



Submission: MSQ Demand Study

ISSUE: MSQ Demand Study

SUBJECT: Boating in Queensland

INTRODUCTION: The Maritime Assets and Infrastructure Unit, Maritime Safety Queensland is coordinating a Demand Study relating to recreational boating. The study is expected to help inform strategies, policies and programs in support of infrastructure for boating.

The key contact is:

Roger Priest

Manager (Boating Infrastructure)

Maritime Assets and Infrastructure Unit

Maritime Safety Queensland

Department of Transport and Main Roads

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SUBMISSION

The BIA commend Maritime Safety Queensland for the opportunity to provide our input.

The Boating Industry Association Ltd (BIA) is the peak industry body in Australia that represents the interests of boating which includes designers, manufacturers, importers, brokers, insurers, retailers, charters, yacht and boat clubs, marinas, events, surveyors and trades from boat builders to riggers, and more. BIA is an advocate for boaters and the boating lifestyle and supports safe, responsible, and enjoyable boating.

The boating economy generates significant benefits through employment. Last year the industry reported national turnover of \$9.55 billion, directly employed more than 26,000 people with more than 8000 contractors. In Queensland, industry reported \$3.83bn turnover, 13,200 direct employment, thousands more in contractors and 600+ active boating industry business.

Our industry has seen growth in total revenue over the past year of 8.1% and across the last five years, that growth has been 15%, with the challenges of COVID included. This growth reflects demand and participation. I have attached the latest State of the Industry Report for your information.

Seventy-five per cent of our members are in small family businesses, employing local workers and supporting local communities.



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With more than 85 per cent of the population living within 50km of the coast, it is little wonder that almost 1 in 5 households can have a boat or watercraft. People of all ages, gender and ability can participate in boating across paddle, sail and power for leisure and sport.

So it is no surprise boating is a way of life for many families in Australia, the largest island in the world with 35 821km of coastline. It is estimated that nationally 5 million people participate in some form of boating each year and Queensland forms a significant part of that total. Most of this activity occurs in family runabouts and small craft (paddle and sail).

Boating is a significant contributor to the economy that spans metropolitan, rural and regional Australia.

Through COVID-19 boating proved to be a standout choice in leisure activity. The combination of no international travel, the staycation phenomenon, flexible work practices and the need to be COVID Safe saw interest in getting out the water ramp up significantly. A boat is like an island where you choose where to go, when and who with, and its supports compliance with social distancing. Not only that, but it is good for your body and mind.

Work in social science has shown that on a boat, feel-good hormones like dopamine, serotonin, oxytocin go up, while cortisol which is stress goes down.

All of this led to a significant increase in people taking up boating for the first time; this was reflected across the country with increases in boat driver licence numbers and increases in people taking up boating courses.

The increase in participation has resulted on increased pressure on infrastructure at the land-water interface. Our waterfronts are finite are in hot demand, and need careful and considered planning.

To give a sense of the demand for boating, Australian boat builders have been trading strongly. In one example, Australian recreational boat builders have seen improved exports over the period:

- 2019 = \$113.6M
- 2021 = \$241.8M

As an example of demand, two leading builders on the Gold Coast increased their workforce over the last two years:

- Riviera increased their workforce from 600- 800, including 74 apprentices; and
- Maritimo were earlier this year boosting numbers by 60 new craftspeople.



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Boating also plays a significant role in tourism, through recreational and commercial activities ranging from hire boat operations in regional areas through to major aquatic events that register on an international scale.

The opportunity is to value our land water interface as places for public access and infrastructure in support of destinations by some of the best waterways in the nation to deliver a quadruple bottom line of social, economic, environmental and cultural benefits from boating. BIA would encourage MSQ to consider an integrated approach to opportunities at the land-water interface to better connect what could be called a Green Blue Grid (were land meets sea) that can deliver to the quadruple bottom line with benefits in transport connectivity, destinations, access, social well-being, economy and jobs.

The BIA applauds the work of Maritime Safety Queensland to put context around the increasing demand for boating.

Please do not hesitate to contact Mr Neil Patchett, General Manager Government & Public Relations, e. neil@bia.org.au or m. 0418 279 465 on this matter.

Issue date: 2 December 2022

The marine industry in Australia by the numbers

2022 Industry data



Turnover in 2021-22

\$9.55bn



8.1%
on 2021

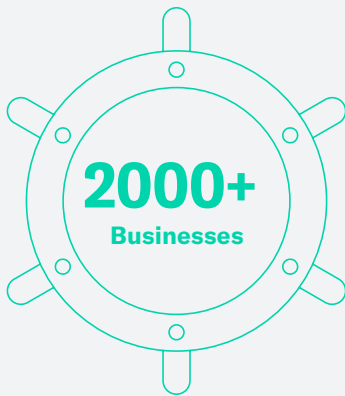
26,000

People employed directly by the industry + more than **8000 contractors** engaged.

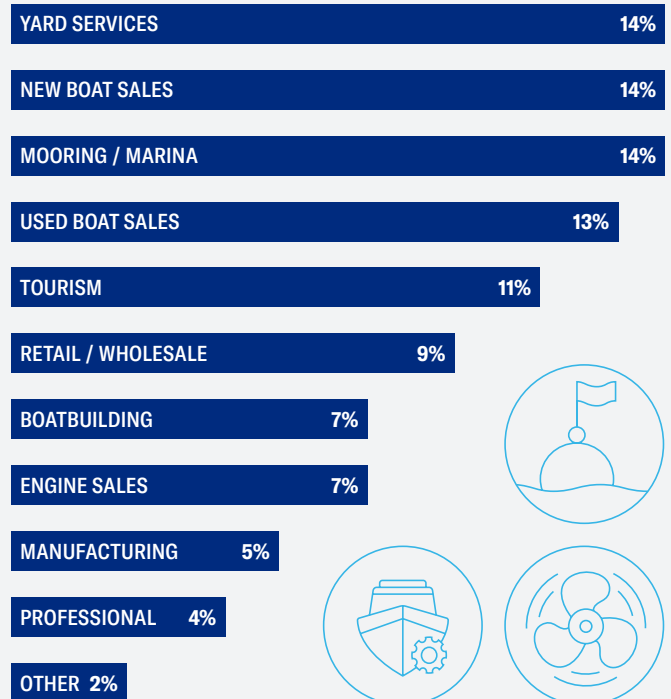


Industry profile by sector

The marine industry covers a broad range of sectors, with yard services, new boat sales, storage and charter operators leading the way.



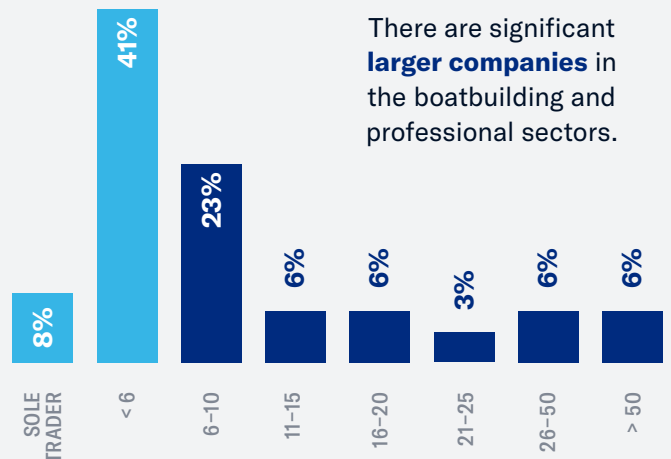
Operating in the **recreational, superyacht and commercial marine** sectors in Australia.



Industry profile by employment



Companies in the marine industry are predominantly smaller businesses, typically employing **less than 6 people**.



There are significant **larger companies** in the boatbuilding and professional sectors.

Recreational fleet key data

85%

Boats under 6m

75%

of fleet less than 10yrs old

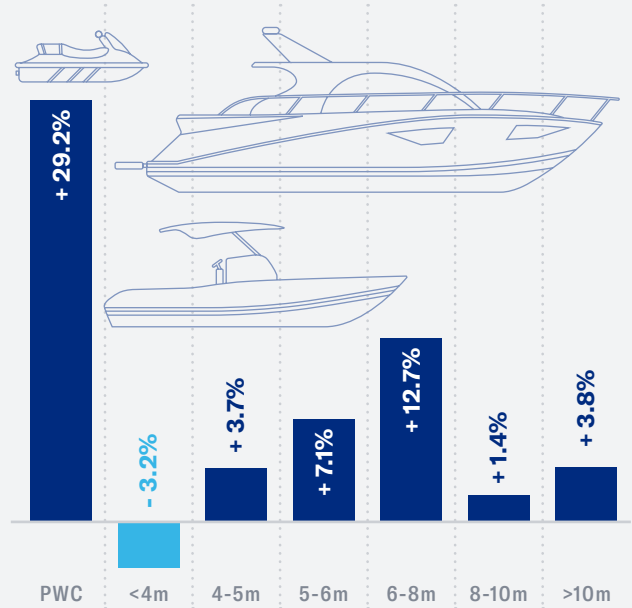
62%

Aluminium boats

33%

Fibreglass boats

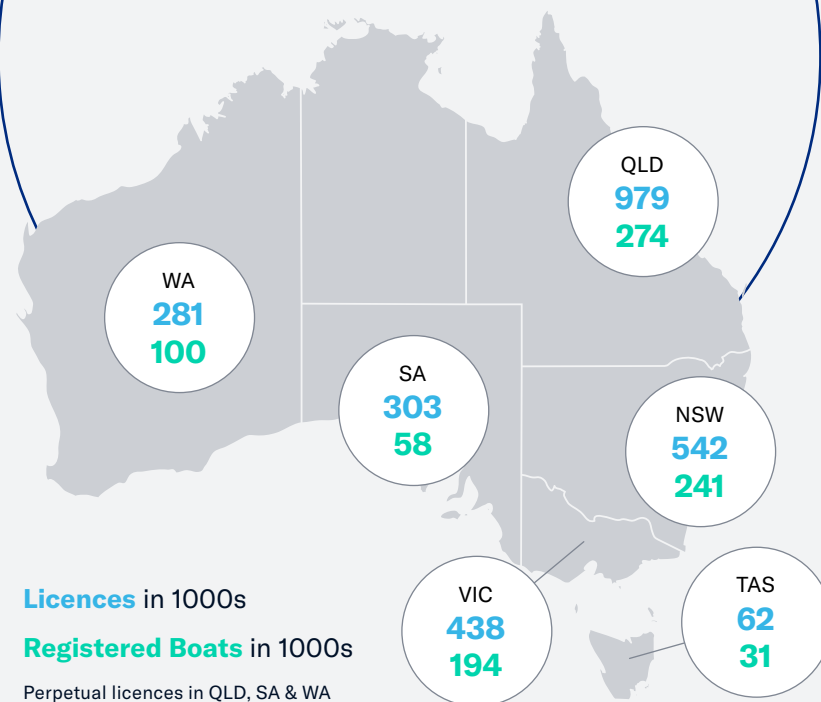
Change in length over 5 years



A nation of boaters

2.5m

Boating is one of the leading pastimes in Australia
1 in 10 Aussies have a boat licence



Licences in 1000s

Registered Boats in 1000s

Perpetual licences in QLD, SA & WA

Countless
non-powered watercraft

Strong growth in non-powered sector
- outdoor, healthy lifestyles



925,000
registered boats

plus as many sailing dinghies,
paddle craft and SUPs

18,500+
new registrations



90,000+
PWC registered

The fastest growing sector
of powered vessels