

NATIONAL RECREATIONAL BOATING STATEMENT

August 2025



Boating Industry Association



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1. PURPOSE

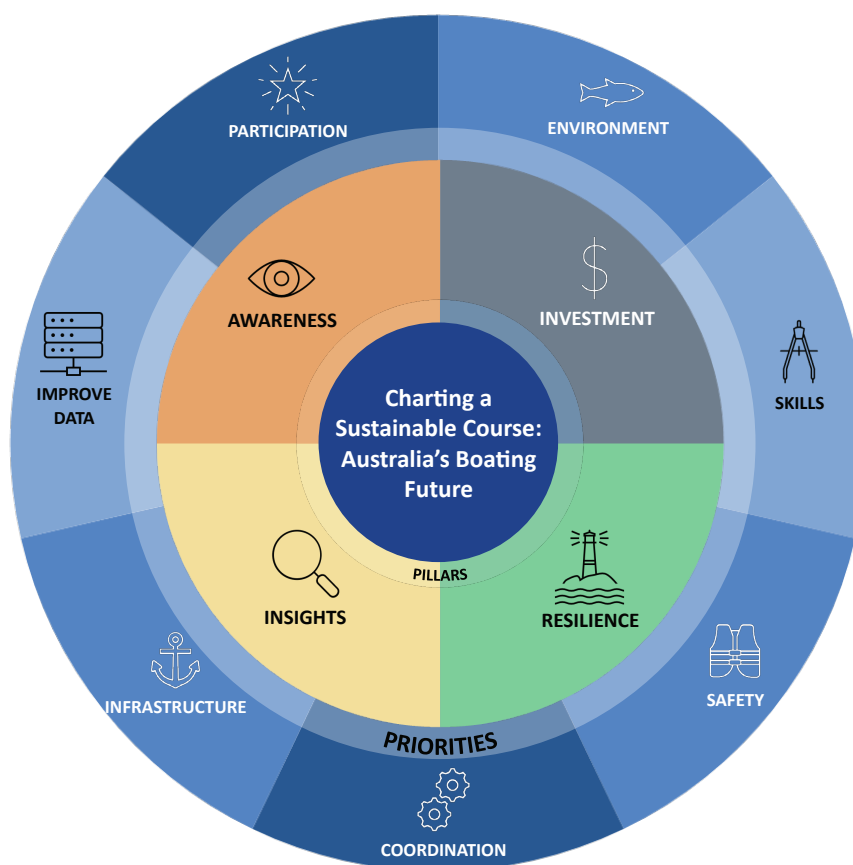
Over the years various State and local governments have produced boating strategies and plans recognising the significance of recreational boating activities, primarily based on licence and registration data.

These documents have informed policy and investment decisions, focusing on local and regional outcomes. Until now, there has never been a coordinated nationwide report examining the social, and economic impact of recreational boating in Australian society.

The National Recreational Boating Statement seeks to address this gap. It emphasises the need for consistent and robust analysis of the economic, environmental, technological and social trends driving changes in the sector.

The Boating Industry Association Ltd (BIA), Australia's peak marine industry body¹, engaged all State governments to help inform development of the Statement.

The Statement presents a shared vision of recreational boating which is built on four pillars to be achieved through seven priorities for government, business and community to consider, work together and make informed, sustainable decisions contributing to Australia's economic and social wellbeing.



1. The BIA is Australia's peak marine industry body. Representing almost 700 member organisations, BIA's membership base encompasses the entire marine industry, including designers, manufacturers, importers, brokers, insurers, retailers, charter operators, yacht and boat clubs, marinas, events, surveyors, and various trades from boat builders to riggers.

2. RECREATIONAL BOATING IN AUSTRALIA TODAY

What is recreational boating?



A key objective of the Statement is to establish and promote a clear, consistent definition of recreational boating. The intent is to ensure all stakeholders and the public share a common understanding of the activities which comprise recreational boating in Australia. The lack of a universal definition has led to confusion and misconceptions about recreational boating's role and significance in Australian society.

While various sectors, including Transport, Sport, Tourism and Recreational Fishing, have conducted studies and developed strategies which have touched on different aspects of recreational boating, there has never been a comprehensive analysis of the sector's overall scale and impact.

Various statutory definitions exist across different jurisdictions and keeping pace with ongoing innovations in products and service offerings is a challenge for law and policymakers. Rather than taking a prescriptive approach requiring regular updating, the BIA uses an inclusive definition of recreational boating.

'All forms of recreational activity using paddle, power and sailing vessels.'

This definition encompasses all activities typically associated with water-based recreation using non-powered, powered or sailing vessels. For the purpose of this definition, 'paddle' includes oared craft, and 'vessels' includes smaller craft such as personal watercraft (PWC) including the brands Seadoo, Yamaha and Kawasaki; sailing craft of all sizes down to sailboards and kiteboards; and paddle craft including kayaks, canoes and stand-up paddleboards which have become increasingly popular in recent years. Importantly it also includes Class 4 Domestic Commercial Vessels which are used for recreational purposes, without paid crew, such as bareboat charters, share economy boats, houseboats and other Hire-and-Drive craft.

Who participates in recreational boating?

Recent surveys indicate approximately one-in-five Australians participate in some form of recreational boating activity annually². The boating public spans all ages, genders, abilities, cultural backgrounds and budgets. However, no Australian jurisdiction maintains definitive data on the exact nature of this participation. This data gap exists largely due to the inherently accessible and spontaneous nature of recreational boating – participants generally don't need to buy a ticket, register their trips, or restrict themselves to defined routes or areas where activity can be easily recorded. In addition, many vessels including paddle and small sailing craft, do not require registration, and participants do not need a licence to operate.

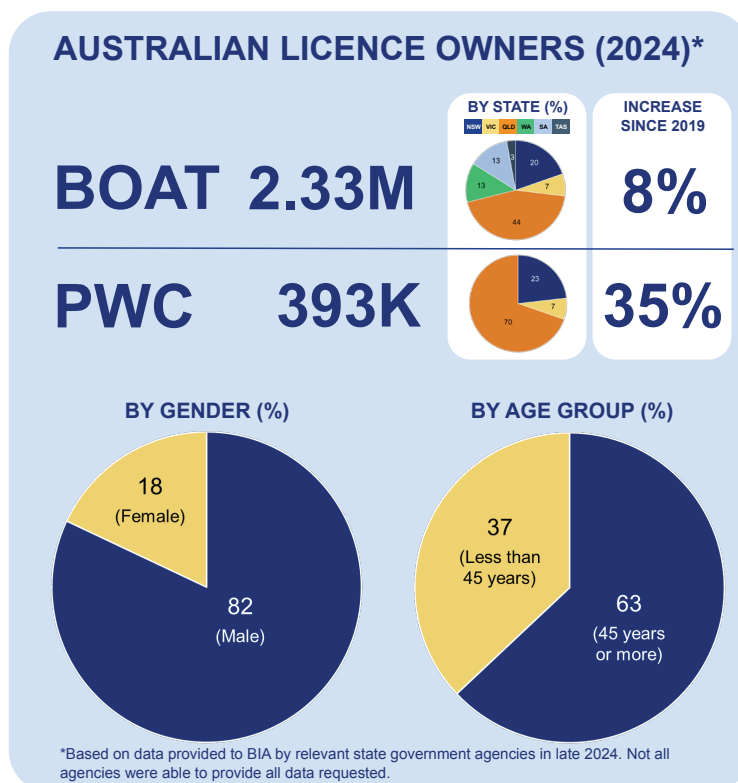
Traditionally, State governments have relied on data generated from mandatory registrations and operator licencing on powered vessels of a certain horsepower and/ or capable of operating above a certain speed. Such data however provides little insight to actual boating usage.

To support the development of the National Recreational Boating Statement, the BIA asked all State governments to provide five years of de-identified licencing and registration data to help create a national repository for this information.

The data received revealed variations in the way governments collect and record licence, and registration information, creating challenges in determining national totals and identifying trends.

The variations include some States not providing historical data for the full past five years and different approaches to:

- categorising registered vessels
- licencing for PWC use
- categorising licence holders, including some States not collecting data on the age or gender of licence holders.



2. Taverner Research Group prepared for Transport for NSW, NSW Recreational Boater Survey 2023,

What are the habits of Australian boaters?

Until now, there has been little examination into the habits of Australian boaters, with vessel registration data held by State governments providing the main means of trying to understand the nature of boating trips. The limitations of the government data reported to BIA suggests there are at least 902,000 registered vessels. Other recent estimates produced by BIA with insights gained from independent* data intelligence suggest a national total of around 950,000³.

While vessel registration data can be helpful in tracking broad ownership trends, it does not capture crucial information on:

- vessels and craft that do not require registration or a licence to operate;
- frequency of boating activities;
- destinations and routes;
- number of people per trip;
- types of activities undertaken on the water; or
- annual expenditure on recreational boating and its economic flow-on effects.

Some governments have attempted to fill these information gaps through customised surveys, such as the *NSW Recreational Boater Survey 2023* conducted by Transport for NSW. However, the considerable cost of such comprehensive surveys is limiting and few have been commissioned by State government departments.

Innovation in modern mobile communications technology, however, is now enabling the collection of real time data that provides new insights into recreational boating behaviour and activity in Australia.

The DECKEE boating app has emerged as a leading source of this information and is collecting valuable marine-specific geolocal and related data from across Australia while observing privacy requirements. For example, DECKEE is now able to produce reliable, de-identified data from its large volume of customers on key measures such as the duration of boating trips, start and finish locations, and the distance travelled on water.

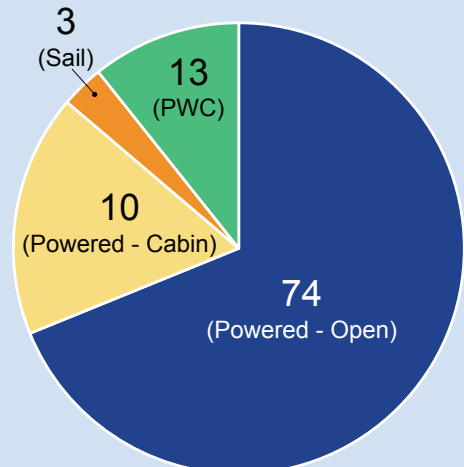
Further examples of the data now available through DECKEE and insights that it can generate to help regulators, asset owners, policy makers, industry and investors make more informed decisions are included on Pages 15 & 16.

To further inform the Statement's development, the BIA conducted the first National Recreational Boating Survey in October and November 2024. A total of 1,421 survey responses provided insights into the habits of recreational boaters in Australia. Results of the survey are profiled on the next page.

AUSTRALIAN VESSEL REGISTRATIONS (2024)

900K+

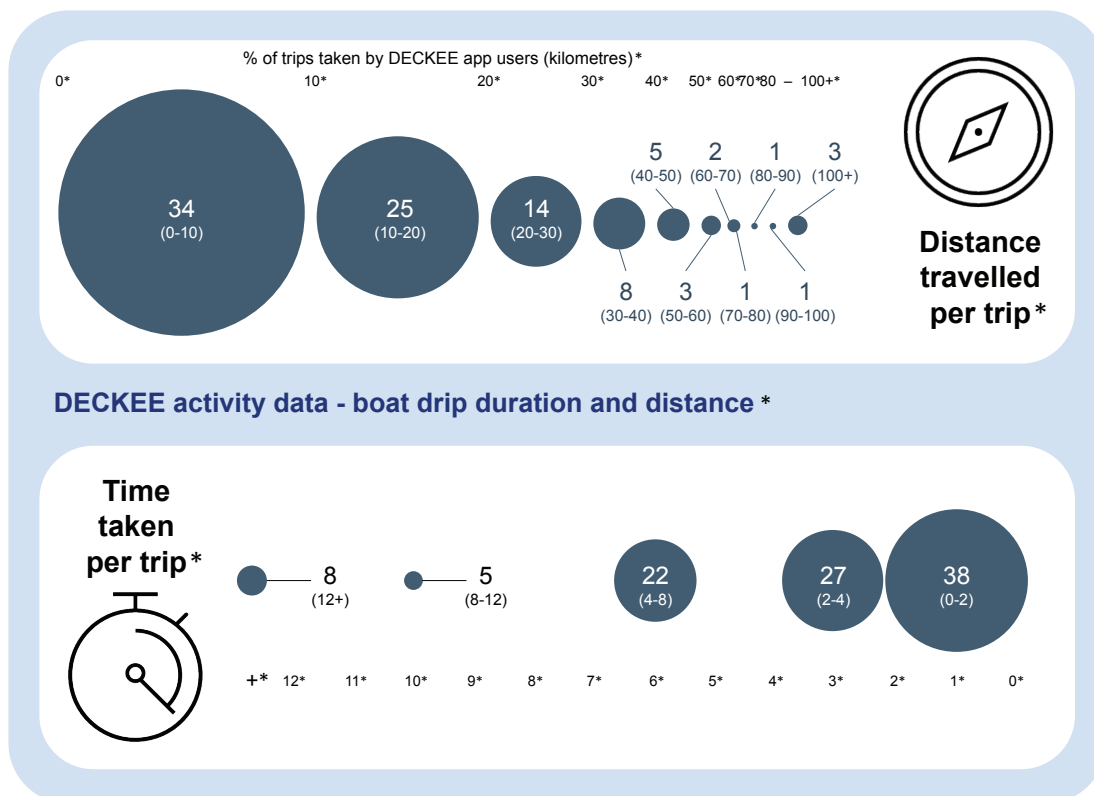
BY CATEGORY (%)



PWC growth since FY20

28%

Based on data provided to BIA by relevant state government agencies in late 2024. Not all agencies were able to provide all data requested



Recreational boating's role in Australian culture

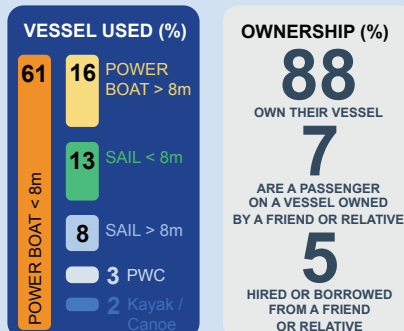
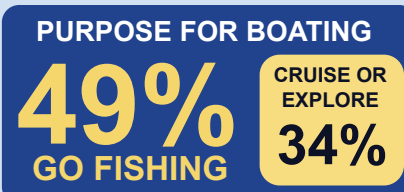
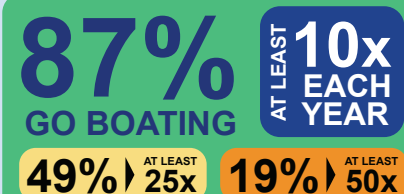
As an island nation with a coastline stretching more than 35,000 kilometres⁴ and 85 per cent of the population living within 50 kilometres of the coast⁵, it is little wonder that the Nation has a passion of all forms of recreation on, in, under and by the water.

Boating in Australia has a connection with the Aboriginal people of this land who were using watercraft such as bark canoes as far back as 8,000 years ago⁶. Just like today, our waterways back then played an important role in transport, exploration and food gathering.

As a Nation that so often ties its sense of identity to its exploits in the sporting arena, boating is also a major anchor of Australia's sporting culture. Traditional boating participation measures fail to capture the hundreds of thousands of people involved in competitive and social sporting events. These activities range from young people participating in sailing and rowing activities as part of their school sport curriculum, to weekend club races and regattas, and major events such as the world-renowned Sydney to Hobart yacht race.

1. Geoscience Australia <https://www.ga.gov.au/home>
2. <https://www.abs.gov.au/Ausstats/abs@.nsf/Previousproducts/1301.0Feature%20Article32004>
3. <https://australianmuseum.net.au/blog/science/tentative-chronology-of-indigenous-canoes-of-eastern-australia/>

National Recreational Boating Survey (2024)



NOTE: These responses highlight the shortcoming of relying solely on state registration data, which does not capture non-powered vessels.

Since the first Olympic Games in 1896, boating disciplines - Sailing, Rowing and Canoeing/ Kayaking – now rank among the top six medal-winning sports for Australian athletes. Combined, these boating sports have earned Australia more Olympic medals than any other sport except for swimming.

Australia's boating excellence extends beyond Olympic competition. The nation has produced many elite and world champion athletes, including those who compete in other popular boat-based sports such as tow-sports, which attract thousands of participants, support crew and spectators to major events held around the country throughout the year.

When it comes to aquatic recreation, for many Australians, boating goes hand-in-hand with one of the nation's other favourite pastimes - fishing.

Almost half of all respondents to BIA's National Recreational Boating Survey 2024 identified fishing as the primary purpose of their typical boating trip. Data from the Australian government's *National Social and Economic Survey of Recreational Fishers 2018-2021* reveals that 4.2 million Australians participate in recreational fishing each year, generating more than 100,000 jobs and contributing \$11 billion annually to the national economy.

The survey found that recreational fishers engage in:

- Combined shore and boat-based fishing in the previous 12 months (58.8%)
- Shore-based fishing only (26.4%)
- Boat-based fishing only (14.8%)⁷.

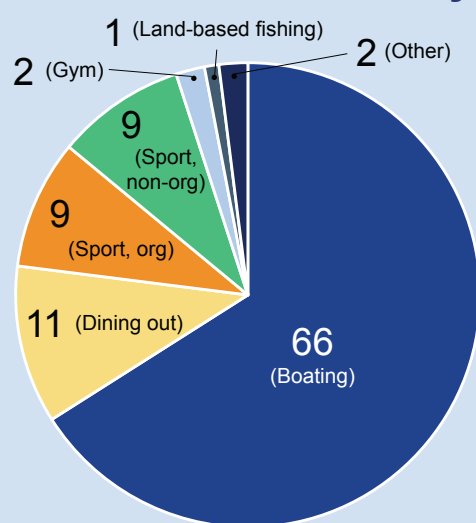
These findings indicate that nearly three-quarters of Australia's 4.2 million recreational fishers are also recreational boaters.

BIA's National Recreational Boating Survey 2024 asked respondents to rank their participation in recreational boating against a range of other popular recreational activities in Australia, including:

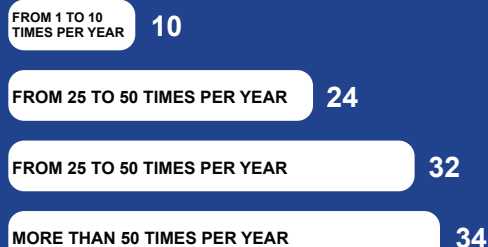
- Time out at a café/restaurant/bar with friends and family
- Land based non-organised sports, including going for a run or walk
- Other regular organised social activity
- Land based fishing
- Land based organised sport
- Going to the gym

Not surprisingly for a survey distributed through boating networks, 66% of respondents ranked boating as their favourite recreational activity, with a strong correlation between those who ranked boating as their favourite recreational activity and those who reported going boating more frequently. However, even among more occasional boaters – those that reported going boating between 10 and 25 times a year – 24% ranked boating as their favourite recreational activity.

Boating ranked first as a recreational activity^A



FREQUENCY OF BOATING AMONG PEOPLE RANKING THE ACTIVITY AS #1 (%)



NOTES

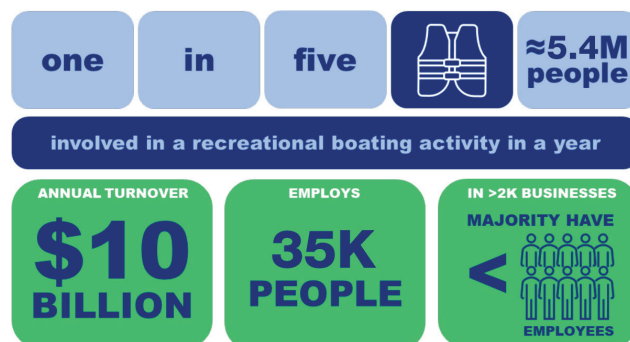
A. Response to the BIA's National Recreational Boating Survey (2024)

7. Moore, A, Schirmer, J, Magnusson, A, Keller, K, Hinten, G, Galeano, D, Woodhams, J, Wright, D, Maloney, L, FRDC, ABARES, UC, National Social and Economic Survey of Recreational Fishers 2018-2021, February. CC BY 3.0

The Blue Economy of recreational boating

According to the BIA's annual member survey, the boating industry generates more than \$10 billion in direct annual turnover from the 'Blue Economy'. The sector includes more than 2,000 businesses nationwide, employing more than 35,000 people, with the majority being small businesses with fewer than 10 employees.

Almost all government bodies have yet to fully examine the broader economic contribution of recreational boating, including its employment, investment and consumer expenditure flow-on effects. This gap in understanding stems primarily from inconsistent data collection and challenges in compiling and integrating various regulatory databases for analysis. Boating data collected by State maritime regulators generally offers little to no insight into employment and jobs which is a critical issue for all State and Federal governments.



'the boating industry generates more than \$10B in turnover'

In addition, insufficient investment in research and analysis, hinders our understanding of recreational boating's economic and social value, as well as the factors influencing its growth and sustainability.

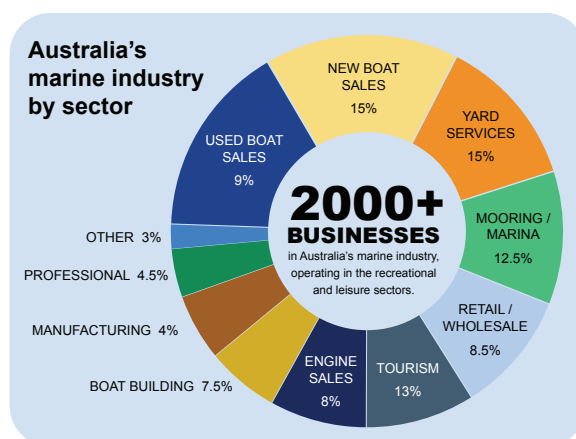
The BIA's National Recreational Boating Survey 2024 examined respondents' yearly expenditure on boating activities. While not intended as a comprehensive analysis into the economic value of recreational boating, the survey shows how expenditure on boating flows through the broader economy.

The survey results suggest an average spend of around \$14,000 per annum for an individual boater. However, it is recognised that expenditure varies greatly – with high costs by a small number of respondents (large vessels) skewing the average for items like *Maintenance and upkeep*, *Cost of boat, engine or major equipment*, *boat storage costs*, and *fuel*.

Future updates to this Statement should delve deeper into spending habits with greater segmentation by vessel size.

It is worth noting the comprehensive NSW Recreational Boater Survey 2023 suggested there is at least one unregistered vessel or watercraft user for every registered vessel user. Based upon this information, BIA recommends further work needs to be done to better understand the combined expenditure on boating related activities for both registered vessels/ craft and those that are not required to be registered. However, based upon known data and research it is estimated the public spend \$15B per year getting out on the waterways when recreational boating and watercraft activities are combined in the 'Blue Economy'.

'the public spend \$15B per year getting out on the waterways'



	AVERAGE (\$)
Yearly expenses	
Maintenance and upkeep	3,392
Registration fees	476
Club membership fees	284
Clothing (non-safety)	251
Safety equipment	271
Cost of boat, engine or major equipment	5,211
Operator licence fee	75
Boat storage costs	2,427
Yearly trip expenses (based on 1 trip per month)	
Fuel (including to/from in car)	2,220
Food and drink	864
Bait and tackle	384
Other expenses	780
TOTAL	\$14,535

Social benefits of boating

Research conducted nationally and internationally has extensively documented the social and wellbeing benefits of water-based activities. Marine biologist, the late Dr Wallace J. Nicholls, founder of the Blue Mind movement, demonstrated that even the sight and sound of water promotes wellness by lowering stress hormones, increasing feel-good hormones and inducing relaxation.

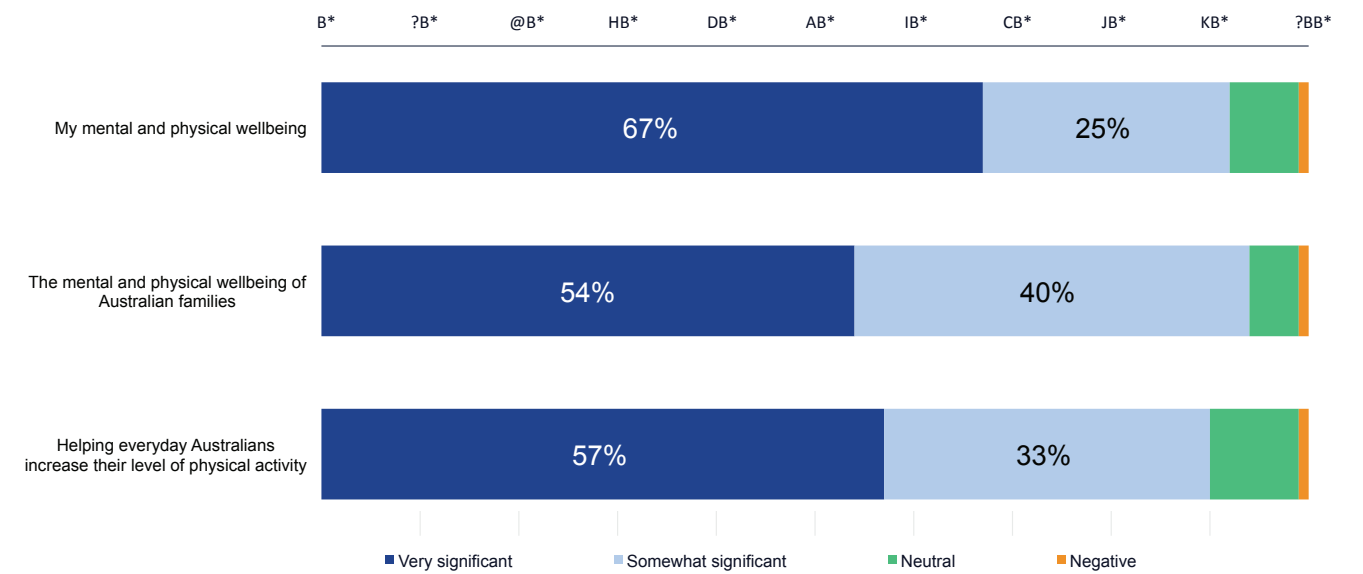
‘more than 90% believed recreational boating had significant positive influence’

A BIA survey of attendees at the 2024 Sydney International Boat Show which attracted 42,000 attendees supports this connection between boating and wellbeing, with 73% of respondents agreeing or strongly agreeing that the event promotes and educates a healthy lifestyle through boating. When asked about the significant influence of recreational boating on the mental and physical wellbeing on themselves, their families and everyday Australians, attendees were emphatic. Of the respondents, more than 90% believed recreational boating had significant positive influence on mental and physical wellbeing.



It is also worth noting the striking parallel that exists between the world’s happiest countries and those with the highest rates of recreational boating. Many of the nations that consistently top the World Happiness Report rankings, such as Finland, Denmark and Norway, are also known for their strong boating cultures. This isn’t a mere coincidence; it’s a reflection of the shared values and conditions that contribute to both national happiness and the widespread enjoyment of water activities. These countries often boast a combination of factors that support both: high GDP per capita and strong social support systems, which provide the economic stability and leisure time necessary for boat ownership and participation. Furthermore, these nations are blessed with extensive coastlines, lakes, and rivers, making it easy for citizens to access and enjoy the water.

BIA survey of 2024 Sydney International Boat Show attendees – Influence of recreational boating on mental and physical wellbeing



Role of governments

Despite recreational boating being an important and healthy part of the lives of millions of Australians, the sector still has some way to go to achieve a more complete recognition of its social and economic value from governments.

No agency or Minister holds defined responsibility for recreational boating at the national level. At the State and Territory level, some jurisdictions have operated standalone maritime agencies with dedicated legislative and policy frameworks and, in some cases, with specific boating-related Ministerial portfolios.

However, the current approach by most jurisdictions views boating as a form of transportation, with government efforts predominately focused on ensuring safe boating with little strategic recognition of the social, recreational and economic benefits.

Safety

The regulatory approach to boating safety mirrors other transportation sectors; focusing on vessel and equipment standards, and operator licencing to ensure vessels are designed and constructed to a recognised standard and equipped with at least the minimum required safety equipment and skippered by people with the knowledge and experience required to operate in waterways safely.

State agencies are responsible for setting and applying rules around safe navigation of vessels on waterways, including laws that apply statewide and rules that are specific to the risks faced by operating in certain locations and/ or waterways.



Safety is the only issue within the sector where relevant State and Territory agencies formally collaborate and share knowledge at the national level through the National Recreational Boating Safety Committee (ARBSC). Comprising senior officers from State and Territory agencies and the Australian Maritime Safety Authority, the committee meets at least twice annually to:

- Identify and respond to nationally significant boating safety issues
- Promote uniform approaches to boating safety standards, policies, procedures, regulations and safety campaigns
- Monitor national and international boating safety developments
- Consider issues arising from Coronial investigations
- Oversee the Australia New Zealand Boating Education Group's annual work plan⁸.

Ensuring the safety of all boaters should of course be the number one priority for governments. However, the tendency to primarily view boating policy issues through the lens of transport safety, understates the important role that other parts of government have in supporting a thriving boating and outdoor recreation sector.

8. <https://www.anzsbeg.com.au/about-arbcs-2> <https://www.anzsbeg.com.au/about-arbcs-2>

Infrastructure provision

A safe and enjoyable day on the water begins and ends with the use of some form of infrastructure at the land/water interface. Boat ramps, jetties, pontoons, marina berths, dry stack storage, moorings, boat club storage and ramps, and paddle craft launching facilities are all essential facilities to support safe and convenient access for people of all ages and abilities.

In many locations, boating activity also relies on the existence of major infrastructure such as breakwaters and training walls that provide a critical link between estuaries and the ocean, and create safe havens for marinas, boat clubs and other forms of boat storage and inshore boating activities.



Key management efforts like maintaining accessible navigational channels through regular dredging, installation and maintenance of navigation aids and providing ready access to responsible waste disposal facilities to receive waste from onboard holding tanks, are also key infrastructure considerations.

While infrastructure asset ownership models differ across States and Territories, larger enabling infrastructure is typically the responsibility of State and Territory governments. Local councils are generally responsible for smaller access infrastructure, usually located adjacent to public parks and foreshores.

Most State governments offer grant programs to support local councils and other infrastructure owners provide new and upgraded facilities to keep pace with growing demand.

Privately operated marinas have a crucial role in the recreational boating sector by offering boat storage, easy customer access to the water, repair and maintenance services and amenities for boaters and the public. As most marinas are on publicly owned land, the leasing and land management policies of the relevant land-holding agencies within State governments are also critically important.

The latest Health of the Australian Marina Industry report revealed that the 291 marina facilities nationally contribute \$2.24 billion to the economy, provide premises for over 2,600 small businesses and supports close to 22,000 jobs. The industry has performed well over recent years with average occupancies exceeding 86 percent.

Queensland is home to the largest marinas in the country, housing up to 320 boats at each facility and reporting the highest average turnover at \$3.4 million.

More than 80 per cent of marinas lease space to marine-related tenancies, most of which are small business operators who service boaters⁹.

State, Territory, and local planning and environmental frameworks significantly impact maritime infrastructure provision. The lack of a robust and nationally recognised evidence base on the social and environmental benefits of maritime infrastructure, combined with the tendency of regulators to base their policy and regulatory frameworks around the 'precautionary principle', often leads to proponents facing exhaustive and costly environmental impact assessment processes which in some cases ultimately prove to be prohibitive to investment plans.

9. Ocean Magazine, October 2024.

3. CHALLENGES AND OPPORTUNITIES

Broadening user diversity

Identifying national trends in the diversity of Australian boaters is constrained by the limited data available. However, recent data reported by Queensland and New South Wales shows encouraging signs of an increase in participation by females and younger generations.

This is perhaps being driven by macro-level trends in the sharing economy and technological innovations in the boat-hire sector, which have made it easier than ever for new boaters to get out on the water without the need to own their own boat.

GoBoat Australia (pictured) provides a prime example, with its range of low-speed, quiet electric propulsion picnic boats available for short-term hire on urban waterways in Sydney, Melbourne, Gold Coast and Canberra.



Continued growth in these types of service offerings, along with initiatives such as Try Sailing days successfully run by sailing clubs around the country, will play an important role in shifting demographics within the boating community by giving younger generations a taste of the boating life and providing an entry pathway to future boat ownership.

Baby Boomers – 1940-60

- Active 3rd age/ 'silver surfers'
- Semi-retired, early retirement
- Wealthier, fitter, living longer
- Retirement travel and experiences
- Grand children – important
- Family & friends – social time

Generation X – 1960-80

- Credit card & debt
- Status and assets – cars & houses
- Multiple mortgages
- Work hard/ play hard – do it all
- Extended families = time poor
- Health & well being
- Pushing back old age

Millennials/ Gen Y – 1980-95

- Student debt
- Rented accommodation
- Share or hire assets
- Pre-paid/ top up cards
- Digitally savvy consumers
- Experiences, festivals, travel
- Socially conscious
- Sustainable/ Eco conscious

Generation Z – post 1995

- Digital natives
- Social networks, multiple realities
- Apps, mobile
- 'Communaholic'
- Live at home longer
- Self-image, gender fluid
- Inclusive, ethical, unique

The BIA will also continue its key role in growing and broadening boating participation in Australia through its flagship programs and events. A survey of attendees at the 2024 Sydney International Boat Show Economic & Social Impact Report found that 73 per cent strongly agree or agree the event helps to promote participation in boating to people of all ages, genders, abilities, and budgets.

Increase in non-owning boaters

The COVID-19 Pandemic and associated mandatory lockdowns imposed by governments led to increased recreational boating activity worldwide, including in Australia, where all regulators reported significant increases in boat driver licences and vessel registrations. Major Gold Coast-based boat builder Telwater reported unprecedented orders for its iconic brands, Quintrex, Stacer, Save and Yellow Fin Boats. All of their dealers recorded the best sales growth the industry has ever seen, and Telwater had to significantly increase production to cater for this demand.



The popularity of boat rental, chartering, and boat-sharing models, also surged leading to an increase in 'non-owning boaters'. Advancements in digital technologies and smartphone applications are instrumental in revolutionising boat access, enabling innovative ownership models that make waterway experiences more accessible.

Emerging platforms now offer solutions that allow individuals to enjoy boating without traditional ownership barriers, including:

- Peer-to-peer boat rental
- Fractional ownership models
- Timeshare boat arrangements

These technology-driven models substantially reduce financial barriers by eliminating costs associated with boat purchase, maintenance, storage, and insurance.

Anecdotal evidence shows these models are particularly appealing to younger generations who prioritise experiences over asset ownership and value flexibility in recreational choices. Based on the limited data available, early indicators suggest these alternative boating models are attracting a more diverse demographic, including younger participants and women who might have been traditionally excluded from accessing or owning a boat.

The share economy has truly made waves in the boating world, offering a compelling alternative to traditional boat ownership. Services like Pacific Boating and more recently Freedom Boat Club and BookMyBoat have emerged as popular platforms, granting access to a diverse fleet of vessels without the hefty price tag and ongoing responsibilities of individual ownership. This model allows individuals to enjoy the thrill of being on the water whenever they desire, choosing a boat that perfectly suits their needs for a particular outing, whether it's a fishing trip, a leisurely cruise, or watersports adventure. This flexibility and variety are key components of the share economy's appeal.

For emerging generations, the share economy in boating aligns perfectly with their values and priorities. These demographics often prioritize experiences over material possessions and are drawn to the convenience and cost-effectiveness of shared resources. The hassle of boat storage, regular maintenance, insurance, and potential depreciation can be significant deterrents to boat ownership. Share economy models effectively eliminate these burdens, making boating more accessible and appealing. Instead of being tied down by the responsibilities of ownership, younger individuals can readily embrace the joy and freedom of boating without the long-term commitment.

The success of these boating share platforms can be attributed to their ability to tap into this desire for experiences and hassle-free access. By offering a range of membership options and user-friendly booking

systems, they cater to both seasoned boaters and newcomers alike. The social aspect of some clubs, coupled with the opportunity to try different types of boats, further enhances the appeal. Ultimately, the share economy in boating provides a smart and sustainable way for more people to enjoy the beauty and recreation that waterways offer, fostering a new generation of boating enthusiasts.

As non-ownership boating models grow in popularity, policy-makers with the Australian Marine Safety Authority who administer the *Marine Safety (Domestic Commercial Vessel) National Law Act 2012* face the challenge of ensuring the right regulatory framework is in place to maintain appropriate safety standards in a way that recognises the 'recreational' nature of the activity.

Infrastructure capacity and condition

The past decade has seen significant improvement in Australia's recreational boating infrastructure, driven by successful State government grant programs. However, growing participation rates underline the need for continued investment to address repairs and upgrades, and meet growing demand.

Recreational boating infrastructure is typically located in exposed and often harsh environments requiring regular cleaning, repairs and proactive maintenance regimes to enable the assets to retain their functionality over their design life.

In many instances, these responsibilities fall to maintenance teams in local governments, which are also responsible for maintaining other recreational assets such as parks and playgrounds and may have limited knowledge of specialised marine assets. Councils can benefit from a deeper understanding of boating activity and its social, and economic value to underpin their infrastructure provision and maintenance role.

State government data on boating infrastructure remains inconsistent and fragmented. This lack of comprehensive information impedes targeted infrastructure investments and grant allocations to areas of greatest need.

As administrators of Crown and other government-owned land, State and Territory governments also control commercial leasing policies that apply to marinas and boatyards, with approaches to key elements such as rent determination and lease renewals varying across jurisdictions.

'policy makers need to focus on sustainable rents, security of tenure and incentivising private sector investment'

BIA is a strong advocate for the view of the International Councils of Marine Industry Associations (ICOMIA) that marina/ boatyard leasing policies should be more consistent nationwide and led by policy principles to deliver the best outcomes for the boating sector and therefor the boating public.



Generally, that means policy makers need to focus on sustainable rents, security of tenure and incentivising private sector investment in what is effectively public infrastructure. With most marinas and boatyards being set in prime waterfront precincts, there is also a range of opportunities for governments to partner with marina operators to deliver place-making outcomes that improve the amenity and overall attractiveness of precincts to both tourists and local communities. A fundamental issue for governments, with industry collaboration, is to actively support and retain an appropriate supply of maintenance, service and repair facilities (boatyards) in appropriate locations to ensure vessels can be kept fit-for-purpose and safe, thereby underpinning public safety on our waterways. Such boatyards provide a similar essential service as motor vehicle garages as both support public safety outcomes on our black (roads) and blue (waterways) highways.

The BIA, along with representatives from several State government agencies and other stakeholders contributed to the development of Australian Standard AS 3962:2020 Marina Design. This Standard provides important guidance for designers, manufacturers and operators of marina and vessel berthing facilities, including onshore facilities such as dry boat storage, boatlifts, boat ramps and associated parking facilities.

Beyond AS 3962:2020 there is no ongoing coordination or collaboration between jurisdictions on recreational boating infrastructure design and operation, limiting opportunities for asset owners and infrastructure investors to share knowledge and learn lessons from projects and facilities in other parts of the country.

While there are occasional technical events and seminars organised by professional bodies like The World Association for Waterborne Transport Infrastructure (PIANC) and the Institute of Public Works Engineering Australasia, more support is needed, particularly in guiding asset owners through maintenance requirements and climate change mitigation strategies.

Historically, government boating infrastructure programs have been constrained by insufficient data to demonstrate potential benefits and to understand the locations and type of infrastructure improvements that are likely to deliver the greatest public benefit. Unlike road and rail sectors, which leverage comprehensive datasets to measure impacts such as travel time savings and improved safety outcomes, recreational boating lacks similar analytical depth.

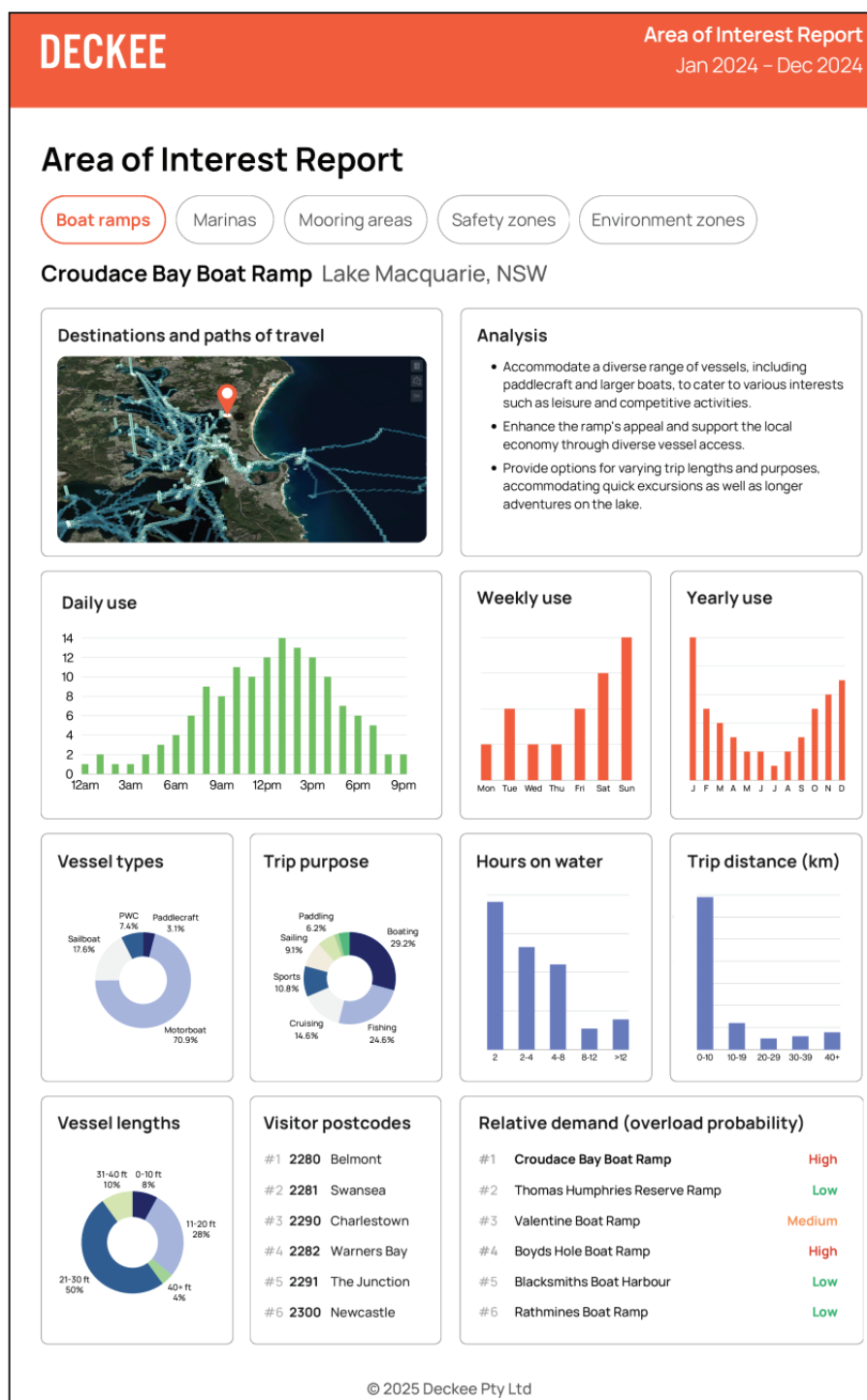
The recent growth in the availability and maturity of geolocational data such as that provided by DECKEE now provides the opportunity for infrastructure owners and investors to gain a better understanding of how boating infrastructure assets are used and to begin measuring the benefits of investments in upgrades and expansions. Such data could be used to assist governments (landlords), planners and policymakers to ensure adequate boatyard availability is supported in areas of high vessel concentration and/ or use.

Area of Interest reports developed by DECKEE can provide insights on the usage of boating infrastructure assets (see next page). This Area of Interest Report is focused on Croudace Bay Boat Ramp located in Lake Macquarie, just south of Newcastle.



Croudace Bay Boat Ramp is one of the largest boat ramps in the region and is a key access point for boating activity on the lake and for some offshore journeys through Swansea Channel. The data compiled in the Area of Interest report can:

- provide local boaters and safety compliance officers with information on the most popular time, day and month of facility use
- be used by the local council to effectively plan maintenance works and potential future upgrades
- provides users of facilities in populated areas such as Lake Macquarie on how heavily it is used compared to other boat ramps in the area
- be used by asset owners when applying for grant funding from state governments to demonstrate the benefits of proposed investments.

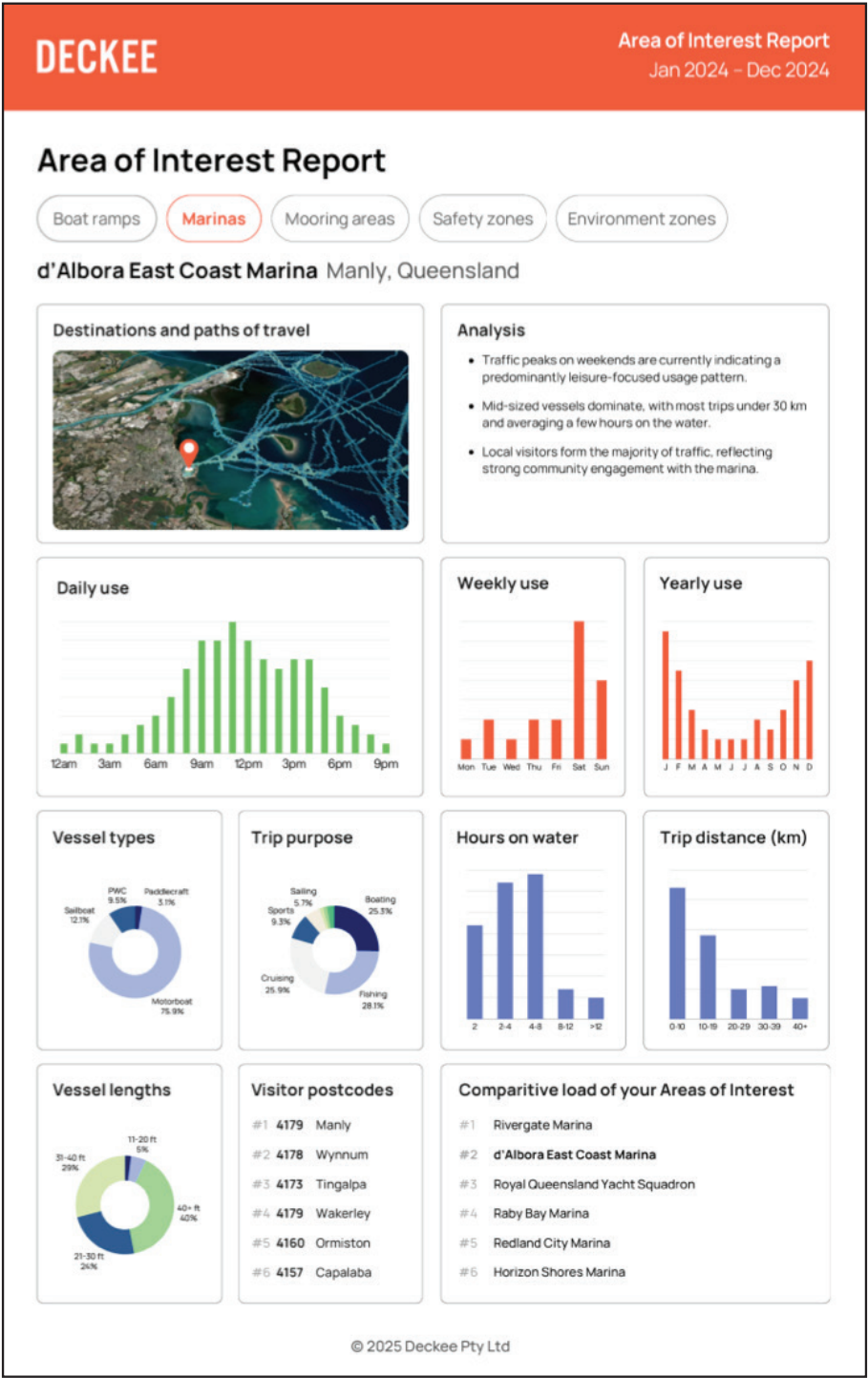


The same analysis can also be used to gain a better understanding of the usage profiles and patterns of other types of boating infrastructure.

The example (see below) is focused on boating trips generated from d’Albora East Coast Marina on Moreton Bay in Queensland. With 295 wet berths and 240 dry storage racks, East Coast Marina is one of the largest marinas in Queensland.

Comparison of the two Area of Interest Reports provides useful insights on the usage profiles of different infrastructure types, with the marina used by larger vessels that typically spend longer on the water.

The marina also demonstrates a much more profound usage peak on weekends compared to the boat ramp, particularly on Saturdays, and with daily usage peaking in the mid to late morning compared to an early afternoon peak for the boat ramp.



Skill shortages

ICOMIA has identified an ageing workforce as a critical threat to the long-term viability of the recreational boating industry globally. Australia is experiencing similar pressures, with competition for a limited supply of skilled workers driving up labour costs for manufacturers and service providers, ultimately increasing customer prices.

Currently skills shortages span a wide range of roles, including,

- Marine mechanics
- Boat builders and shipwrights
- Sailmakers/ trimmers
- Cabinet makers
- Electricians
- Boat detailers
- Boating services
- Metal fabricators
- Boilermakers
- Welders
- Riggers
- Painters
- Divers
- Marina managers
- Deckhands

‘93 per cent of marine businesses are concerned about availability of skilled labour’

ICOMIA’s identification of the key challenges in attracting skilled workers resonates strongly in Australia, including:

- Limited awareness of the job opportunities among young Australians;
- Predominance of small businesses which often have a limited ability to offer competitive wages, benefits, and career progression; and
- Significant under-representation of females in the workforce.

Other factors have exacerbated these challenges. For example, the availability of industry-specific Certificate III and IV training levels has been severely curtailed, with some States not offering TAFE-delivered training for several years.

Other States have reverted to concentrating training in capital cities or other single locations. Many courses previously provided are currently not offered at all. In some States, efforts to develop job-site-based training has been frustrated by State training regulations that prevent interstate providers from offering services.

A 2025 BIA National Jobs & Skills survey revealed 93 per cent of marine businesses are concerned about availability of skilled labour with 85 per cent concerned about the shortage of apprentices and more than 45 per cent reporting a consequent loss of revenue.

The survey returned many comments such as:

“I would employ an apprentice and tradesman today if they were available”

and

“All trades that we engage are always very busy and getting busier we need as much new blood and young people entering and completing training and trades as possible”.

Jobs & Skills Australia highlighted this supply and demand crisis of skilled labour in the marine industry by listing boat building and shipwrights on the national skills priority list. The limited understanding of the recreational boating sector’s significance is exemplified by the Maritime Industry 2024 Workforce Plan developed by Industry Skills Australia (ISA).

ISA was established as the Jobs and Skills Council for the Transport and Logistics industry sectors, which includes Aviation, Maritime, Rail, Transport and Logistics. One of its key functions is the development of national Workforce Plans for each sector to set out the workforce development challenges and opportunities facing the industry and serves as a roadmap for the future by identifying what industry, the national skills system and governments need to do to build an agile, highly productive and resilient workforce.

Despite State governments including recreational boating as part of their transport portfolios, ISA's national Workforce Plan for the Maritime sector is exclusively focused on the commercial operation of vessels to transport passengers and freight.

The Plan includes detailed analysis, initiatives and actions to support the future prosperity and sustainability of what ISA has identified as a national Maritime workforce of approximately 28,000. However, this ignores the 35,000 employees involved in the recreational boating sector.

Driving sustainability and thriving in a low carbon economy

The global recreational marine industry is a minor contributor to greenhouse gas emissions, accounting for less than 0.1%¹¹, compared to the Transport sector's 20% contribution. Despite this small footprint, the industry understands the need to invest and research new technologies, products and service offerings that reduce the carbon impacts of boating activities.

A shift is occurring in consumer preferences, with vessel manufacturers encountering increased interest from younger generations in environmentally conscious boat designs and technologies.

In 2023 ICOMIA commissioned Ricardo, a leading global engineering consulting firm, to produce the *Pathways to Propulsion Decarbonisation for the Recreational Maritime Industry* study. This groundbreaking report is the most comprehensive investigation ever undertaken into the vessel propulsion technologies. It analyses nine common recreational vessel types, evaluating:

- Greenhouse gas emissions
- Financial costs
- Usability
- Range and performance
- Infrastructure implications

Key findings reveal that decarbonisation strategies for recreational boating fundamentally differ from automotive sector approaches. Distinctions include varied private utilisation rates of boats compared to cars and diverse characteristics of recreational vessels.



Lifecycle impact assessments show that for average boats the largest carbon impact occurs during manufacturing, rather than operational use; emphasising the importance of enhancing vessel durability and protecting the significant embedded carbon investment in existing vessels.

The study found that no universal technology solution exists for sector-wide decarbonisation. Recommended approaches include:

- Recognition there is “no one size fits all” solution
- Availability of sustainable drop-in liquid fuels especially for the existing fleet of nearly 1 million registered boats in Australia
- Support for alternative propulsion systems such as electrification
- Support for industry to develop a life cycle analysis tool for the marine sector to achieving carbon reduction as there is significant CO₂ in the supply chain of materials and energy
- Global safety protocols and standards for new technologies
- Appropriate training programs to ensure the marine workforce has the skills necessary to install, maintain, service and repair the emerging propulsion systems.

11. ICOMIA Ricardo Study TBC?



Responsible
Boat Ownership

Launching on 29 September
for **Safe Boating Week 2025**
being run nationally until
6 October

While a comprehensive evidence base now exists, the complexity of decarbonisation requires collaboration. Industry, governments, and recreational boaters must collectively understand the range of technologies, policies and investments necessary to ensure the sector's sustainable future.

The BIA has a strong history of advocacy and working with governments and industry to undertake research and develop solutions to address environmental impact resulting from recreational boating. The BIA is taking a proactive role in fostering safer boating practices across Australia and New Zealand by spearheading a working group under the Australian New Zealand Safe Boating Education Group (ANZSBEG). This collaborative effort is dedicated to developing and implementing a comprehensive behavior change campaign known as "Responsible Boat Owner." Recognising that informed decision-making is foundational to safe boating, the initial phase of this campaign will strategically target individuals at crucial junctures in their boating journey: those purchasing their first vessel or upgrading to a new or used boat. By focusing on this audience, ANZSBEG aims to instill a culture of responsibility and safety from the outset.

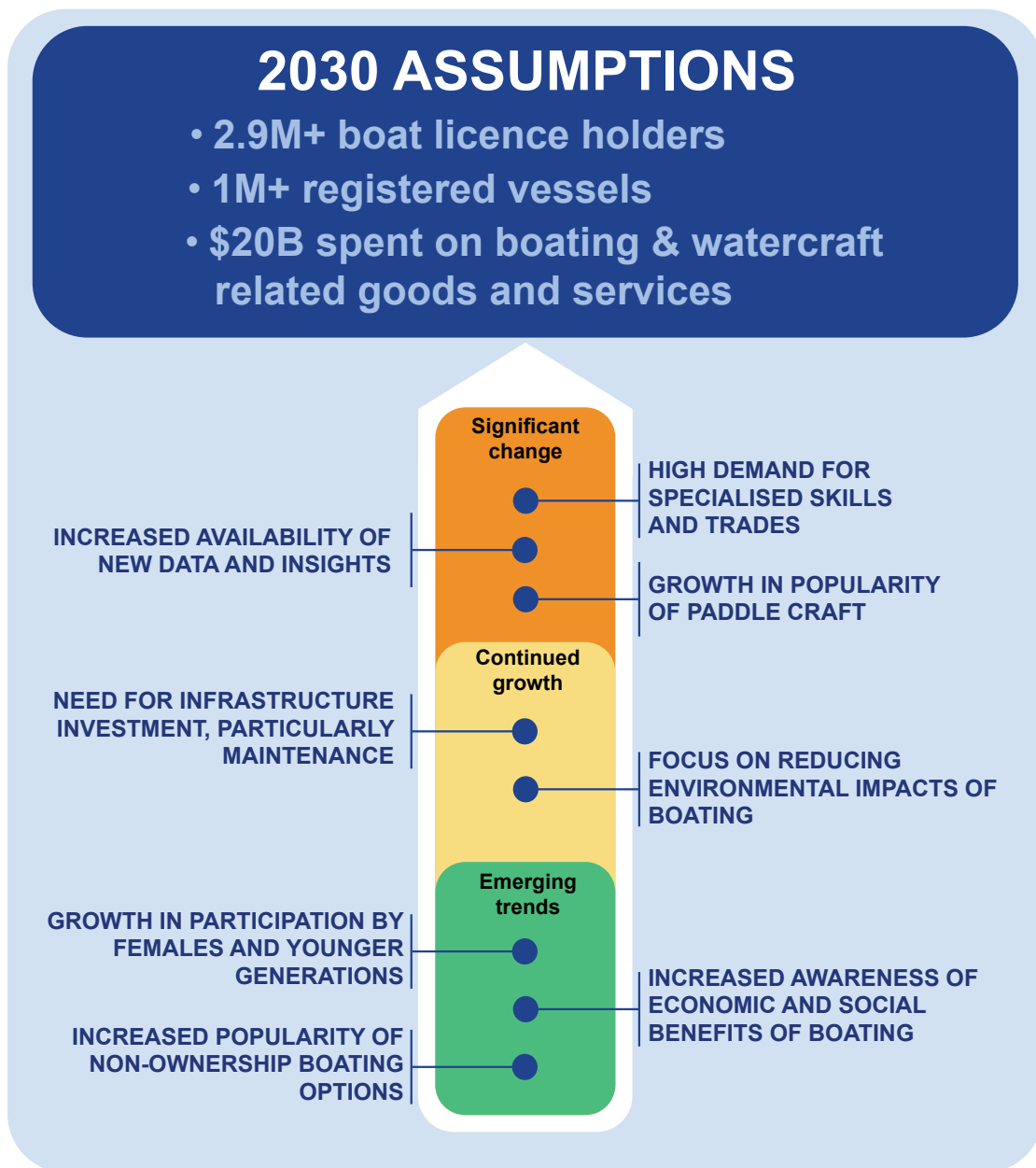
The first phase of the "Responsible Boat Owner" campaign will concentrate on empowering prospective and upgrading boat owners with the knowledge and resources necessary to make sound choices. This will involve creating easily accessible educational materials, such as online guides, checklists, and videos, highlighting key considerations like matching the boat to intended use and experience level, understanding legal and safety requirements, and the importance of pre-purchase inspections. The BIA, leveraging its industry expertise and network, is collaborating with other stakeholders within the working group to ensure the campaign's messaging is clear, impactful and reaches the target audience effectively through numerous channels, including dealerships, online platforms and boating events.

Ultimately, the BIA's leadership in this initiative underscores the industry's commitment to promoting a safe, responsible and enjoyable boating environment for everyone. By equipping new and upgrading boat owners with the tools to make informed decisions, the "Responsible Boat Owner" campaign's first phase aims to lay a strong foundation for responsible boat ownership, contributing to a reduction in incidents and fostering a greater appreciation for maritime safety across Australia and New Zealand. This proactive approach not only benefits individual boaters and maritime regulators, but also enhances the overall reputation and sustainability of the boating industry.



4. LOOKING TOWARDS 2030

Based on the research and data analysis undertaken in developing the National Recreational Boating Statement, the BIA has developed a set of assumptions that forecast the recreational boating sector in 2030.



5. STRATEGIC FRAMEWORK

The BIA has developed a Strategic Framework to help unify and guide decisions and actions across the recreational boating sector over the next five years. The Framework is relevant for both government and industry and is based on working towards a shared vision that is hoped all stakeholders can support. The Vision is underpinned by four strategic Pillars that can be achieved by focusing on a set of identified Priority Actions.

Vision

Recreational boating is recognised as a valuable contributor to Australia's economic and social fabric, with industry and governments collaborating to drive sector growth through strategic investment, informed decision-making, and a comprehensive, accessible evidence base.

Pillars

Awareness

Increase awareness by all levels of government, industry and the general public of the social and economic benefits of and demand for all forms of recreational boating activity in Australia.

Insights

Improve levels of confidence from investors and decision makers across government and industry enabled by meaningful data and insights about recreational boating activity in Australia and its resultant benefits.

Investment

Drive strategic investment in access and infrastructure programs, and services to support recreational boating as an affordable and accessible activity for everyday Australians, and an attractive career pathway for young people.

Resilience

Position the recreational boating sector to anticipate, adapt to, and make the most of emerging global and national economic, societal, technological and environmental trends through proactive planning and innovation.

Priorities

The BIA has developed a set of priorities to support the National Recreational Boating Statement Strategic Framework by 2030. These priorities aim to enhance the Australian recreational boating sector through targeted collaborative approaches across government, industry and community stakeholders.

Diversify participation

1. **Increase the proportion of Australian boaters who are female, from younger generations, from a variety of cultural and socioeconomic backgrounds, and from a range of levels of physical ability.**

Collaboration between governments, industry and stakeholders to develop initiatives and reduce financial, physical and cultural barriers to encourage increased diversity in the Australian boating population. This includes government consideration of affordable fee regimes and measures to ensure boating infrastructure is more accessible to people with different levels of physical ability.

Improve data collection and consistency of evidence base

- 2. Improve the level of data collected by State and Territory regulators and improve consistency in the terminology, metrics, analysis and method of reporting.**

Data provided to the BIA to develop the National Recreational Boating Statement has highlighted data gaps and variations across government jurisdictions. Improved coordination and consistency is required in the collection and analysis of data from both traditional sources and from increased embracing of new and emerging geolocational data sources tailored to waterway usage.

Increase understanding of infrastructure needs

- 3. Conduct a national stocktake to assess the capacity, condition and accessibility of boating infrastructure facilities, providing key insights for future investment and development strategies.**

Understanding the current state of boating infrastructure is crucial for strategic future development. This stocktake will provide a detailed analysis of facility capacity, structural condition, and accessibility across different jurisdictions. Mapping existing infrastructure, identifying gaps, and evaluating current utilisation will inform more targeted investment strategies, ensure equitable access, and develop infrastructure that meets the evolving needs of diverse boating communities.

- 4. Develop consistent guidelines and templates to assist infrastructure owners in understanding best practices in the design, operation and maintenance of boating infrastructure facilities.**

Improving the recreational data evidence base is not just about improved usage data. Asset owners and investors need a greater understanding of the capacity and condition of the existing infrastructure base in order to help maximise the benefits of future investments. The specialised nature of marine infrastructure assets also means that asset owners would benefit from increased information sharing and guidance about best practice asset management.

Reduce industry skill shortages

- 5. Develop a National Marine Careers Plan**

The BIA will lead development of a National Marine Careers Plan in collaboration with industry, stakeholders and government, in particular through engagement with relevant education training and vocational agencies and institutes at the State and federal level. The Plan will highlight the skill shortage challenges facing the sector by tracking emerging trends in jobs and skills demand and identifying a suite of actions to reduce barriers and provide incentives for people, particularly from younger generations, to choose a career in the marine sector.

Reduce environment impact and develop targeted responses to a changing climate

- 6. Promote an increased understanding across industry, government and the general public of the issues that offer the greatest potential to reduce the environmental impact of recreational boating.**

Although the boating sector contributes just 0.1% to global greenhouse gas emissions compared with Transport at 20%, the BIA recognises it has a role to help government meet its international obligations under the Paris Agreements. BIA will continue to engage with policymakers and work to ensure government decisions are made on appropriate data. BIA will also work with ICOMIA on development of a life cycle analysis tool to help industry to decarbonise the sector.

- 7. Collaborate across jurisdictions to develop a national framework to guide the design of tailored sustainability solutions at the State and local level.**

The sector has already made significant progress in understanding the key environmental impacts of recreational boating, and in responding to emerging changes in consumer sentiment through innovations in technology, design and ownership models. However, more work is required to encourage policymakers to develop solutions informed by the latest research and analysis.

Most boaters are also conscious of preserving the environment of their local waterway and welcome targeted and evidence-based regulatory, service delivery and infrastructure responses from State and local authorities. Responses should be tailored to the unique characteristics of individual waterways.

However, there is much that can be done through improved collaboration at the national level to develop best practice guidelines and tools to help State and local authorities and policymakers develop responses to issues such as managing end-of-life vessels, availability of sustainable fuels, minimising the spread of invasive aquatic species and appropriate marine infrastructure.

Continue national collaboration on boating safety

8. Increased adoption of Safe System approach by marine regulators.

The ARBSC provides a positive model and demonstration of how marine regulators across Australia can deliver improved outcomes through regular interaction, knowledge sharing and collaboration on projects investigating issues that are common across jurisdictions. Despite these benefits the BIA supports increasing consistency among regulators through adoption of a Safe Systems approach, which is based on the three key elements of Safe People, Safe Vessels and Safe Waterways (which encompasses infrastructure including marinas).

Each of these elements are interlocked to provide an integrated and systems approach to public safety in boating based upon long-term incident data and objectively analysed. The Safe Systems approach has already been adopted by some jurisdictions, including NSW where the model underpins the NSW Boating Safety Plan. It is noteworthy that the success of such plans include a focus on education and behaviour change campaigns led by regulators and supported by industry.

Improve national collaboration on all recreational boating issues

9. Expand the role of the ARBSC beyond safety and include industry representation to provide a national forum for promoting collaboration and coordination across the Australian recreational boating sector.

Improved collaboration across jurisdictions and with industry is a critical enabler of all of the other Priorities identified in National Recreational Boating Statement. Successful operation of the ARBSC over many years has shown what can be achieved through jurisdictions meeting on a regular basis to identify emerging trends, undertake research and determine best practice strategic responses, that authorities can use to tailor solutions best suited to their local circumstances.

The inclusion of representatives from key industry bodies, such as the BIA, can help ensure national deliberations are informed by the latest knowledge and innovations from the sector and an improved understanding of how decisions made by governments impact on the thousands of businesses operating in the sector and the customers they serve.

Organisations involved in the group should not just be limited to Transport regulators, with policymakers and subject matter experts from other government agencies should be invited to participate as required.

VISION

Recreational boating's contribution to the economic and social wellbeing of Australian society is widely recognised, with industry and governments working together to support the growth and resilience of the sector through increased investment and more informed decision making enabled by a robust, consistent and readily accessible evidence base.

PILLARS



AWARENESS

Increase awareness by all levels of government, industry and the general public of the social and economic benefits of and demand for all forms of recreational boating activity in Australia.



INSIGHTS

Improve levels of confidence from investors and decision makers across government and industry enabled by meaningful data and insights about recreational boating activity in Australia and its resultant benefits.



INVESTMENT

Increase investment in access and infrastructure programs and services needed to support the ongoing viability and growth of boating as both an affordable and accessible recreational activity for everyday Australians, and a viable and attractive career choice for young Australians.



RESILIENCE

Ensure the recreational boating sector is both resilient to, and ready to take advantage of opportunities arising from emerging global and national economic, societal, technological and environmental trends.

PRIORITY ACTIONS THAT CAN SUPPORT PILLAR OBJECTIVES BY 2030



PARTICIPATION

- Promote measures to encourage participation in boating – including from more diverse segments of society (gender, age, ethnicity, socioeconomic status) also to address changing demographics eg., trends in sharing economy etc.
- Reduce barriers to participation (eg review high fees)
- Affordability (eg perception that boaters are loaded with disposable income)
- Access and storage



IMPROVE DATA

- Establish national repository of key data sets with consistent definitions, categories, measures etc (using data in the Statement as a starting point).
- Make better use of emerging insights from geolocational and other data collected from App developers and telecommunication providers (provide case study highlighting what insights can be gained from Deckee data in a sample location(s) – eg Port Stephens)
- DECKEE activity data offers significantly more context than telecom providers whilst upholding user privacy.



INFRASTRUCTURE

- All jurisdictions to undertake a stocktake of condition and capacity of current infrastructure and develop a gap analysis of future investment requirements based on demand forecasts
 - Mooring plan for all types of in-water boats and not just the luxury end
 - Marina plan
 - Dry stack plan
 - trailer parking plan
- Consistent methodology for forecasting demand and guidelines on best practice infrastructure design to be developed through new intergovernmental coordination group
- Expand remit of ARBSC/ANZSBEG beyond just safety (or come up with new inter-jurisdictional committee) to coordinate government programs and policies and share information on boating infrastructure, skills and productivity issues.



COORDINATION

- Expand remit of ARBSC/ANZSBEG beyond just safety (or come up with new inter-jurisdictional committee) to coordinate government programs and policies and share information on boating infrastructure, skills and productivity issues.



SAFETY

- Better consistency across jurisdictions based on Safe Systems approach.



SKILLS

- The BIA will lead development of a National Marine Careers Plan in collaboration with industry, stakeholders and government, in particular through engagement with relevant education training and vocational agencies and institutes at the State and Federal level.



ENVIRONMENT

- Government and industry working together to develop plans/strategies for:
 - propulsion decarbonisation and end-of-life vessel disposal/ recycling/ repurposing
 - Sewage solutions
- Position boating as an enabler to accessing the great outdoors/ environment
- Consistent methodology for forecasting demand and guidelines on best practice infrastructure design to be developed through new intergovernmental coordination group
- Expand remit of ARBSC/ANZSBEG beyond just safety (or come up with new inter-jurisdictional committee) to coordinate government programs and policies and share information on boating infrastructure, skills and productivity issues.