where satisfaction was highest with the wait time to launch/re-trailer in non-peak periods

Satisfaction with overall boating experience



% Satisfied with aspects of boating experience (7-10)

Base: Boaters who used their vessel in the last 12 months and launch from a ramp, n=1,428.

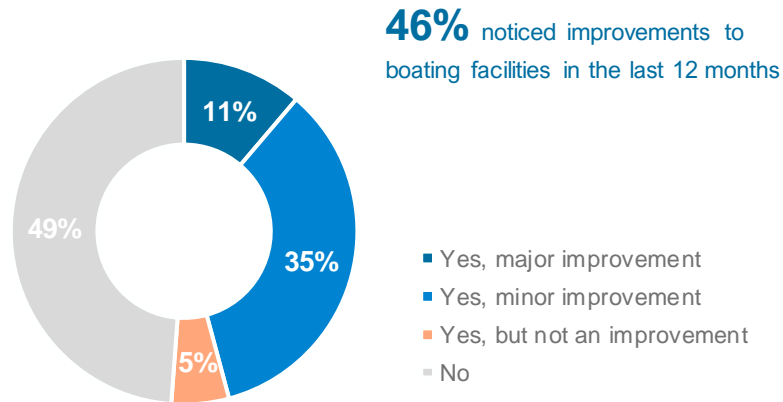


Q. 19. For this question, we would like to ask about your satisfaction with a number of areas relating to your experience getting onto the water within Victoria. 'Don't know/not applicable' removed.

Almost half noticed improvements to facilities over the year; improved launch/retrieval facilities and more parking should be a main focus of further improvements

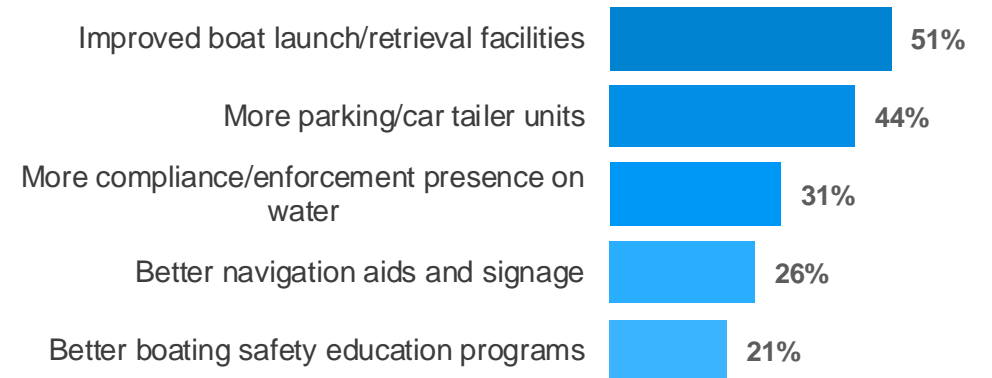


Changes to boating facilities noticed



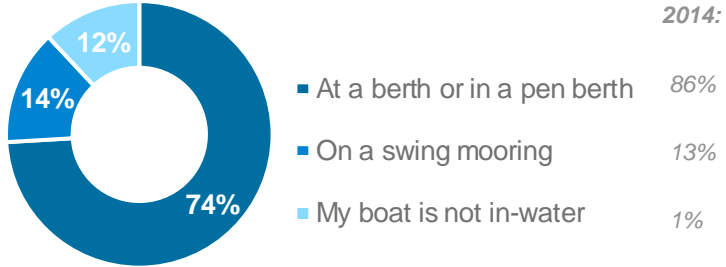
Base: Boaters who used their vessel in the last 12 months, n=1,714. Q.27.a. Have you noticed any changes to boating facilities over the last 12 months?

Top five key areas of focus for boaters when it came to improving waterways or boat launch locations

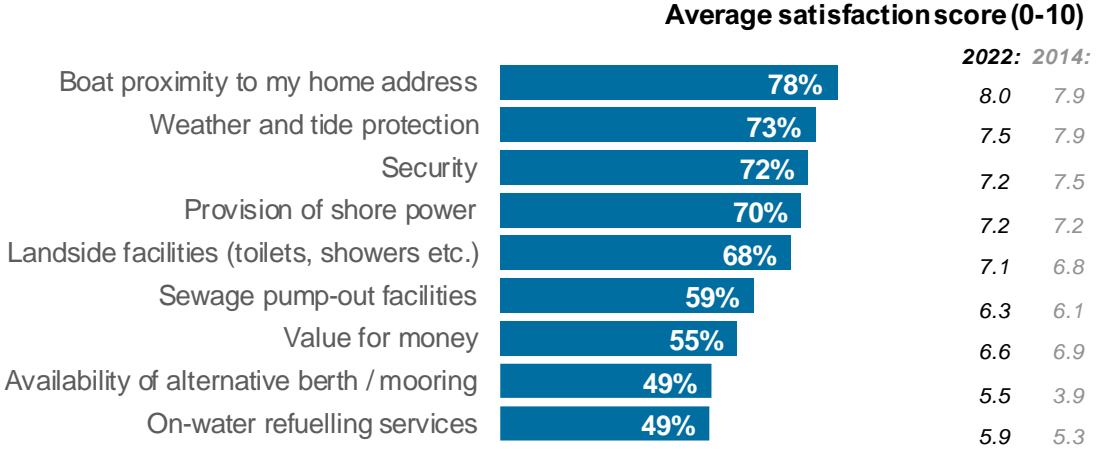


Base: Boaters who used their vessel in the last 12 months, n=1,714. Q.23. What things would you like to see improved across Victoria's waterways or boat launch locations in regards to recreational boating?

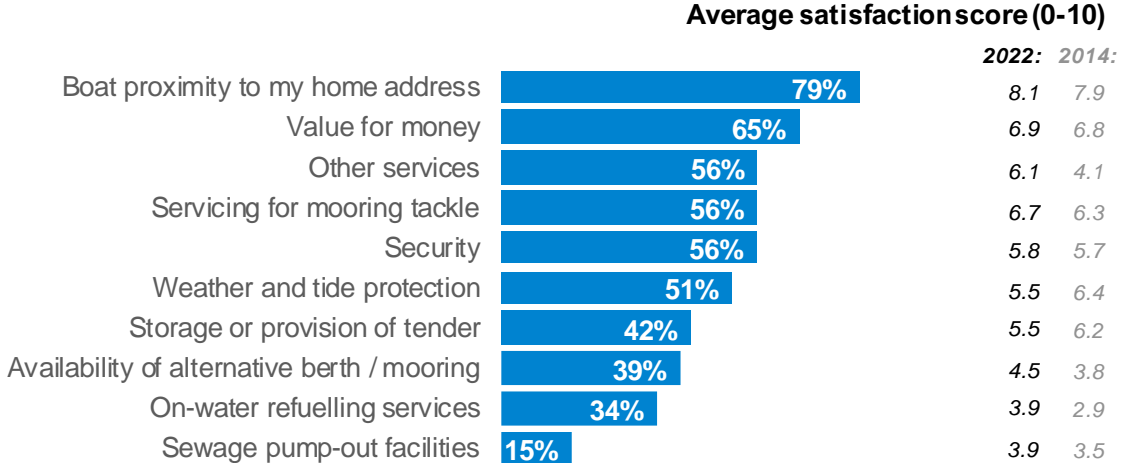
Proximity to home was the most common area of satisfaction with boat containment arrangements



Satisfaction with aspects of berthing arrangements (Scored 7-10)



Satisfaction with aspects of mooring arrangements* (Scored 7-10)



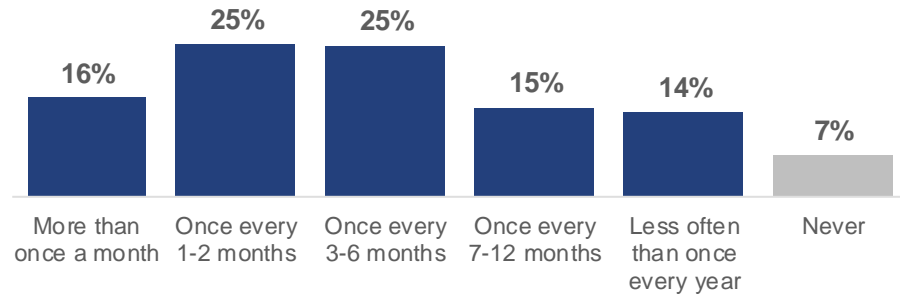
Base: Respondents who used their vessel in the last 12 months and boat contained in a marina, jetty or swing mooring, n=203. Boat contained in a berth, n=161. Boat contained on a swing mooring, n=25* *caution low base size*
 Q.25. Is your boat contained within a berth or moored? Q.26. How satisfied are you with your current berthing arrangements? Q27. How satisfied are you with your mooring arrangements?

Over nine in ten boaters (93%) visited multiple boating areas, 41% at least once every two months

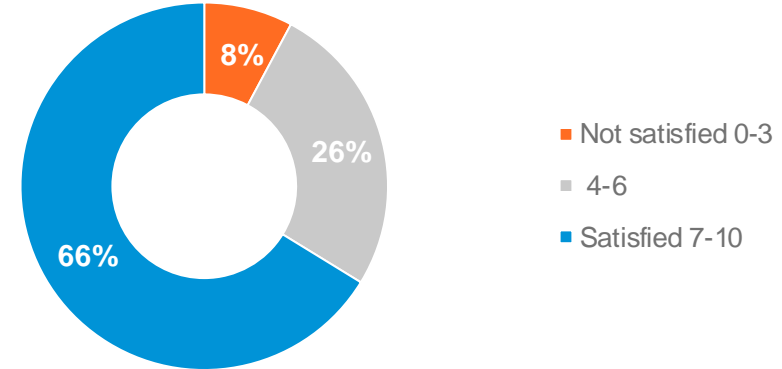
Usage of, and satisfaction with, other boating destinations or ramps

Base: Boaters who used their vessel in the last 12 months and launch from a ramp, n=1,428. Boaters who have visited another boating location, n=1,258.

Frequency of visitation to other boating areas



Satisfaction with facilities at other boating areas



Q19a. How often do you visit other boating districts or boating destinations or boat ramps?

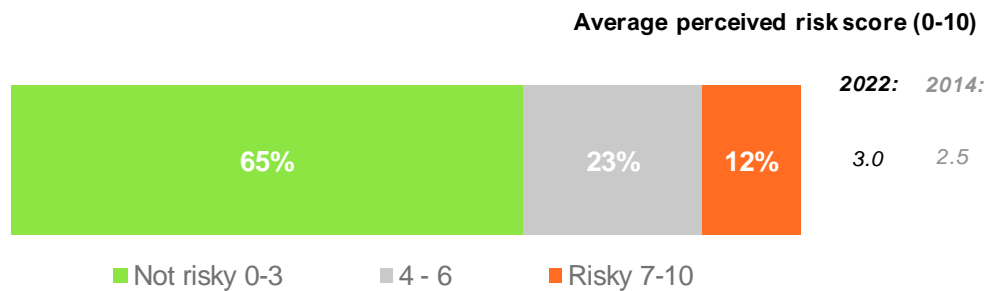
Q19b. How satisfied are you with the facilities at other boating districts or boating destinations or other boat ramps?

12% of boaters perceived boating to be risky; equipment failure/loss and sudden weather changes greatest perceived risks

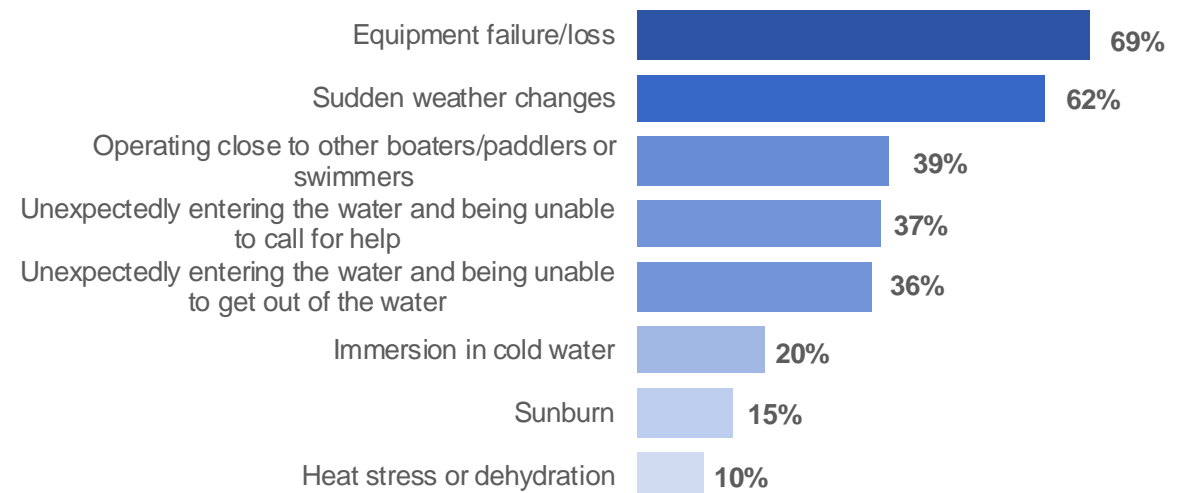
Perceived risks

Base: Respondents who used their vessel in the last 12 months, n=1,717.

Perceived riskiness of boating activity



% Ranked top 3 greatest risk associated with boating/paddling



Q.30. Considering your usual boating/paddling trip in the last 12 months, how risky do you feel this activity is for you? 'Don't know' removed.

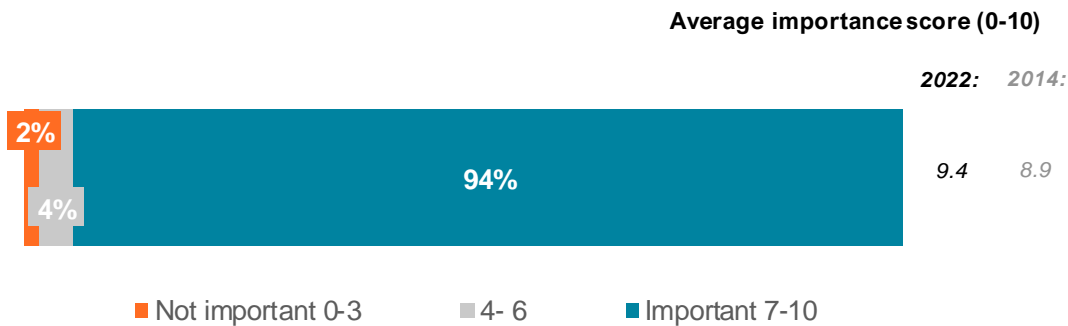
Q.32.a Which of the following do you see as the greatest risks associated with boating/paddling? Please rank the top 3 risks.

Almost all boaters (94%) perceived having all necessary safety equipment as important

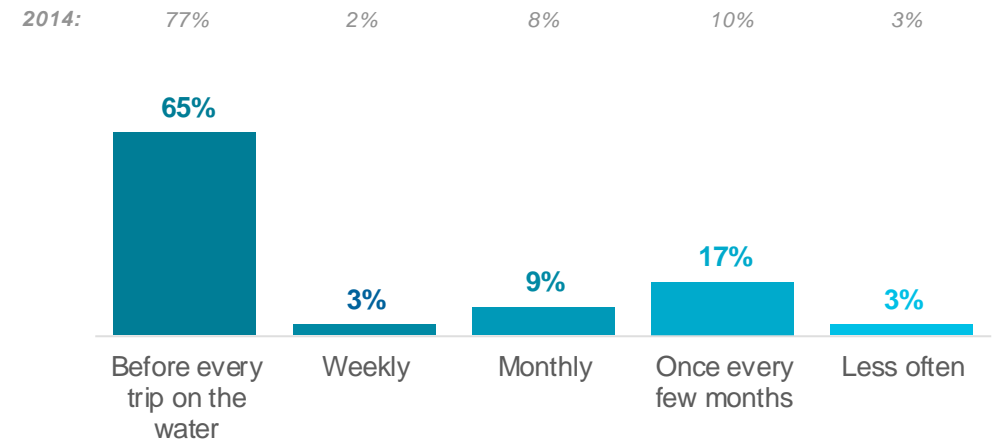
Safety preparation attitudes and behaviours

Base: Respondents who used a boat in the last 12 months, n=1,717

Perceived importance of having all the necessary safety equipment for the boat/vessel



Frequency of safety checks



Q.32. Considering your usual trip, how important do you feel it is to you to have all the necessary safety equipment for the boat/vessel?

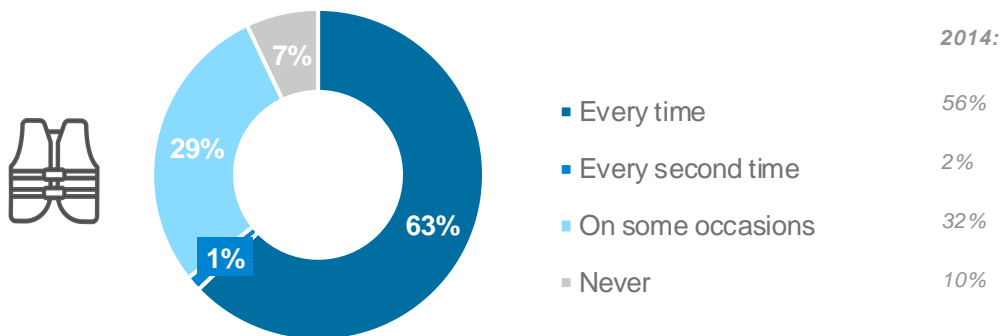
Q.31. How often do you check the safety equipment on your boat/vessel? Mumbrella AusNOW PRJ

Just under two in three (63%) indicated they personally wore a lifejacket every time they went out on the water

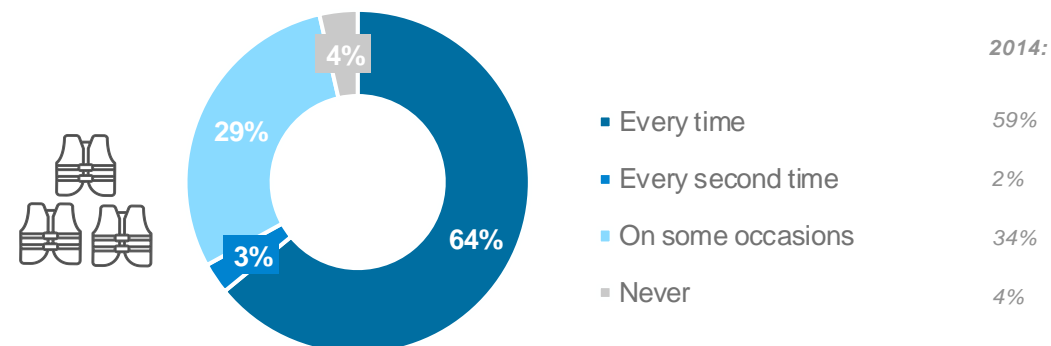
Lifejacket usage

Base: Respondents who used their vessel in the last 12 months, n=1,717.

Personal lifejacket usage



Life jacket usage by others on boat



Q.33. When you go boating/ paddling, how often would you personally wear a lifejacket?

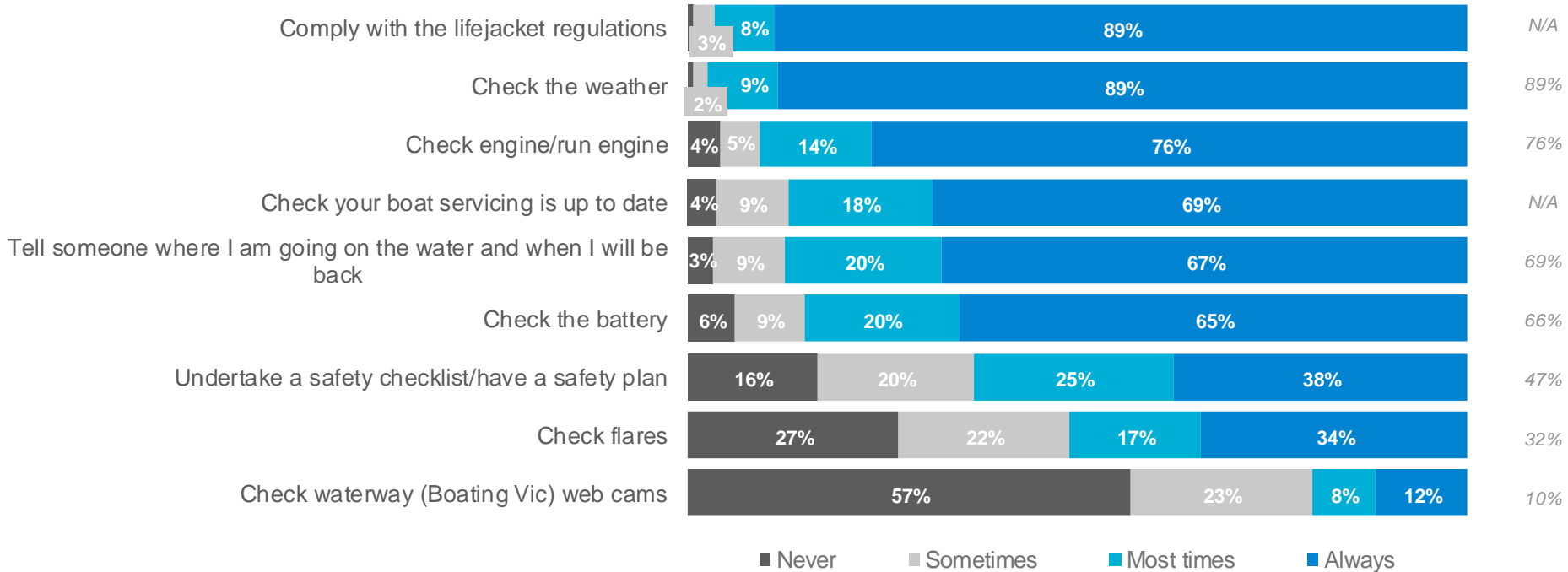
Q.34. Not thinking of yourself, how often would someone on your boat/vessel wear a lifejacket you carry?

Nine in ten boaters (89%) indicated they always checked the weather and complied with lifejacket regulations before going out

Undertaking of safety behaviour

Base: Respondents who used their vessel in the last 12 months, n=1,717.

2014 % Always

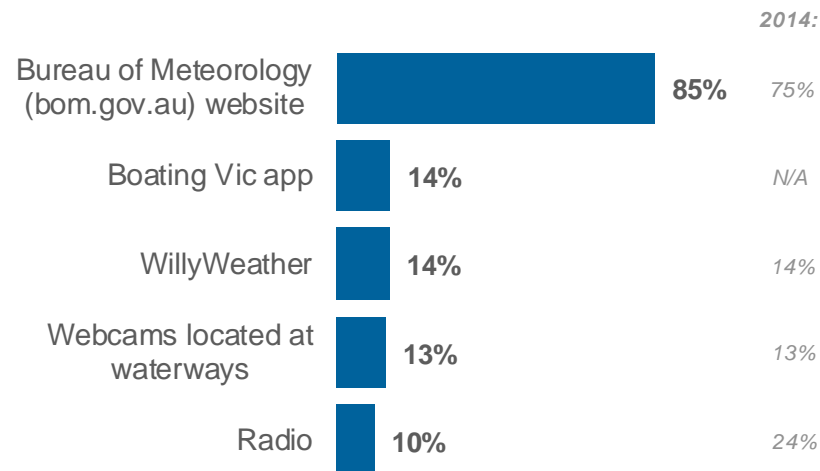


Q.35. How often do you undertake the following activities before going out on the water? NOTE: Values <1% not shown.

One in seven (14%) used the Boating Vic app to check the weather and one in five (20%) used it for safety and launching

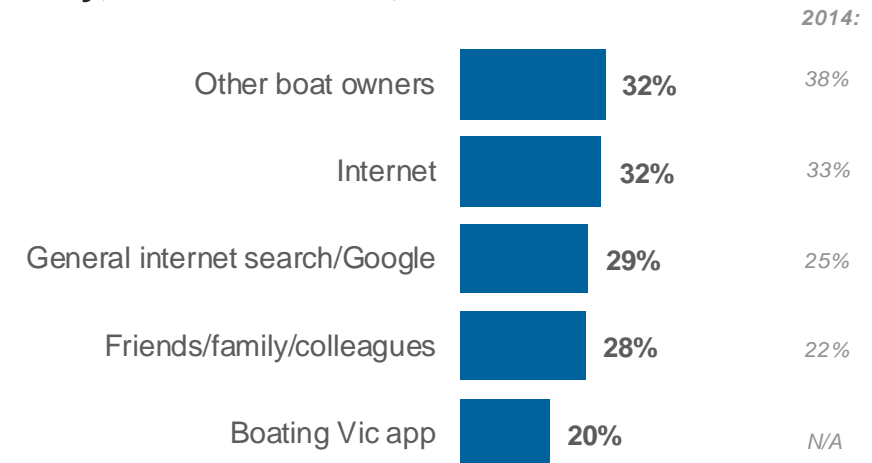
Information sources

Top 5 sources used to check the weather



Base: Respondents who check the weather at least sometimes, n=1,671.
Q.36. How do you check the weather before heading out on the water? Values <1% not shown

Top 5 sources used to obtain information on boating safety, areas to launch, etc.



Base: Respondents who used their vessel in the last 12 months, n=1,717.
Q.37. Where do you get your information on boating/paddling safety, areas to launch, etc.?



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