



2019 Recreational Boating Participation Research

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Richard Griffiths

Jonathan Dodd

Sara Beccari

Ruth Davy

Yazad Karkaria

Hanrie Le Roux

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Introduction

This Executive Summary presents the results of the 2019 Recreational Boating Survey which was conducted amongst a nationally representative sample of New Zealand adults, aged 18 years and over. This research was conducted by Ipsos New Zealand on behalf of the Safer Boating Forum, led by Maritime New Zealand (Maritime NZ).

The purpose of the survey is to examine the extent to which the New Zealand adult population currently participates in recreational boating activities, with a focus on safety-related attitudes and behaviours, and awareness of Maritime NZ's recent recreational boating safety campaigns and related activities.

Background

In 2013, 2014, and 2016 Maritime NZ commissioned an independent research agency to conduct a telephone (landline) survey on recreational boating to estimate the ownership of recreational vessels, the general public's involvement in recreational boating, and their attitudes towards recreational boating safety behaviours.

Change of methodologies / research providers

In 2017 Ipsos New Zealand undertook the 2017 Recreational Boating Survey. The survey was conducted online amongst a nationally representative sample of the adult population, reflecting the declining use of landline phones in New Zealand and the now well-established methodology of online surveying.

Respondents were recruited from an online research panel (SSI <https://www.surveysampling.com>) and were emailed a link to the online questionnaire to complete¹. The online (2017) and telephone (2016) questionnaires were kept as similar as possible to reduce any possible biases caused by the different data collection methods, but the ability to show visuals and ask more complex questions within the online environment will inevitably have led to some difference in response. Ipsos conducted the 2017 online survey from 24th April to 8th May 2017.

Ipsos repeated the online Recreational Boating Survey in 2018 with data collection from 23rd April to 8th May 2018. The 2018 survey added new questions about the amount boaties spent on fuel and types of fuel, the frequency of boating trips compared to 2017, and reasons as to why their vessel usage changed or stayed about the same. Additionally, respondents were asked to recall national *Safer Boating* campaigns or activities compared to a broader regional and national focus the previous year.

The last key point of difference between the 2017 and 2018 waves is that in 2018 'booster' samples were gathered in the Auckland, Waikato, Canterbury, and Wellington / Wairarapa regions. The increased number of respondents from these areas provided a more robust picture of recreational boating in these locations.

For the 2019 research, data was collected from 16th April to 9th May from the same online Recreational Boating Questionnaire. Although no new questions were added this year, a small number of additional options were included in the 2019 questionnaire to provide some further potential insights pertaining to recreational boating in the Taupo region and what sort of other items boaties might take with them on excursions (e.g. food, water, spare fuel, etc.). As in 2018, respondents were invited to recall national

¹ The 2016 results referred to above are available to access on the Maritime NZ website for further reference (https://www.maritimenz.govt.nz/recreational/safety-campaigns/recreational-research.asp#research_2016).

Safer Boating campaigns or activities. The MarineMate application ('app') was also included in the latest survey. Respondents were recruited from the Dynata panel (which is the new company formed from SSI and Research Now). There were no booster samples in 2019.

In the three waves of Ipsos data collection to date, data has been slightly weighted to align to New Zealand population statistics.

Impact of the summer season on the results

The different types of summers experienced since 2017 must be considered when making direct comparisons between 2017 to 2019. The 2017 survey was conducted following one of the worst summers New Zealand has ever had. Cold and windy weather was common that summer. By comparison, the 2018 summer was the hottest summer on record in this country. Additionally, rainfall levels were highly variable from month to month and the impacts of ex-tropical cyclones Fehi and Gita in February 2018 were especially significant with that month being the wettest month of the summer.

According to NIWA's *Seasonal Climate Summary* issued in March 2019, the 2018–19 New Zealand summer was the country's third-warmest summer on record. While December experienced frequent thunderstorms, January and February had widespread dry and sunny conditions. The weather may have an impact on boating behaviour, and seasonal variations from year to year may have an impact on some trends observed in this report. This research has deliberately not been conducted in peak summer months, as the intention of this research is to obtain information on those who go boating regularly / throughout the year, rather than just at the summer peak (if interviewing was done during the summer peak then we would risk over-representing summer-only boaties).

Reporting on Margin of Error and significant differences

The margin of error associated with a probability sample of $n=2,174$ is $\pm 2.1\%$ at a 95% confidence interval. This means that 95 times out of 100, we would expect to achieve a result of "50%" to fall between 47.9% and 52.1%.

Throughout the report the statistically significant differences between different subgroups and the total have been shown in **green** when higher than the total and in **red** when lower than the total. This highlights areas where, due to the representative nature of the sample and its size, there is statistical confidence that the difference between these subgroups would not be the result of random chance for 95% of the time.

For subgroups of the main sample (e.g. kayakers), the magnitude at which a difference becomes statistically significant has to be larger, to overcome the larger margin of error that arises from smaller groups of respondents. This is accounted for in our reporting and explains why, for example, a 5% difference may be highlighted as statistically significant for one sub-sample and not for another, smaller sub-sample. In addition, the margin of error shrinks the more unanimous a result, which also explains why a result of 55% may not be marked as statistically significant whereas a result of 98% may be.

Lastly, there are places in the report where we note differences that are not statistically significant yet which we believe are worth highlighting. A typical example of this is when changes over time indicate a trend which may be occurring, even if not statistically significant (e.g. small 2% increases over several waves may indicate a shift which is not significant year-on-year, but which are over the longer period of time). In examples such as this we refer to the differences using terms such as 'slight' or 'marginal', but never 'significant'.

Reporting on Dinghies

In reporting to date (2017-2019), wherever dinghies have been referred to in the main body of the research report, this refers to both powered *and* unpowered dinghies. This has been done to maintain comparability with results across the three years. Please note that for the 2019 report a new and additional analysis has been provided for users of *all* small-powered vessels. The relevant section on pages 43-46 of the report combines the results for boaties who reported that the main vessel they own, use or spend time on is either a dinghy that at least 'sometimes' uses a motor and/or a small powerboat of up to 6 metres.



Conclusions and Recommendations

The four key risk factors identified and targeted by the Safer Boating Forum are:

- 1) Failure to wear lifejackets in small craft
- 2) Inability to communicate when an accident happens
- 3) Failure to check forecasts to avoid boating in bad weather and sea conditions (and)
- 4) Alcohol consumption, as it is likely to impair judgement and may be a factor in accidents and fatalities

The 2019 research indicates that while improvements have been made by recreational boaters in some of these key areas, there are some results where decreases are evident. A significant decrease in the proportion of non-drinkers is one such example.

Lifejacket Usage

Lifejackets continue to be the most prevalent form of safety device taken on boating trips. However there has been a significant decrease in 2019 in the number of boaters who say they ensure there are enough lifejackets for all their passengers 'every time' they go out on a normal excursion, and 20% of boaters reported wearing a lifejacket either 'never', 'not very often', or only 'some of the time'.

Lifejacket Behaviour Change Priorities:

The key lifejacket usage behaviours still need to be promoted, especially on larger vessels where boaters can feel more complacent. Boaters need to feel that lifejacket usage, and the encouragement of it, is socially acceptable.

On-Board Communication Devices and Related Education

Following a significant increase in 2018 in the number of boaters who reported having at least two ways to either call or signal for help if needed 'every time', there has been a marginal decrease in this key behaviour this year. The percentage of those taking emergency position-indicating radio beacons (E-PIRBs) has significantly increased in 2019, apparently as they are adopted in preference over personal locator beacons (PLBs), whose usage has decreased.

More than a third of boaters remain unaware if the beacons being used on their boats have been registered; however, the unawareness level has continued to increase year-on-year since 2017.

Communication Behaviour Change Priorities:

While boaters are feeling increasingly more motivated to ensure that safe-signalling is practiced when on board, and feel socially-supported in these motivations, their ability to signal themselves, or to ascertain if other passengers and the equipment itself is capable, remains weak. Skippers need to be encouraged to train others on board about this equipment usage.

Marine or Mountain Weather Forecast Usage

There has been little change in the number of boaters who report they check either the marine or mountains forecast before every boating excursion.

Behaviour Change Priorities for Weather-Checking:

The use of weather-checking services like the MarineMate smartphone app needs to be promoted more, along with its use for every trip.

Alcohol-Free Boating

There has been a significant decrease in the proportion of non-drinkers in 2019. In contrast, there has also been a significant increase among those who agreed with the statement 'I know how to reduce on-board alcohol consumption to avoid problems'.

Behaviour Change Priorities for Reducing Alcohol Consumption:

There is a strong conflict between boaties' being motivated to reduce drinking and having the ability to do it, and the social barriers stopping alcohol minimisation techniques being put into action. Boaties widely accept the need to restrict alcohol when boating, but need to be persuaded that their personal opinion about alcohol (regarding drinking and how much is drunk) will make a difference when a group of friends and / or family are out on the water.



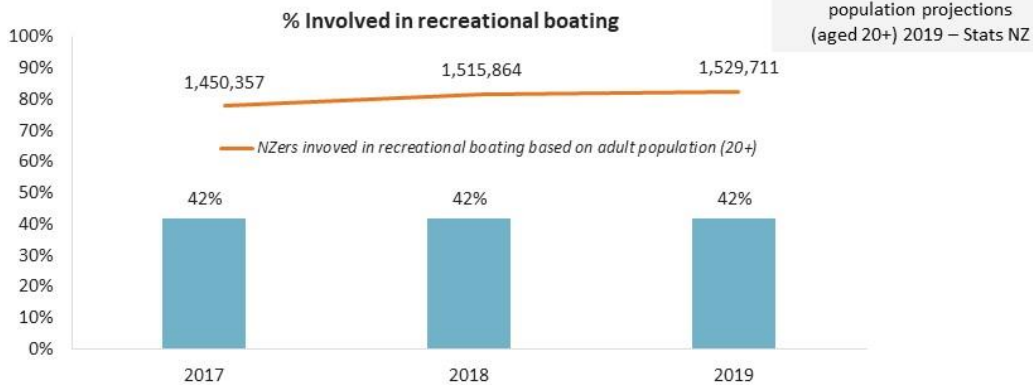
Recreational Boating

Population Overview

Of the 2,174 people surveyed in 2019, as in the previous two years, 42% identified themselves as being involved in recreational boating. Based on this, and the Statistics NZ estimated population as of May 2019 (aged 20 years and over), this represents approximately 1,529,711 adult New Zealanders who are involved in recreational boating². Although the same percentage of New Zealanders identified themselves as being involved in recreational boating over the past three years (42%), the NZ population has increased over these years and thus the number of boaties has also increased by 79,354.

NZERS INVOLVED IN RECREATIONAL BOATING

Approximately 1,529,711 adult NZers are involved in recreational boating



Q5: Can you tell me if you own, skipper or use any of the following types of vessels? Please note this only includes vessels used for recreational / leisure purposes, not those used for commercial purposes or charter boat operations.

Base: NZers 18+ (2019 n=2,174, 2018 n=3,101, 2017 n=2,122)

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GAME CHANGERS



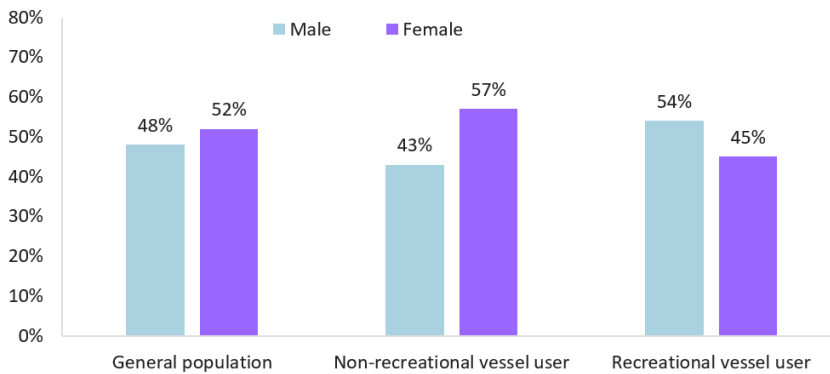
Note: The 2017, 2018, and 2019 surveys were all conducted following the summer period.

‘Involved’ is defined as owners of a recreational vessel, non-owners in charge of or skippering a recreational vessel, and those spending time on a recreational vessel (but who do not own or skipper it). The definition of ‘recreational vessels’ ranges from small vessels (windsurfers / kayaks) to larger vessels (power boats / sail boats more than 6 metres long).

² Data which is available on the Stats NZ website was used to calculate the number of New Zealanders who are involved in recreational boating. **Note:** Given the age bands that are provided by Stats NZ, it was possible to calculate population figures only for those aged 20+ years.

GENDER

There continues to be a larger percentage of male recreational boaties, with results almost identical to 2017 & 2018



Gender	2017	2018	2019
Recreational vessel user			
Base, n=	902	1,227	900
Male	54%	54%	54%
Female	45%	46%	45%
Non-recreational vessel user			
Base, n=	1,220	1,874	1,274
Male	43%	43%	43%
Female	57%	57%	57%

Q2: Do you best identify as...? (0% of Non-Gender specific)

Base: NZers 18+: General population (n=2,174), Recreational boating owners / users (n=900), Non-recreational boating owners / users (n=1,274)

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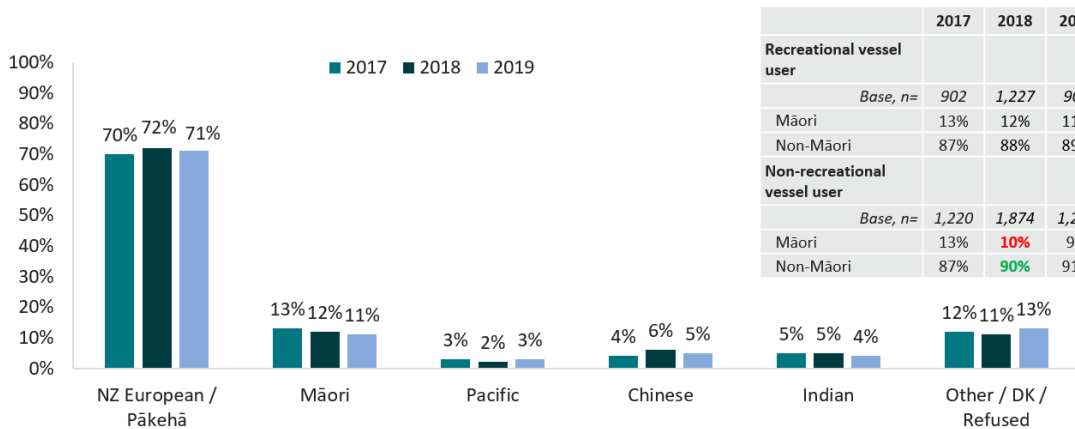
GAME CHANGERS



The majority of the recreational boating community members in New Zealand are male (54% vs. 45% females in 2019). There has been virtually no change in the number of male and female recreational boaties during the past three years (see the Gender table above).

ETHNICITY

Trends are very similar to 2017 & 2018



	2017	2018	2019
Recreational vessel user			
Base, n=	902	1,227	900
Māori	13%	12%	11%
Non-Māori	87%	88%	89%
Non-recreational vessel user			
Base, n=	1,220	1,874	1,274
Māori	13%	10%	9%
Non-Māori	87%	90%	91%

Q3: Which ethnic group or groups do you belong to? (multiple response)

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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Significantly higher vs. previous wave is shown in green
Significantly lower vs. previous wave is shown in red

GAME CHANGERS

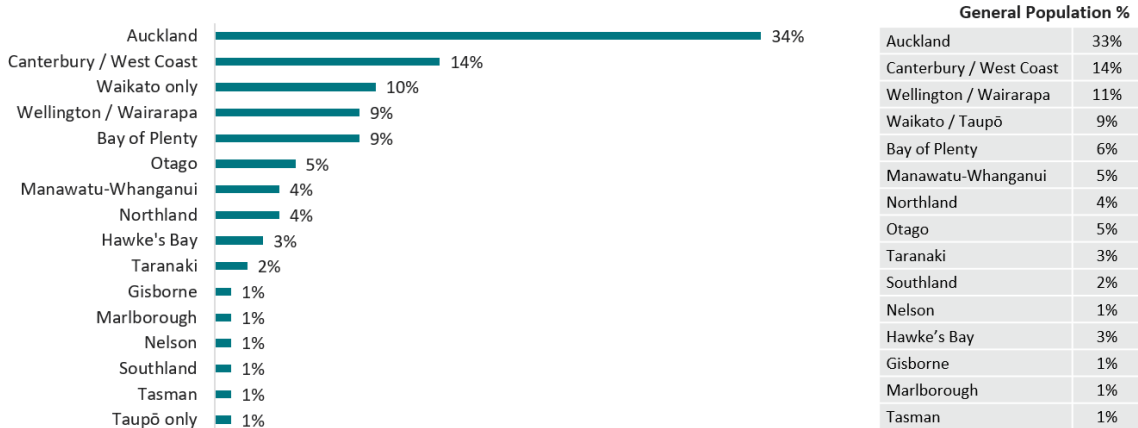


Recreational vessel users are again more likely to be New Zealand European in 2019. Although there has been very little change in the number of boaties who identify as Māori over the last three years, results suggest that there is a trend of slowly declining Māori participation in recreational boating. The numbers of Chinese and Indian boaties continue to remain relatively stable.



REGION

The highest population of recreational boaties is again in Auckland & Canterbury / West Coast, aligned with the overall population



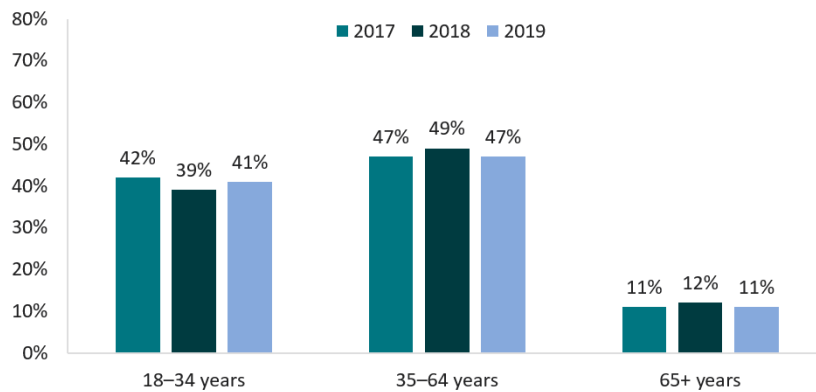
Q4: In which of the following regions do you normally live?
 Base: NZers 18+: Recreational boating owners / users (n=900), General population (n=2,174)
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Recreational vessel owners / users are again more likely to reside in the upper North Island in 2019, with 34% living in the Auckland region (vs. 37% in 2018). While there has hardly been any change between 2019 and 2017 in the Waikato region (10% in 2019 vs. 9% in 2018), there has also been little variation in the Wellington / Wairarapa region with regard to where boaties live (9% in both 2019 and 2018). In the South Island regions, the recreational boating community is again the largest in Canterbury / West Coast (14% in 2019 vs. 12% in 2018), followed by Otago (5% in both years).

AGE

In 2019 there has been a marginal decrease in recreational boaties aged 35 years or older



Q1: Which of the following age groups are you in?
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)
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The number of middle-aged recreational boaties has remained stable over the past three years with a marginal decrease in 2019 (47% in 2019 vs. 49% in 2018).

To what regions do they mostly take their recreational vessel?

While recreational vessel users have continued to stay fairly close to the area they live when boating, Auckland boaties have again travelled into three other regions to enjoy the water (e.g. Northland, Waikato / Taupō, and the Bay of Plenty). Most boaties in comparison have tended to venture into only one or two additional regions during the previous 12 months.

REGION LIVED – BY REGION WHERE GO BOATING

The trend of boating close to home has continued in 2019. Auckland boaties tend to venture slightly more into other regions

		Region live in										
		Northland	Auckland	Waikato / Taupō	Bay of Plenty	Taranaki	Manawatu-Whanganui	Wellington / Wairarapa	Canterbury / West Coast	Tasman / Nelson / Marlborough	Gisborne / Hawke's Bay	Otago / Southland
Base, n=		32*	319	92	81	20*	35*	77	125	26*	39*	54
Region go boating	Northland	90%	22%									
	Auckland	10%	82%	14%								
	Waikato / Taupō	11%	11%	80%	15%	11%	22%	15%			18%	
	Bay of Plenty		11%	34%	94%	10%		10%			15%	
	Gisborne										23%	
	Hawke's Bay						13%				42%	
	Taranaki					82%						
	Manawatu-Whanganui						75%					
	Wellington / Wairarapa						14%	73%				
	Tasman									47%		
	Nelson									56%		
	Marlborough					11%			14%	57%		
	Canterbury / West Coast								85%	10%		11%
Otago								13%			61%	
Southland											21%	

Q4: In which of the following regions do you normally live? / Q16: Sometimes people go boating away from home. In which regions do you usually go boating?
 Base: NZers 18+ recreational boating owners / users (n=900). *Caution: Low base. Note: Only 10% and higher displayed in the above table.
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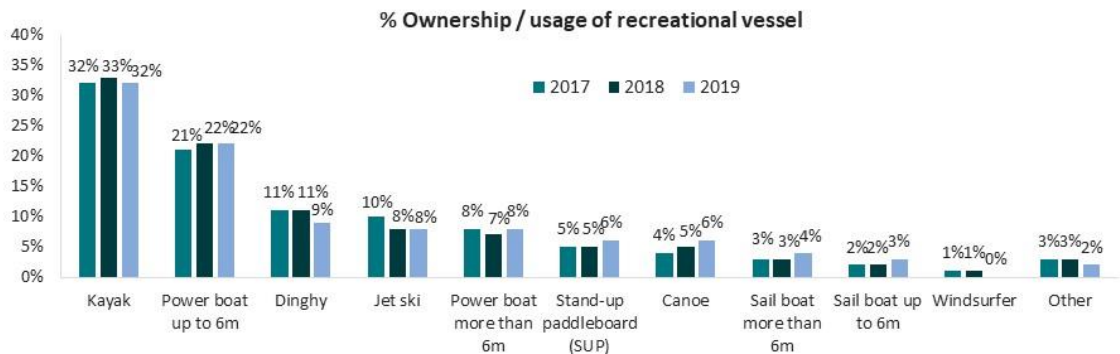
Note: Responses for some regions were grouped, as base sizes were too low to look at individual regions. Percentages below 10% not shown.

Type of Recreational Vessel Owned / Used

Kayaks are once again the most popular form of recreational vessel owned or used by boaties in New Zealand in 2019. Ownership / usage of this type of small craft has remained stable at 32% in 2019 and 33% in 2018.

OWNERSHIP / USAGE OF RECREATIONAL VESSEL

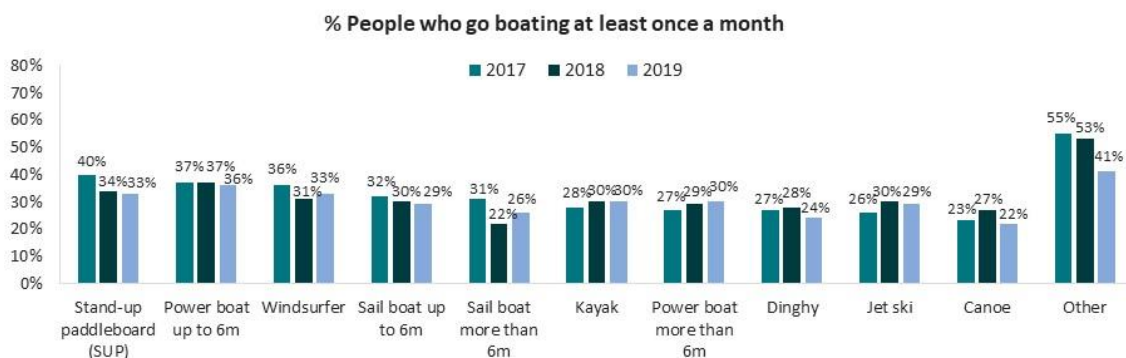
Kayaks, power boats under 6m & dinghies are again the top-3 most commonly used / owned recreational vessels



Q14: Which one of these vessels do you use the most frequently? (single response)
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)
 Note: In this survey and this report, a dinghy refers to a vessel which is small and / or inflatable and also powered only by oars. A dinghy with a motor has been classified as a power boat up to 6 metres.
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PERCENTAGE OF PEOPLE WHO GO BOATING AT LEAST ONCE A MONTH
While boating frequency has decreased amongst users of SUPs, dinghies & canoes, it has risen amongst users of sail boats over 6m



Q11: These next few questions are about your 'normal' boating habits. When you are most active, for example during summertime, how often do you go out on the vessels listed below? (this does not include any commercial boating or charter boat operations)

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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The most notable increase in monthly boating usage in 2019 is evident amongst those venturing out on sail boats more than 6 metres long (26% in 2019 vs. 22% in 2018). Any other increases are limited to changes of only one or two percentage points (i.e. windsurfers and power boats over 6 metres). *Better weather, more available time, and having more opportunities with family / friends* are cited by these types of recreational boaties as key driving factors behind this increase in use. Although they are only incremental, both dinghies³ (24% in 2019 vs. 28% in 2018) and canoes (22% in 2019 vs. 27% in 2018) have seen respective decreases of 4 and 5 percentage points in their 'normal' recreational use in 2019. Boaties using these types of vessels indicate *having less time, fewer opportunities with family / friends, and changes in personal interests* as the top-three reasons for not going out on the water as much in 2019.

Change in boating frequency

SUP and large (6m+) sail boat owners / users have increased their boating trip frequency the most during the past 12 months (20% and 16% respectively), while for canoeists and windsurfers it has decreased more than for any other boaties (47% and 44% respectively). The majority of boaties report that their trip frequency has stayed fairly close to levels in 2017–18.

³ As noted in the Background section of the 2019 report (page 5), when dinghies are referred to in the main body of the report, this refers to both powered *and* unpowered dinghies. Please see pages 43-46 of this report for a new and more detailed analysis of small-powered vessels which includes results for boaties who reported that the main vessel they own, use or spend time on is a dinghy that at least 'sometimes' uses a motor.

CHANGE IN BOATING FREQUENCY IN LAST 12 MONTHS

SUP & sail boat (6m+) owners / users have increased their boating trip frequency the most, while canoeists' & windsurfers' frequency has decreased the most

Vessel own / use	Power boat up to 6m	Power boat more than 6m	Sail boat up to 6m	Sail boat more than 6m	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)	Windsurfer
Base, n=	419	227	148	144	270	379	572	270	260	90
↑ Frequency	14%	15%	11%	▲16% (8%)	13%	9%	13%	10%	20%	9%
↓ Frequency	43%	41%	43%	42%	41%	43%	40%	47%	32%	44%
▬ Frequency	44%	44%	46%	42%	46%	48%	46%	43%	48%	47%

Q20a: Thinking about the last 12 months (May 2018 to April 2019), how has your frequency of boating trips changed, compared to the 2017-18 period beforehand?

Base: NZers 18+ recreational boating owners / users (n=900)

© 2019 Ipsos. ▲ Significantly higher / ▼ Significantly lower compared to 2018 ()

GAME CHANGERS



Note: This question was not asked in the 2017 survey.

REASONS FOR INCREASE IN FREQUENCY OF VESSEL USAGE

Top-3 reasons

More opportunities with friends / family, better weather & more time were the top-3 factors influencing an increase in trip frequency

Power boat up to 6m	Power boat more than 6m	Sail boat (any size)	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)
n=56	n=35*	n=29*	n=35*	n=34*	n=76	n=27*	n=52
Better weather (46%)	Better weather (61%)	Better weather (58%)	Better weather (61%) [37%]	Better weather (31%)	Better weather (36%)	More time (43%)	Better weather (36%)
More opportunities with friends / family (41%)	More opportunities with friends / family (56%) [29%]	More time (45%)	More opportunities with friends / family (44%)	More time (24%)	More opportunities with friends / family (31%)	Better weather (33%)	More opportunities with friends / family (26%)
More time (39%)	More time (33%)	More opportunities with friends / family (36%)	More time (38%)	Easier to organise (23%)	More time (22%)	Easier to organise (29%)	More time (22%)

Q20b: For what reasons has your usage of <vessel> become more / less frequent or stayed about the same?

Base: NZers 18+ recreational boating owners / users whose frequency of usage for the mentioned vessels has increased. *Caution: Low base. Note: Base too low to look at Windsurfers.

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▲ Significantly higher / ▼ Significantly lower compared to 2018 []

GAME CHANGERS

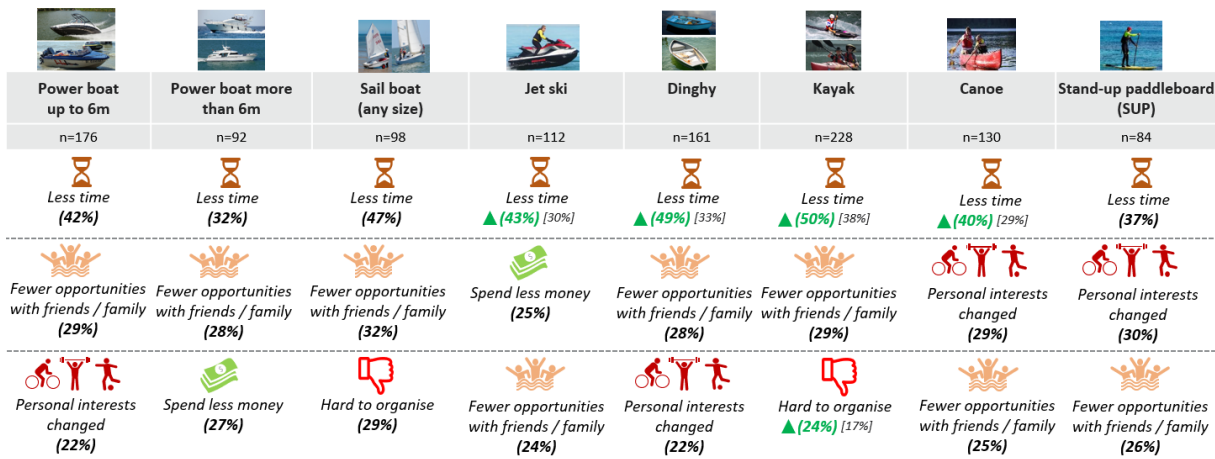


Note: This question was not asked in the 2017 survey.

Top-3 reasons

REASONS FOR DECREASE IN FREQUENCY OF VESSEL USAGE

Less time, fewer opportunities with friends / family & personal interests changing were the top-3 factors influencing a decrease in trip frequency



Q20b: For what reasons has your usage of <vessel> become more / less frequent or stayed about the same?

Base: NZers 18+ recreational boating owners / users whose frequency of usage for the mentioned vessels has decreased. Note: Base too low to look at Windsurfers.

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▲ ▼ Significantly higher / lower compared to 2018 []

GAME CHANGERS



Note: This question was not asked in the 2017 survey.

In terms of change in boaties' time on the water in recent years, respondents were again asked why their usage of vessels had become more / less frequent or stayed about the same. *Better weather, more opportunities with friends / family, and more available time* are the top-three factors influencing an increase in vessel usage. *Better weather* is the number-one factor leading to increased usage in all but one vessel categories (canoe). The top-three factors leading to a decrease in vessel usage are reportedly *having less time, fewer opportunities with friends / family, and personal interests changing*.

Demographic differences by type of recreational vessel use

As in previous years, there are numerous significant demographic differences when comparing recreational vessel use across New Zealand in 2019.

OWNERSHIP / USAGE OF RECREATIONAL VESSELS

Significant demographic differences are again apparent in 2019

	Power boat (6m or less) (n=197)	Power boat (6m or more) (n=68)	Sail boat (any size) (n=59)	Dinghy (n=81)	Kayak (n=293)	Canoe (n=55)	Jet ski (n=71)	Stand-up paddleboard (n=55)
Age	18-24 yrs (12% vs. 20%) 55+ yrs (36% vs. 25%) 65+ yrs (20% vs. 11%)	--	--	55-64 yrs (24% vs. 14%)	18-24 yrs (26% vs. 20%) 65+ yrs (6% vs. 11%)	45-54 yrs (27% vs. 15%)	18-24 yrs (36% vs. 20%) 25-34 yrs (35% vs. 21%) 55-64 yrs (4% vs. 14%)	--
Ethnicity	NZ European (87% vs. 71%) Māori (6% vs. 11%) Non-NZ European (13% vs. 29%)	--	--	Māori (22% vs. 11%) Chinese (0% vs. 5%)	--	--	NZ European (59% vs. 71%) Non-NZ European (41% vs. 29%)	--
Region	Wellington / Wairarapa (4% vs. 9%)	--	--	--	--	Wellington / Wairarapa (20% vs. 9%) Canterbury / West Coast (29% vs. 14%)	Waikato / Taupō (23% vs. 11%) Canterbury / West Coast (25% vs. 14%)	Auckland (52% vs. 34%)

Q5: Can you tell me if you own, skipper or use any of the following types of vessels? Please note this only includes vessels used for recreational / leisure purposes, not those used for commercial purposes or charter boat operations. / Q14: Which one of these vessels do you use the most frequently? (single response)

Base: NZers 18+ recreational boating owners / users (n=900). Note: Base too low to look at Windsurfers.

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Significantly higher / lower vs. Total is shown in green / red
-- No significant differences

GAME CHANGERS



Note: Responses for sail boats up to 6 metres long and sail boats more than 6 metres long were combined, as the base was too low to look at sail boats more than 6 metres long individually.



Other vessels owned, used, or spent time on

As in 2018, the current results show that owners / users of recreational vessels continue to own, use, or spend time on a range of other vessels, especially smaller craft such as kayaks and dinghies. SUP and jet ski owners / users are more likely to also own, use, or spend time on large power boats.

OWNERSHIP / USAGE OF RECREATIONAL VESSELS

Recreational vessels owners / users continue to spend time on a range of other vessels, especially smaller craft such as kayaks & dinghies

Most frequently used vessel

Other vessel type own / use / spend time on	Total recreational boaters	Power boat up to 6m	Power boat more than 6m	Sail boat (any size)	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)
Base, n=	900	197	68	59	71	81	293	55	55
Power boat up to 6m (20ft) long	47%	100%	48%	33%	48%	33%	29%	15%	24%
Power boat more than 6m (20ft) long	25%	29%	100%	13%	50%	15%	11%	9%	13%
Sail boat up to 6m (20ft) long	17%	16%	21%	61%	25%	13%	9%	6%	14%
Sail boat more than 6m (20ft) long	16%	12%	22%	76%	23%	16%	7%	7%	5%
Jet ski	31%	27%	29%	22%	100%	28%	24%	20%	15%
Dinghy	42%	42%	31%	52%	42%	100%	33%	31%	23%
Kayak	63%	48%	43%	46%	64%	40%	100%	37%	41%
Canoe	31%	18%	26%	25%	36%	24%	30%	100%	23%
Stand-up paddleboard (SUP)	29%	24%	20%	24%	45%	14%	25%	26%	100%
Other	3%	0%	0%	2%	1%	1%	1%	0%	2%

Q5: Can you tell me if you own, skipper or use any of the following types of vessels? Please note this only includes vessels used for recreational / leisure purposes, not those used for commercial purposes or charter boat operations. / Q14: Which one of these vessels do you use the most frequently? (single response)
 Base: NZers 18+ recreational boating owners / users (n=900). Note: Base too low to look at Windsurfers.

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Significantly higher vs. Total is shown in green
 Significantly lower vs. Total is shown in red

GAME CHANGERS

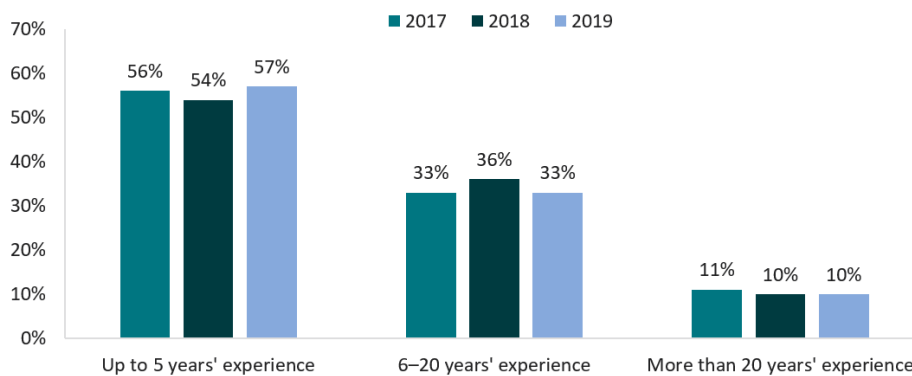


Boating experience, education courses, and membership

A third of recreational boaties in 2019 report having 6–20 years’ experience, which is a small decrease from 2018 (33% in 2019 vs. 36% in 2018). Like the two previous years’ reports, it is again evident that the average experience level amongst recreational boaties is continuing to decline over time.

BOATING EXPERIENCE

There was a marginal increase in the number of boaties with up to 5 years’ experience in 2019



Q15: For about how many years have you been regularly using each of the vessels below?
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,225, 2017 n=902)

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GAME CHANGERS

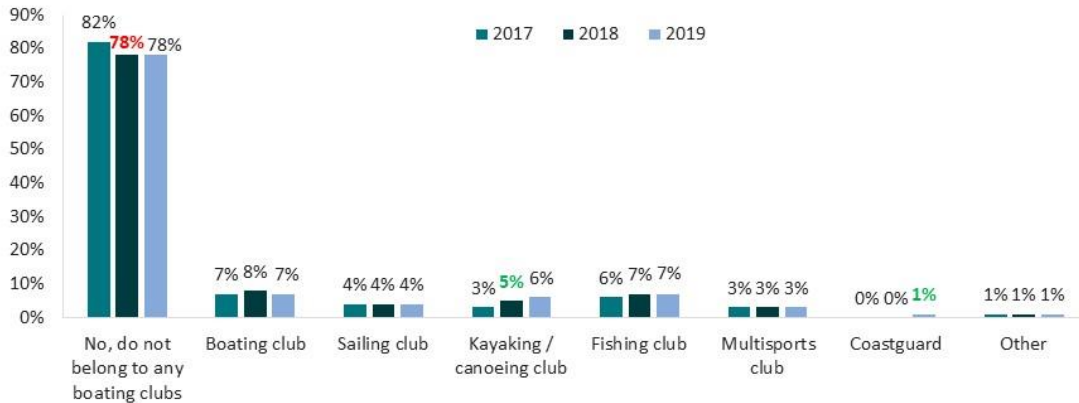


2019 Recreational Boating Participation Research

Since 2017, approximately eight out of 10 recreational boaties have reported they do not belong to any boating clubs. Following a significant increase in 2018, kayaking and canoeing clubs have seen another, albeit marginal, increase the current year (6% in 2019 vs. 5% in 2018 vs. 3% in 2017). The number of boaties who report they have never completed a formal boating education course is also very low with limited change since 2017 (81% in both 2019 and 2018 vs. 79% in 2017).

BOATING MEMBERSHIP

A clear majority of boaties do not belong to any types of boating associations or clubs which offer regular boating activities



Q7: Are you currently a member of any boating association, club, or clubs that regularly involve boating activities?
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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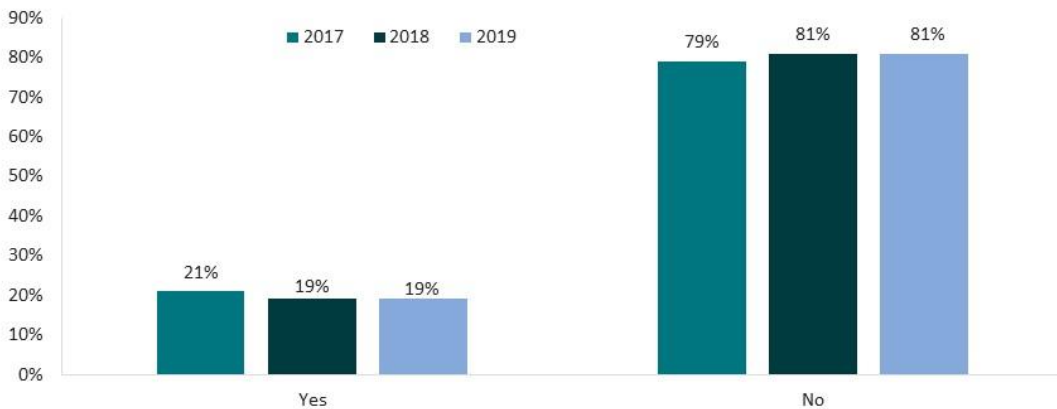
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 Significantly lower vs. previous wave is shown in red

GAME CHANGERS



BOATING EDUCATION COURSES

Only 1 in 5 boaties have completed formal boating education courses



Q8: Have you completed any formal boating education courses in New Zealand?
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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GAME CHANGERS

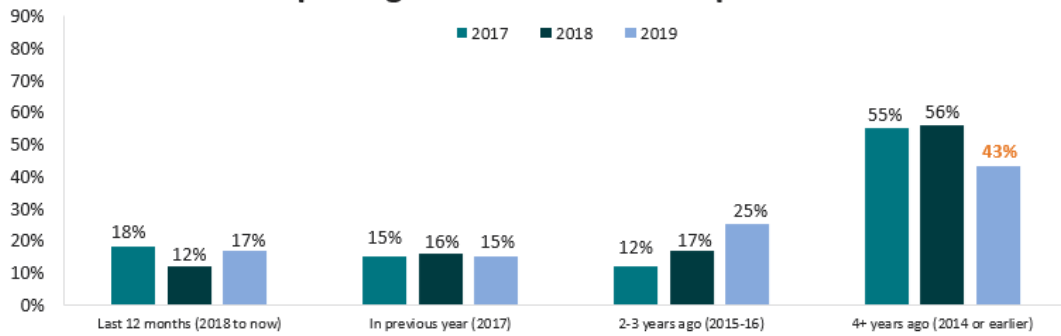


2019 Recreational Boating Participation Research

Less than a fifth of all boaties have completed their most recent boating education course during the past year. However, this number has increased versus 2018 (17% in 2019 vs. 12% in 2018). The majority report undertaking a course either in 2014 or earlier (43% in 2019 vs. 56% in 2018). Of those who have completed such a course, more indicate they have finished the Day Skipper course than any other available course (50% in 2019 vs. 55% in 2018).

BOATING EDUCATION COURSES

In 2019 there has been a significant decrease in the number of boaties who completed their most recent course four+ years ago, but also an increase in those completing a course within the previous 12 months*



* Not statistically significant but hopefully indicating a positive uptake.

Q9: When did you complete your most recent boating education course?

Base: NZers 18+ recreational boating owners / users (2019 n=163, 2018 n=225, 2017 n=187)

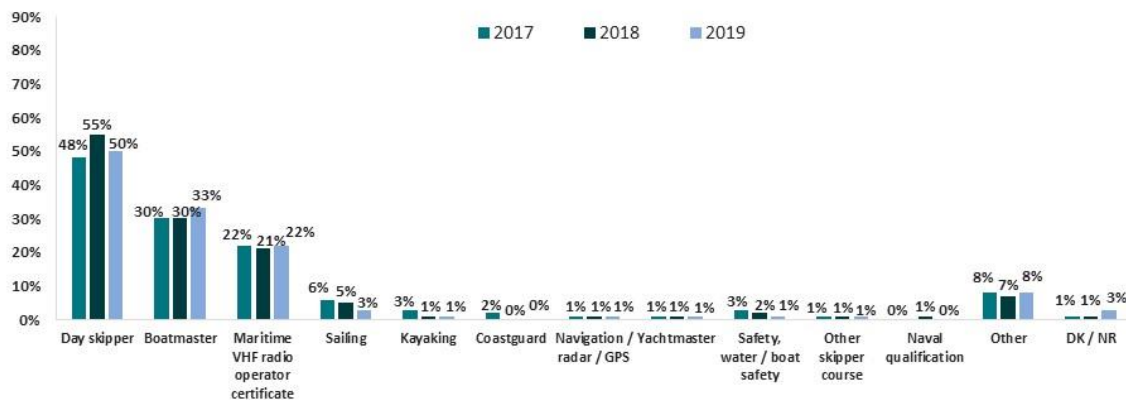
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GAME CHANGERS



BOATING EDUCATION COURSES

The day skipper course is the most completed course, followed by the boatmaster & radio operator courses



Q10a: What type of course did you complete / what was it called?

Base: NZers 18+ recreational boating owners / users who completed their most recent course (2019 n=163, 2018 n=225, 2017 n=187)

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Length of typical trip

The 2019 results indicate that the majority of recreational boaters enjoy spending 1–4 hours on a range of smaller vessels such as kayaks, canoes, SUPs, and jet skis, as they did the previous year. Fewer people going out on larger (6m+) power boats choose to go on trips that are either overnight or two or more days’ long – a significantly lower result compared to 2018 (9% in 2019 vs. 21% in 2018). Instead, these types of boaters report a preference this year for shorter excursions (i.e. 1–4 hours), which is a significant increase (37% in 2019 vs. 29% in 2018). These differences may have been influenced by the increase in fuel costs seen across New Zealand in 2018.

LENGTH OF TIME OF A TYPICAL TRIP

As in 2018, the majority of boaters spend 1–4 hours on other vessels. Power boats remain the vessel of choice for longer excursions

		Vessel own / use										
		Power boat up to 6m	Power boat more than 6m	Sail boat up to 6m	Sail boat more than 6m	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddle-board (SUP)	Wind-surfer	Other
Boating time typical trip	Base, n=	419	227	148	144	270	379	572	270	260	90	26*
	Less than one hour	12%	10%	18%	19%	35%	35%	25%	36%	43%	40%	15%
	1 to 4 hours	42%	37%	45%	36%	48%	50%	65%	51%	47%	45%	56%
	4 hours to a day	43%	43%	31%	25%	14%	13%	9%	9%	7%	11%	15%
	Overnight / 2 days or more	3%	9%	6%	20%	3%	2%	2%	4%	3%	3%	14%

Q12: On average, how long would a typical trip on each of the vessels that you use take?

Base: NZers 18+ recreational boating owners / users (n=900). *Caution: Low base.

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GAME CHANGERS

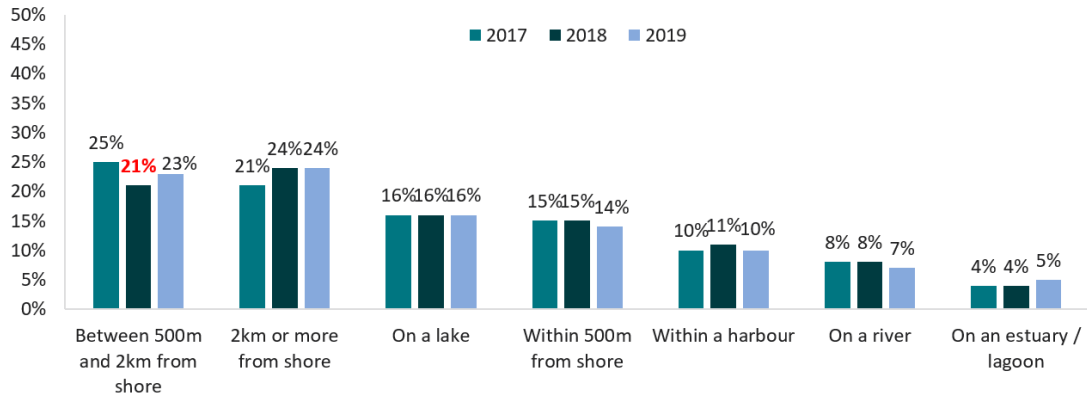


2019 Recreational Boating Participation Research

As in 2018, the most frequent excursions undertaken this year are two kilometres or more from shore (24% in both 2019 and 2018). The trend of going on very similar boating trips each year has continued; there are no significant differences seen between 2019 and 2018.

WHERE GO ON A NORMAL TRIP

2019 has seen very little changes in where boaties choose to go on a normal trip



Q17: When you are on a normal trip on a <VESSEL SELECTED IN Q14>, where do you mainly go?

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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Significantly lower vs. previous wave is shown in red

GAME CHANGERS



When analysed by boat type, the greatest distance travelled in 2019 is two or more kilometres from shore by power and sail boat owners / users. This is significantly higher both compared to other boat owners / users and to the previous year as shown in the table below.

WHERE GO ON A NORMAL TRIP – BY VESSEL OWNED / USED

Power & sail boats continue to venture out 2km or more from the shore



Where do you go on a normal trip	Total recreational boaters	Vessel own / use							
		Power boat up to 6m	Power boat more than 6m	Sail boat (any size)	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)
Base, n=	900	197	68	59	71	81	293	55	55
2km or more from shore	24%	42%	70%	37%	20%	15%	8%	5%	16%
Between 500m and 2km from shore	23%	31%	14%	25%	32%	20%	22%	13%	17%
Within 500m from shore	14%	4%	0%	7%	11%	10%	19%	17%	34%
Within a harbour	10%	8%	5%	17%	7%	20%	10%	5%	9%
On a lake	16%	12%	4%	9%	28%	21%	18%	27%	15%
On an estuary / lagoon	5%	2%	0%	1%	0%	10%	9%	16%	7%
On a river	7%	2%	5%	0%	3%	4%	14%	16%	0%

Q17: When you are on a normal trip on a <VESSEL SELECTED IN Q14>, where do you mainly go?

Base: NZers 18+ recreational boating owners / users (n=900). Note: Base too low to look at Windsurfers.

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Significantly lower vs. Total is shown in red

GAME CHANGERS

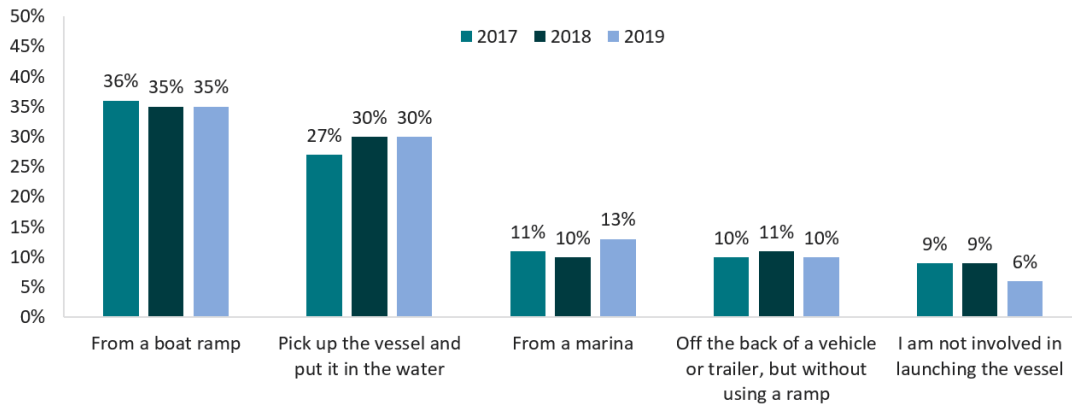


Vessel launch

Boat ramps and putting vessels straight into the water are still the most popular forms of launch, with no change between 2019 and 2018 (from a boat ramp: 35% in both 2019 and 2018; pick up vessel and put in water: 30% in both 2019 and 2018). When analysed by vessel type, larger vessels are still usually launched from a marina or boat ramp, as would be expected.

WHERE USUALLY LAUNCH VESSEL

While vessels are still being primarily launched from a ramp or put directly into water, there has been a marginal increase in marina-based launches in 2019



Q18: How do you usually launch the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)
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WHERE USUALLY LAUNCH VESSEL – BY VESSEL OWNED / USED

Larger vessels continue to be usually launched from a marina & boat ramp



How do you usually launch the vessel	Vessel own / use								
	Total recreational boaters	Power boat up to 6m	Power boat more than 6m	Sail boat (any size)	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)
Base, n=	900	197	68	59	71	81	293	55	55
From a marina	13%	12%	42%	44%	8%	4%	6%	4%	4%
From a boat ramp	35%	74%	43%	36%	51%	32%	16%	15%	11%
Off the back of a vehicle or trailer, but without using a ramp	10%	9%	4%	6%	27%	29%	6%	10%	0%
Pick up the vessel and put it in the water	30%	1%	1%	2%	6%	22%	60%	37%	68%
Beach	2%	0%	0%	0%	1%	1%	2%	2%	9%
Mooring	0%	0%	1%	5%	0%	0%	0%	0%	0%
River / riverbank	0%	0%	0%	0%	0%	0%	1%	4%	0%
Other	0%	0%	0%	2%	0%	2%	0%	0%	2%
I am not involved in launching the vessel	6%	4%	8%	5%	7%	9%	5%	21%	5%
Don't know	2%	0%	0%	2%	0%	0%	3%	5%	2%

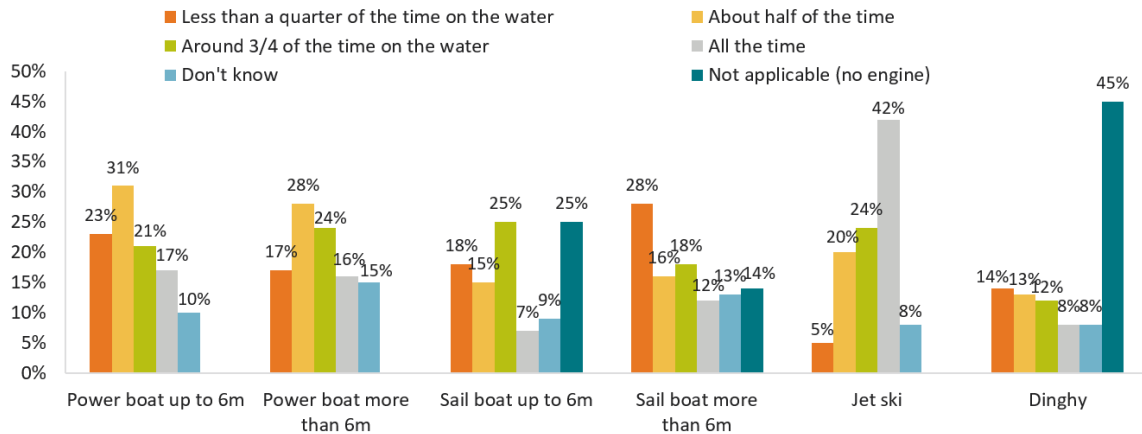
Q18: How do you usually launch the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / users (n=900). Note: Base too low to look at Windsurfers.
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In 2019, 86% of jet skiers report using their engine for at least half their trip through to the entire time they are out on the water (vs. 80% in both 2018 and 2017). Owners / users of power boats up to 6 metres also indicate an increase in their level of engine use this year. These types of boaties have also been increasing their engine use year-on-year (69% in 2019 vs. 66% in 2018).

ENGINE USE

Jet ski owners / users continue to have their engines running for most of the trip's duration



Q13: On average, for how long would you be using your vessel's engine on these trips?
 Base: NZers 18+ recreational boating owners / users (n=681*). *Note: Lower base as asked only for powered vessels.
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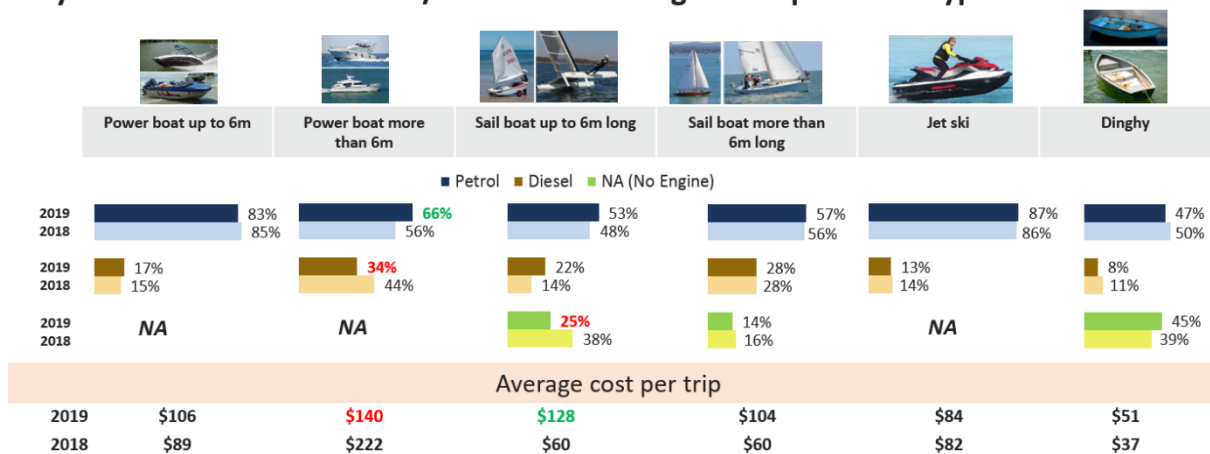


Fuel spend and preferred type

With the exception of owners / users of power boats over 6 metres, all have spent more money on fuel on average per trip in 2019 than the previous year, which reflects the substantial rise in fuel costs experienced by consumers over the last 12 months. Owners / users of the largest type of power boat understandably spend the most money on fuel per trip compared to other types of boaties – \$140 (though significantly lower vs. \$222 in 2018) – followed by owners / users of sail boats up to 6 metres (\$128 in 2019 vs. \$60 in 2018 – a significant increase) and owners / users of power boats up to 6 metres (\$106 in 2019 vs. \$89 in 2018). In terms of fuel type, petrol is very clearly preferred over diesel again, and like last year, it has been used by at least 50% for five out of the six vessel types which can be operated with an engine. Additionally, owners / users of power boat boats over 6 metres report a significant increase in their petrol use in 2019 compared to the previous year (66% in 2019 vs. 56% in 2018).

FUEL CONSUMPTION

Larger power boat owners / users have spent the most on fuel in 2019, followed by smaller sail boat owners / users. Petrol is again the preferred type



Q13b: On average, how much would you spend on fuel each time you use your boat(s), and what fuel do you use?
 Base: NZers 18+ recreational boating owners / users (n=681*). *Note: Lower base as asked only for powered vessels.
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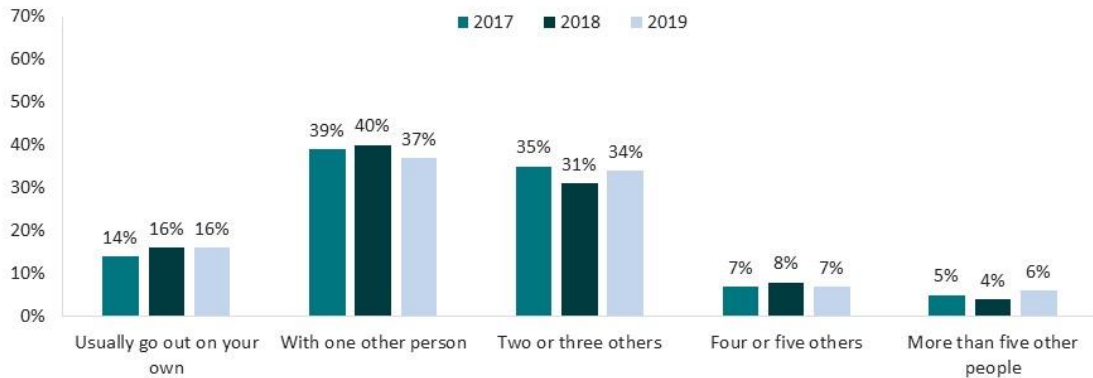
Note: This question was not asked in the 2017 survey.

Who they go with

As in 2018, the majority of recreational boaties elect to go out on the water with at least one person or a number of other people (84% in 2019 vs. 83% in 2018). In addition to the below, those owning or using power boats of over 6 metres are significantly more likely to go out with 2–3 people (53%), 4–5 people (17%), or groups of five or more passengers (14%); those venturing out on dinghies are significantly more likely to go out with just one other person (50% in 2019).

HOW MANY OTHER PEOPLE NORMALLY GO ON VESSEL

A clear majority are still choosing to go boating with other people

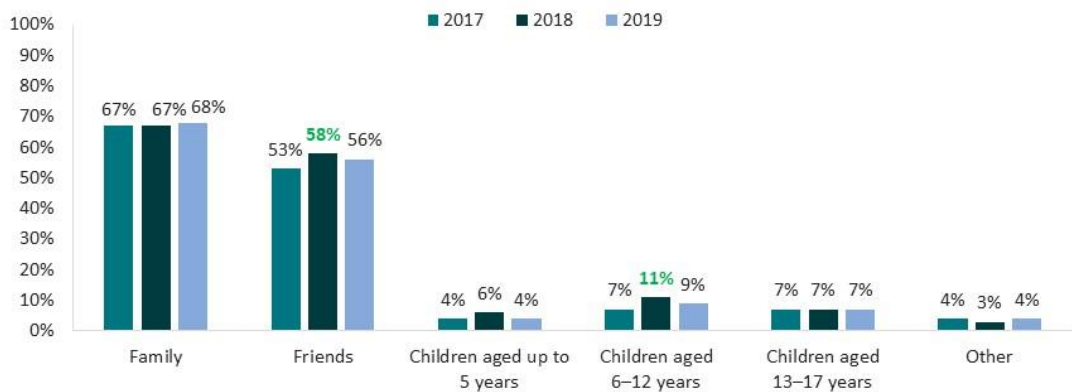


Q19: When you go out on the <VESSEL SELECTED IN Q14>, how many other people normally go with you?
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)
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WHO USUALLY GO WITH

Trends are very similar to 2018



Q20: Who do you usually go with on these trips on the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / users who don't go alone (2019 n=751, 2018 n=1,034, 2017 n=768)
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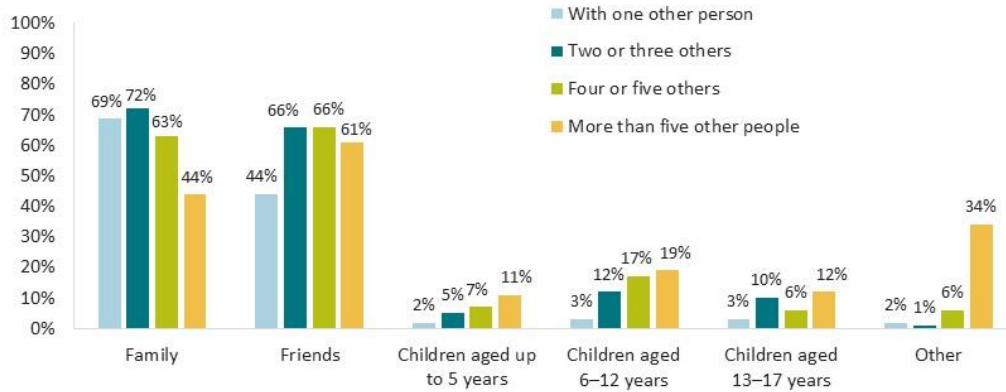


Although family and friends continue to be the most common type of passengers in 2019, the number of friends joining boat owners / users has decreased slightly following a significant increase in 2018 (56% in 2019 vs. 58% in 2018). Young passengers aged 6–12 years most frequently go out on excursions where there are either 4–5 other people on board (17%) or more than five other passengers

2019 Recreational Boating Participation Research

(19%). In 2019, family (73%) and 6-12-year-old children (9%) are regularly taken on power boats (up to 6m), while friends are also popular passengers when going out on dinghy excursions (50%).

WHO USUALLY GO WITH / HOW MANY OTHER PEOPLE NORMALLY GO ON VESSEL Fewer children have joined groups of 4–5 passengers on board in 2019



Q19: When you go out on the <VESSEL>, how many other people normally go with you? / Q20: Who do you usually go with on these trips on the <VESSEL>?
Base: NZers 18+ recreational boating owners / users who don't go alone (n=751)

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WHO USUALLY GO WITH – BY VESSEL OWNED / USED Significantly fewer family members joined boaties on larger power boats in 2019

	Vessel own / use								
	Total recreational vessels	Power boat up to 6m long	Power boat more than 6m long	Sail boat (any size)	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)
Base, n=	751	186	67	55	56	67	233	42	33*
Family	68%	73%	54%	61%	65%	61%	73%	69%	51%
Friends	56%	56%	62%	52%	62%	50%	56%	43%	62%
Children aged up to 5 years	4%	5%	8%	2%	4%	8%	4%	0%	0%
Children aged 6–12 years	9%	9%	9%	7%	13%	6%	12%	4%	0%
Children aged 13–17 years	7%	7%	4%	3%	8%	4%	7%	11%	9%
Other	4%	1%	10%	9%	2%	4%	4%	4%	6%

Q20: Who do you usually go with on these trips on the <VESSEL SELECTED IN Q14>? (multiple responses)

Base: NZers 18+ recreational boating owners / users who don't go alone (n=751). *Caution: Low base. Note: Base too low to look at Windsurfers.

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Attitudes to Boating Safety

Overall Boating Behaviour

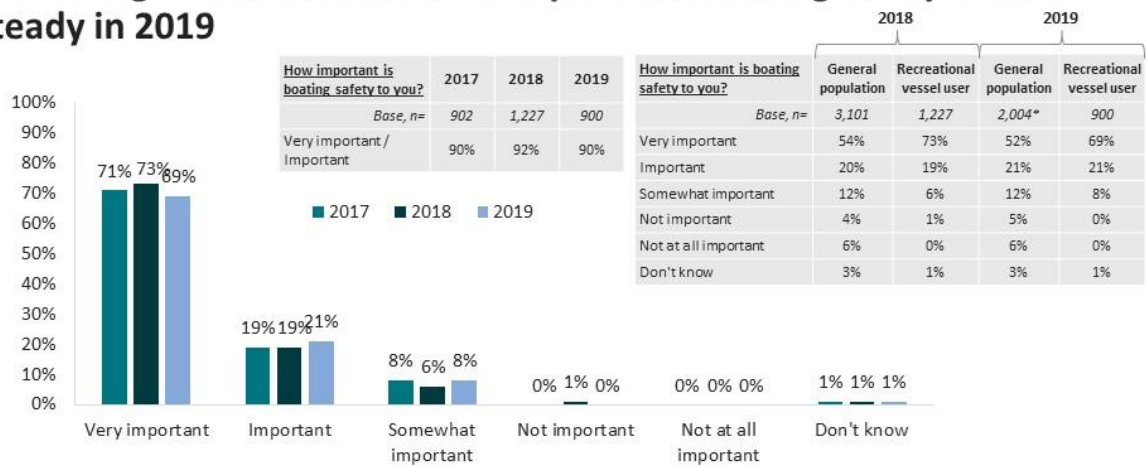
The four key risk factors identified and targeted by the Safer Boating Forum are:

- 1) Failure to wear lifejackets all the time;
- 2) Inability to communicate for help when an accident happens;
- 3) Failure to check the weather forecast before going out;
- 4) Alcohol use.

The Safer Boating Forum emphasises these four risk factors and skipper responsibility. The 2019 research indicates that the general population continues to see overall boating safety as important (73% in 2019 vs. 74% in 2018), with recreational vessel owners / users again feeling personally stronger about boating safety (90% in 2019 vs. 92% in 2018). However, in 2019, only 69% of boaties consider it 'very important' compared to 73% in 2018.

BOATING SAFETY IMPORTANCE

The strength of conviction around personal boating safety remains steady in 2019



Q35A: How important is boating safety to you personally?
 Base: NZers 18+: Recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902), General population (2019 n=2,004*, 2018 n=3,101, 2017 n=2,122).
 *Note: A small number of respondents did not answer Q35A in 2019.

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In 2019, 90% of recreational vessel owners / users claim that overall boating safety is important to them personally (vs. 92% in 2018). This year's result indicates that there have been very small decreases in attitudes towards boating safety amongst owners / users of larger (6m+) power boats (93% in 2019 vs. 96% in 2018), power boats up to 6m (92% in 2019 vs. 94% in 2018), and dinghies (94% in 2019 vs. 97% in 2018).



BOATING SAFETY IMPORTANCE – BY VESSEL OWNED / USED

9 out of 10 boaties consider boating safety important



Vessel own / use	Total recreational boaters	Power boat up to 6m	Power boat more than 6m	Sail boat (any size)	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)
Base, n=	900	197	68	59	71	81	293	55	55
Boating safety									
Important / Very important	90%	92%	93%	89%	90%	94%	88%	88%	91%
Very important	69%	75%	73%	65%	70%	84%	62%	69%	63%
Important	21%	17%	21%	24%	20%	10%	26%	19%	29%
Somewhat important	8%	6%	7%	10%	10%	5%	9%	7%	9%
Not important	0%	0%	0%	0%	0%	1%	1%	0%	0%
Not at all important	0%	0%	0%	0%	0%	0%	1%	2%	0%
Don't know	1%	2%	0%	2%	0%	0%	2%	4%	0%

Q35A: How important is boating safety to you personally?

Base: NZers 18+ recreational boating owners / users (n=900). Note: Base too low to look at Windsurfers.

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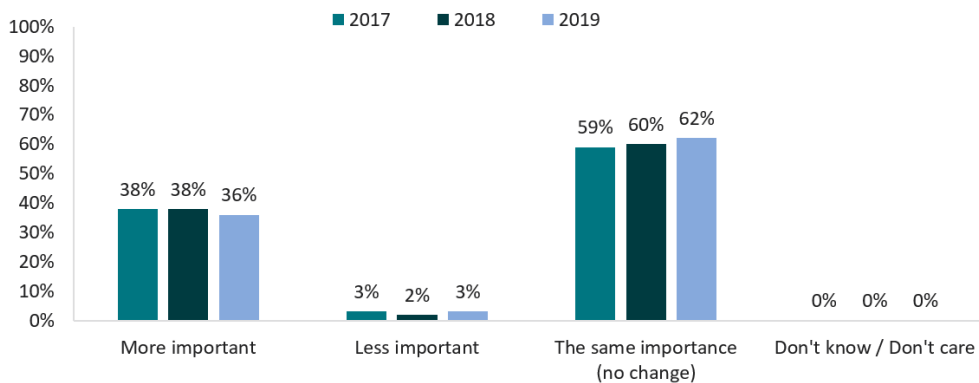
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The importance of general boating safety has remained largely unchanged among recreational boaties in 2019 compared to the previous two years. Dinghy owners / users indicate it has become even more important than in 2018, and this result is significant (84% in 2019 vs. 80% in 2018).

BOATING SAFETY IMPORTANCE VS. LAST YEAR

Trends in general boating safety are very similar to the previous two years



Q35B: Compared to how you felt a year ago, is general boating safety more important to you, less important to you, or about the same?

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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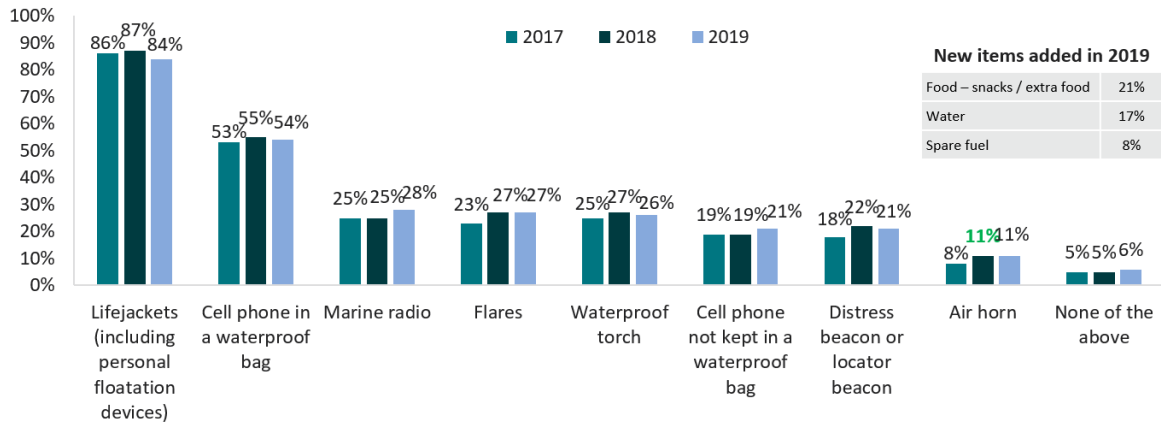


2019 Recreational Boating Participation Research

Like last year, lifejackets continue to be the most common form of safety device taken on board (84% in 2019 vs. 87% in 2018). There is a slight increase in the number of boaties taking marine radios on recreational trips (28% in 2019 vs. 25% in both 2018 and 2017). Respondents also take additional items such as food (i.e. snacks) (21%), water (17%), and spare fuel (8%) when going out on the water⁴.

WHAT BOATIES NORMALLY TAKE

Lifejackets continue to be the most prevalent form of safety device taken, while slightly more boaties are taking marine radios



Q21: When you go on recreational trips on the <VESSEL SELECTED IN Q14>, which, if any, of the following do you normally take with you or ensure is on the boat?

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902). Note: 'Don't know' answers not charted.

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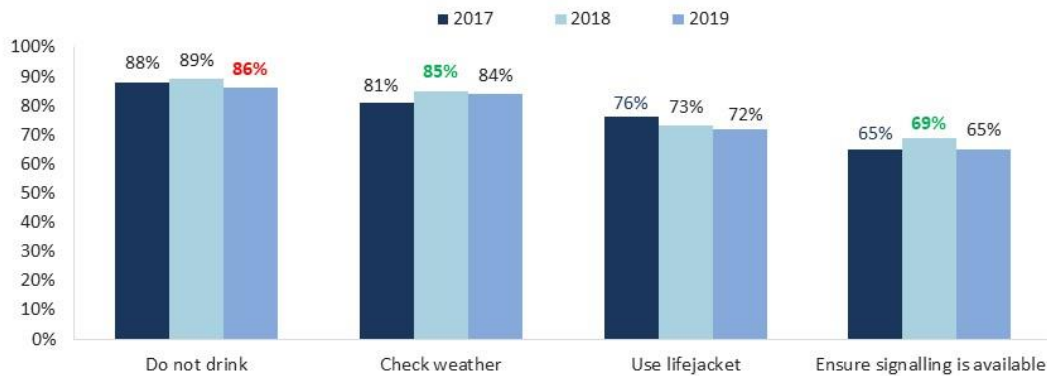
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Significantly lower vs. previous wave is shown in red

GAME CHANGERS



HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD

There is a significant decrease in the proportion of boaties who don't drink when using a vessel



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902). Note: % don't add up to 100% as 'Don't know' / 'Not applicable' not included in chart.

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Significantly lower vs. previous wave is shown in red


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While there is a significant decrease in the proportion of non-drinkers this year (86% in 2019 vs. 89% in 2018), there is also a decrease in boaties who make sure there are at least two ways that they are able to call or signal for help (65% in 2019 vs. 69% in 2018). Weather-checking and lifejacket use have remained stable.

⁴ These items were new options for this question in 2019. Other new options included clothing, alcoholic beverages, and first-aid kits. These particular items were not included in the chart above, as they had very low percentages (i.e. 2% or less).

WHAT BOATIES NORMALLY TAKE – BY VESSEL OWNED / USED



Vessel own / use	Total recreational boaters	Power boat up to 6m	Power boat more than 6m	Sail boat (any size)	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)
Base, n=	900	197	68	59	71	81	293	55	55
Lifejackets (including personal floatation devices)	84%	95%	80%	81%	80%	89%	89%	77%	54%
Cell phone in a waterproof bag	54%	62%	47%	58%	61%	66%	50%	41%	38%
Cell phone not kept in a waterproof bag	21%	39%	47%	37%	20%	14%	8%	9%	2%
Marine VHF radio	28%	60%	62%	59%	19%	15%	7%	8%	0%
Distress beacon or locator beacon	21%	38%	51%	43%	18%	16%	6%	10%	5%
Flares	27%	53%	52%	49%	16%	28%	7%	21%	2%
Air horn	11%	14%	26%	24%	21%	8%	5%	11%	5%
Waterproof torch	26%	37%	41%	48%	19%	34%	15%	26%	5%
Food – snacks, extra food	21%	33%	27%	28%	7%	25%	18%	9%	0%
Water	16%	25%	21%	15%	5%	20%	17%	4%	0%
Fuel – spare fuel	8%	19%	10%	13%	1%	6%	2%	0%	0%
None of the above	6%	1%	4%	2%	1%	5%	6%	12%	34%
Don't know	2%	1%	3%	5%	5%	0%	2%	0%	4%

Q21: When you go on recreational trips on the<VESSEL SELECTED IN Q14>, which, if any, of the following do you normally take with you or ensure is on the boat?

Base: NZers 18+ recreational boating owners / users (n=900). Note: Base too low to look at Windsurfers.

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Significantly higher vs. Total is shown in green
Significantly lower vs. Total is shown in red

GAME CHANGERS



As in 2018, owners / users of power boats under 6 metres are once again significantly more likely to make sure they have all the safety devices asked about when they go out on the water except for air horns. These boaties (62%) and also dinghy owners / users (66%) are significantly more likely to carry a cell phone in a waterproof bag in 2019 compared to other boat owners / users (54%). The other large-vessel owners / users remain significantly more likely to carry a much wider range of safety devices than those operating smaller water-based crafts, which is not surprising given the differences in the types of excursions undertaken. SUP owners / users are, again, significantly more likely to carry none of the safety devices asked about (34%).

Emergency Communications

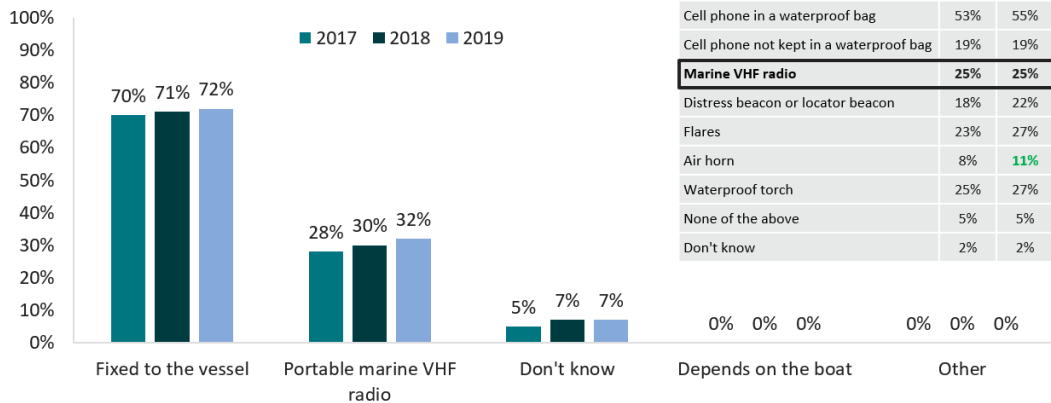
Maritime NZ recommends that recreational boaties carry at least two forms of communication that will work when they are wet. Maritime NZ also recommends that boat users check that the devices taken work in the area they are boating in.

The current research shows that fixed radios continue to be the most common form of marine VHF radio taken on board (72% in 2019 vs. 71% in 2018). Additionally, there has been a small increase in the number of boaties who indicate they normally take a marine VHF radio with them, which is a positive outcome in terms of safety equipment brought on trips (28% in 2019 vs. 25% in both 2018 and 2017) (see the ‘What do you ensure is on the boat?’ table overleaf).



MARINE RADIO

Fixed radios are again the most common form of marine VHF radio used in 2019



What do you ensure is on the boat?	2017	2018	2019
Base, n=	902	1,227	900
Cell phone in a waterproof bag	53%	55%	54%
Cell phone not kept in a waterproof bag	19%	19%	21%
Marine VHF radio	25%	25%	28%
Distress beacon or locator beacon	18%	22%	21%
Flares	23%	27%	27%
Air horn	8%	11%	11%
Waterproof torch	25%	27%	26%
None of the above	5%	5%	6%
Don't know	2%	2%	2%

Q27: Is your marine VHF radio fixed to the vessel, or is it a portable, waterproof radio that you carry or clip on? (multiple response)

Base: NZers 18+ recreational boating owners / users who have a marine radio (2019 n=247, 2018 n=306, 2017 n=226)

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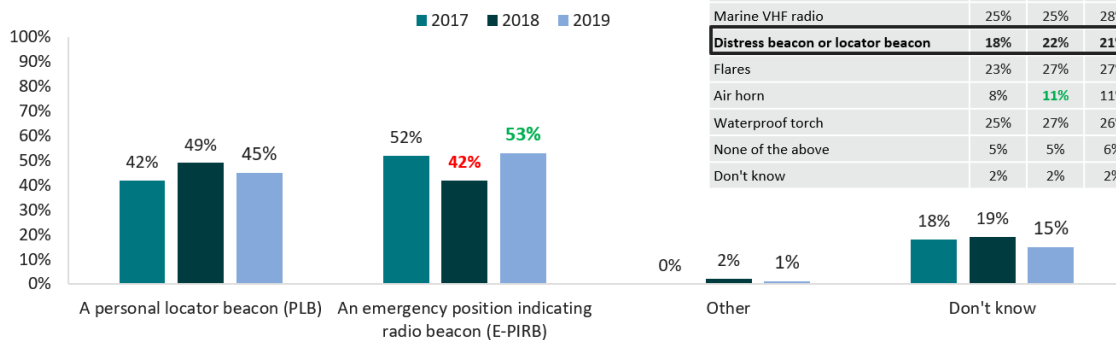
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Significantly lower vs. previous wave is shown in red

GAME CHANGERS



DISTRESS BEACON OR LOCATOR BEACON

Use of E-PIRBs has significantly increased in 2019 following a significant decrease the previous year



What do you ensure is on the boat?	2017	2018	2019
Base, n=	902	1,227	900
Cell phone in a waterproof bag	53%	55%	54%
Cell phone not kept in a waterproof bag	19%	19%	21%
Marine VHF radio	25%	25%	28%
Distress beacon or locator beacon	18%	22%	21%
Flares	23%	27%	27%
Air horn	8%	11%	11%
Waterproof torch	25%	27%	26%
None of the above	5%	5%	6%
Don't know	2%	2%	2%

Q28: What sort of distress beacon do you carry on board?

Base: NZers 18+ recreational boating owners / users who have a distress beacon or locator beacon (2019 n=186, 2018 n=258, 2017 n=167)

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Significantly lower vs. previous wave is shown in red

GAME CHANGERS

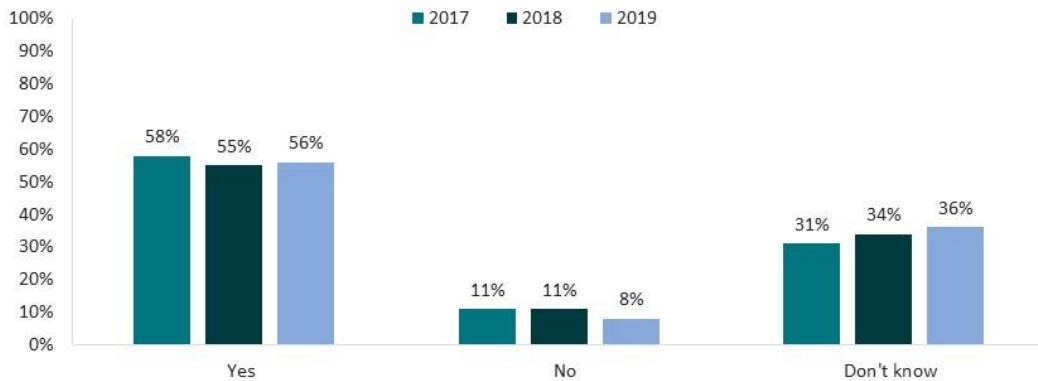


The percentage of those taking E-PIRBs has returned to the levels seen in 2017, following a significant decrease in 2018 (53% in 2019 vs. 42% in 2018 vs. 52% in 2017).



DISTRESS BEACON OR LOCATOR BEACON

Over 1 in 3 boaties are not aware whether the beacons used are registered



Q29: Is it registered?

Base: NZers 18+ recreational boating owners / users who have a distress beacon or locator beacon (2019 n=186, 2018 n=258, 2017 n=167)

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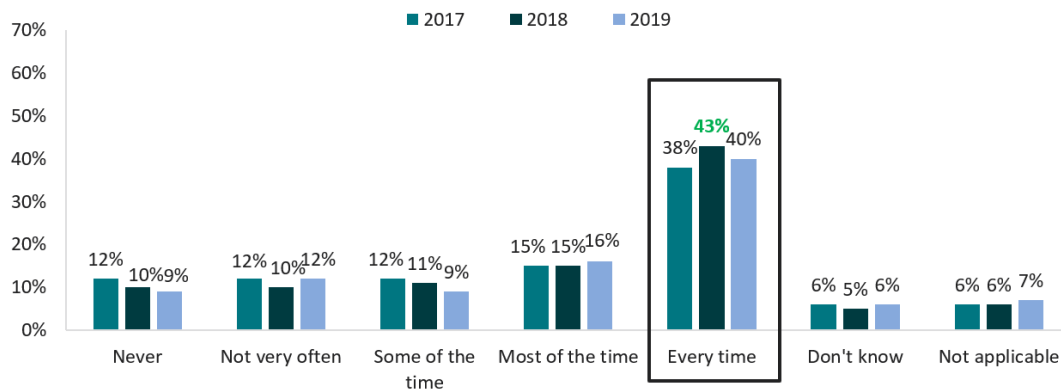
GAME CHANGERS



The issue of boaties' lack of awareness of the registration status of their beacons was highlighted in the 2018 Recreational Boating Participation Research report. Given that this trend has continued into the current year, the need to upskill recreational vessel owners / users about the legality and process associated with distress beacon registration is still important to emphasise.

HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD

There has been a marginal decrease in the number of boaties who make sure they have at least two ways to call / signal for help every time they go out on the water



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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Significantly lower vs. previous wave is shown in red

GAME CHANGERS



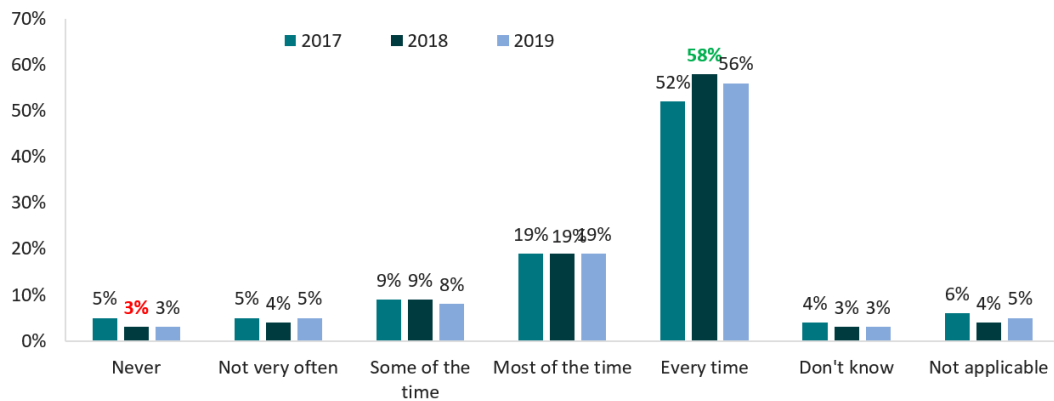
Following a significant increase in 2018, there has been a slight decrease in the number of boaties having at least two ways to either call or signal for help if needed 'every time' (40% in 2019 vs. 43% in 2018).



Weather Forecast

The percentage of boaters who say they check either the marine or mountain forecast ‘every time’ prior to excursions has also seen a very small decrease following a significant increase the previous year (56% in 2019 vs. 58% in 2018). An equal number have continued to maintain their weather-checking ‘most of the time’ (19% across all three years). Even with the aforementioned decrease, these overall results for the past three years indicate that forecast checking is becoming more habitual amongst a wider range of boat owners / users.

HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD 75% of boaters check the marine or mountain forecast before going out on the water



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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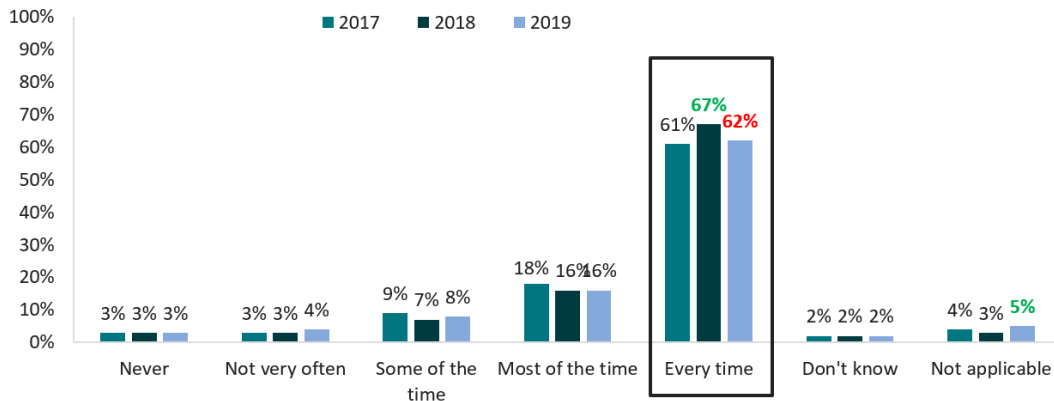
Those aged 55–64 (68%) are more likely to check the weather forecast before going out on the water compared to those 18–24 (49%) and 25–34 (49%). Similarly, those with 6–20 years’ experience of using a vessel (61%) and those with more than 20 years’ experience (64%) are more likely to check the marine forecast before going out on the water compared to those with up to 5 years’ experience (52%).

Alcohol Use

Alcohol avoidance either before or during time on the water ‘every time’ has significantly decreased compared to 2018 (62% in 2019 vs. 67% in 2018). The fact that alcohol avoidance before or during a trip ‘most of the time’ has remained stable is encouraging (16% in both 2019 and 2018).

HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD

There has been a significant decrease in the number of boaties who avoid alcohol before or during their boating trips every time



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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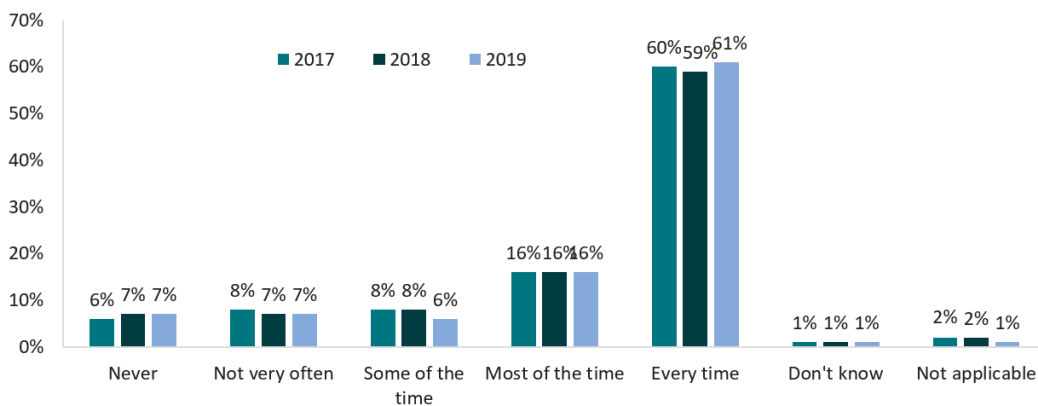


Lifejacket Behaviour

A clear majority of boaties indicate they wear a lifejacket for the whole duration of their boating trip 'every time' or 'most of the time', with the results again almost identical to the previous two years (combined 77% in 2019 vs. combined 75% in 2018). Over a quarter of boaties ensure they have five or more lifejackets stored on their vessel in 2019 (27% in 2019 vs. 25% in 2018).

HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD

77% of boaties wear a lifejacket the entire time they are on the water every time or most of the time



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

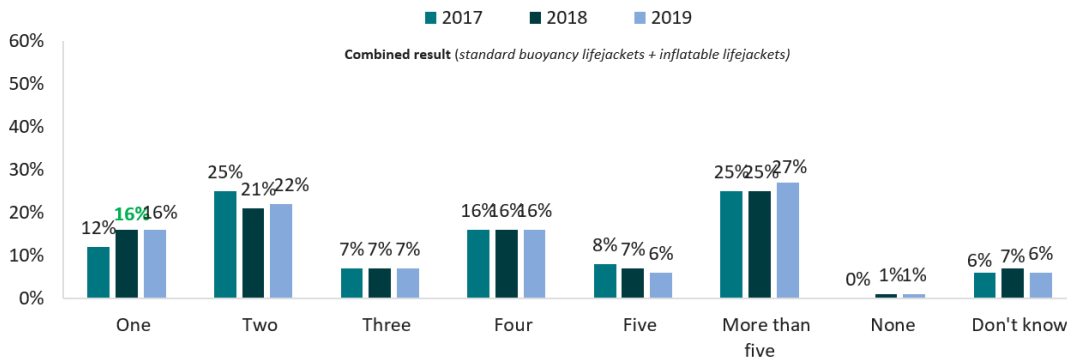
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LIFEJACKETS ON BOARD

Over a quarter of boaties have more than five lifejackets on board in 2019



Q22: How many standard buoyancy lifejackets are normally on these trips, and how many inflatable lifejackets?

Base: NZers 18+ recreational boating owners / users who are lifejacket users (2019 n=765, 2018 n=1,071, 2017 n=774)

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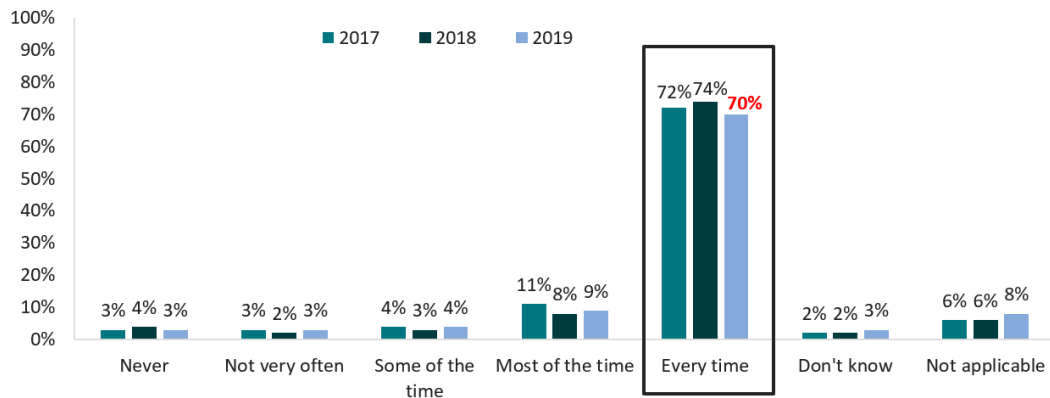
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Significantly lower vs. previous wave is shown in red

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HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD

There has been a significant decrease in the number of boaties who ensure there are enough lifejackets for all their passengers every time



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

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Significantly lower vs. previous wave is shown in red

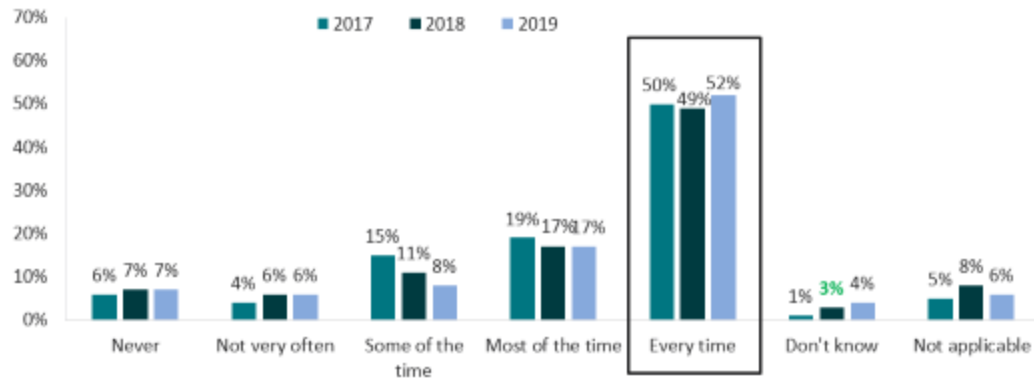
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In 2019 there has been a significant decrease in the number of boaties who say they ensure there are enough lifejackets to cater for all passengers 'every time' (70% in 2019 vs. 74% in 2018). It will be vital to monitor this behaviour even more closely in the year ahead given that this is one of the four key risk factors identified and targeted by the Safer Boating Forum.



HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD
The number of adult passengers wearing a lifejacket every time they go out on the water has increased



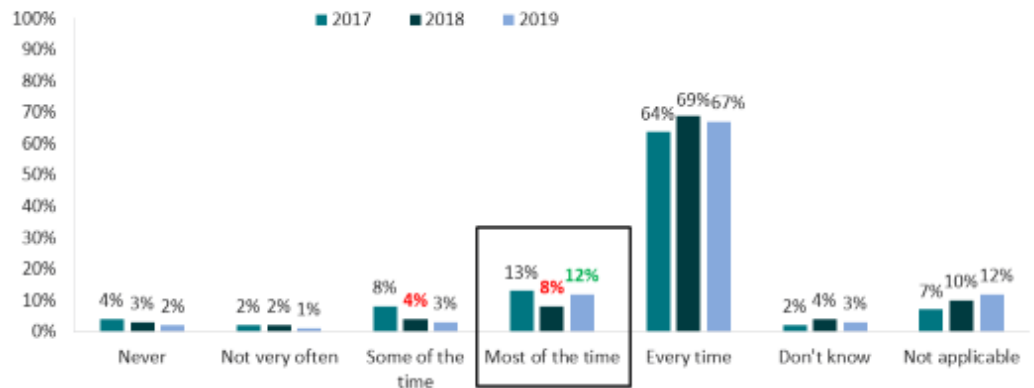
Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / regular skippers (2019 n=455, 2018 n=638, 2017 n=450)

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Significantly higher vs. previous wave is shown in green
 Significantly lower vs. previous wave is shown in red



HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD
There has been a significant increase in ensuring all child passengers wear a lifejacket most of the time they are on the water



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / regular skippers (2019 n=455, 2018 n=638, 2017 n=450)

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 Significantly lower vs. previous wave is shown in red

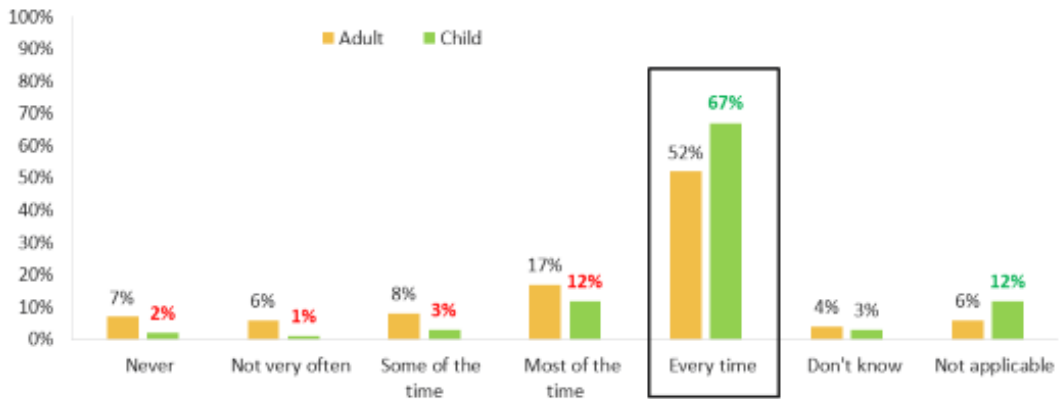


The number of adult passengers wearing a lifejacket the entire time they are on the water has increased slightly (52% in 2019 vs. 49% in 2018). The significant increase in the number of children who wear lifejackets ‘most of the time’ (12% in 2019 vs. 8% in 2018) in combination with a very similar result to last year for ‘every time’ is also very encouraging (67% in 2019 vs. 64% in 2017). Only 52% of adult passengers wear a lifejacket the entire time they are on the water compared to 67% of child passengers in 2019, and this result was significant.

Note that we did not ask respondents to differentiate if the children they regularly boated with were their own children.

HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD

Only 52% of adult passengers wear a lifejacket the entire time they are on the water compared to 67% of child passengers



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / regular skippers (n=455)

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Significantly higher vs. Adult passengers is shown in green
 Significantly lower vs. Adult passengers is shown in red
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HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD – BY VESSEL OWNED / USED

Regularly do each of the following things	Vessel own / use	Total recreational boaters	Power boat up to 6m	Power boat more than 6m	Sail boat (any size)	Jet ski	Dinghy	Kayak	Canoe	Stand-up paddleboard (SUP)
	Base, n=	900	197	68	59	71	81	293	55	55
	Ensure that there are enough lifejackets for everyone on board	70%	81%	61%	67%	72%	76%	71%	72%	37%
	Ensure all child passengers wear a lifejacket the entire time they are on the water*	67%	73%	58%	53%	60%	79%	72%	77%	54%
	Avoid alcohol before or during the outing	62%	62%	49%	45%	68%	61%	68%	65%	65%
	Wear a lifejacket the entire time you are on the water	61%	57%	39%	47%	67%	68%	71%	75%	40%
	Check the marine or mountain forecast before you go out on the water	56%	74%	67%	61%	51%	56%	47%	48%	42%
	Ensure all adult passengers wear a lifejacket the entire time they are on the water*	52%	55%	35%	49%	54%	53%	62%	65%	24%
	Ensure there are at least two ways to call or signal for help (including a cellphone in a bag, marine VHF radio, a distress beacon, flares, air horn or waterproof torch)	40%	58%	65%	53%	47%	39%	25%	35%	21%

Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / users (n=900). *Note: Reduced base size of n=455 for owners / regular skippers only.
 Note: Base too low to look at Windsurfers.

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Significantly higher vs. Total is shown in green
 Significantly lower vs. Total is shown in red
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This year, 90% of recreational vessels owners / users have indicated that boating safety is important to them personally (vs. 92% in 2018). As with the results from 2018 and 2017, the attitudes and behaviours to boating safety do not always correspond with what is being said. Kayakers and canoeists, for example, are significantly more likely in 2019 to wear lifejackets the entire time they are on the water compared to those who own / use power boats over 6 metres or sail boats of any size.

Owners / users of power boats up to 6 metres, on the other hand, are significantly more likely than any other type of vessel owner to ensure there are enough lifejackets for all their passengers. Additionally, owners / users of both types of power boats (under and over 6m) are significantly more likely to ensure that there are at least two ways to call or signal for help.

2019 Recreational Boating Participation Research

These differences reflect the understandable differences in perceived risk across vessel types, waterway types (e.g. calm lake vs choppy sea), and the differing levels of ease of some safety behaviours in different vessels (e.g. carrying a VHF radio on a kayak vs a large powerboat).

HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD – BY AGE

Vessel own / use	Total recreational boaters	Age Group					
		18–24 years	25–34 years	35–44 years	45–54 years	55–64 years	65+ years
Base, n=	900	152	200	176	140	127	105
Ensure that there are enough lifejackets for everyone on board	70%	63%	65%	70%	77%	79%	73%
Ensure all child passengers wear a lifejacket the entire time they are on the water*	67%	54%	64%	70%	67%	82%	74%
Avoid alcohol before or during the outing	62%	56%	55%	66%	66%	66%	71%
Wear a lifejacket the entire time you are on the water	61%	51%	62%	64%	62%	67%	63%
Check the marine or mountain forecast before you go out on the water	56%	49%	49%	56%	61%	68%	59%
Ensure all adult passengers wear a lifejacket the entire time they are on the water*	52%	44%	45%	56%	54%	62%	59%
Ensure there are at least two ways to call or signal for help (including a cell phone in a bag, marine VHF radio, a distress beacon, flares, air horn or waterproof torch)	40%	33%	37%	36%	42%	57%	45%

Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?

Base: NZers 18+ recreational boating owners / users (n=900). *Note: Reduced base size of n=455 for owners / regular skippers only

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HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD – BY EXPERIENCE & TRIP TIME

Vessel own / use	Total recreational boaters	Years of use (main vessel)			Typical trip time			
		Up to 5 years' experience	6–20 years experience	More than 20 years' experience	Less than 1 hour	1 to 4 hours	4 hours to 1 day	Overnight / 2 days or more
Base, n=	900	507	298	95	378	654	334	74
Ensure that there are enough lifejackets for everyone on board	70%	64%	79%	76%	70%	70%	72%	63%
Ensure all child passengers wear a lifejacket the entire time they are on the water*	67%	61%	73%	76%	70%	65%	67%	48%
Avoid alcohol before or during the outing	62%	61%	62%	70%	61%	65%	59%	47%
Wear a lifejacket the entire time you are on the water	61%	60%	61%	63%	62%	63%	54%	47%
Check the marine or mountain forecast before you go out on the water	56%	52%	61%	64%	50%	56%	65%	65%
Ensure all adult passengers wear a lifejacket the entire time they are on the water*	52%	52%	55%	43%	51%	52%	46%	38%
Ensure there are at least two ways to call or signal for help (including a cell phone in a bag, marine VHF radio, a distress beacon, flares, air horn or waterproof torch)	40%	37%	45%	46%	40%	39%	49%	50%

Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?

Base: NZers 18+ recreational boating owners / users (n=900). *Note: Reduced base size of n=455 for owners / regular skippers only

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GAME CHANGERS



While there is no difference in adoption of desirable behaviours based on whether or not boaties have taken a course in the past, there are some significant differences by age, years of experience, and length of journey:

- 1) While older boaties (aged 55–64 years) are much more likely to ensure a child on board wears a lifejacket 'every time' (82%) than younger boaties aged 18–24 years (54%) and 25–34 years (64%), they are only marginally more likely to wear a lifejacket themselves (67%) compared to younger boaties aged 18–24 years (51%) and 25–34 years (62%).

2019 Recreational Boating Participation Research

- 2) Those with more experience show moderate improvements across most desirable behaviours, most notably for providing lifejackets and ensuring children wear lifejackets while on the water.
- 3) The typical trip length also has an impact on the adoption of behaviours, as for many taking longer and overnight journeys the time on the water may include time at anchor. This is likely associated with the size of the vessel as well, as larger vessels are more likely to include overnight bunks. Those taking longer trips, however, are more likely to check the weather forecast before departing and to ensure that they have two ways to call or signal for help.



Increasing Behavioural Change

Underlying Theory

The questionnaire used for the 2019 Recreational Boating Survey contained the same questions used in both the 2018 and 2017 surveys, which are based upon the MAPS model of behavioural change. This contends there are four MAPS areas where behaviour can be influenced. These are:

M. Motivational Factors

A. Ability Factors

P. Physical Factors

S. Social Factors

This model was used to better understand the barriers that exist in relation to the four key behaviours⁵ where Maritime NZ desires an increased amount of behavioural change in terms of:

- **Lifejacket usage**
- **Weather checking**
- **Taking sufficient forms of signalling**
- **Avoiding alcohol while boating**

These four MAPS factors and examples of how they can relate to safe boating behaviour are explained in more detail below.

A. MOTIVATIONAL FACTORS

There are many roads to increase or decrease motivation. Tapping into hidden motivations or conscious goals, intentions, and commitment is one road; relying on a positive incentive or a reinforcement mechanism (e.g. rewarding people seen to be using lifejackets) or negative consequences (e.g. the *Don't Be A Clown* and *Joe Bro* campaigns that made it socially unacceptable to boat without a lifejacket) to initiate and shape a new habit is a different one. Using cognitive mechanisms like our aversion to losses can also greatly impact motivation.

Because motivation can be short-lived, inconsistent, and fickle, the more roads to motivation that can be mustered, the better. This includes new developments in areas such as augmented and virtual reality, which can give people experiences that are so emotionally life-like that they feel more motivated than if just information alone were transmitted. The virtual-reality experience recently used in New Zealand to give people the experience of being trapped in a burning house could for instance be extended to demonstrate how quickly one can be swept overboard.

B. ABILITY FACTORS

Some behaviours are hindered by our physical abilities, such as the inability to use a marine VHF radio or wearing a poorly fitted lifejacket. Others are simply hindered by lack of awareness (i.e. not being aware of safer boating resources such as marine weather apps) or lack of skill (i.e. being able to decipher marine-specific terms such as 'swell'). Cognitive mechanisms can also hinder our ability to change behaviour (e.g. a natural preference to do things as they have habitually been done).

⁵ Note that when setting priorities, each set of questions (lifejacket usage, weather-checking, etc.) will have been answered by approximately similar numbers of respondents, assigned in a manner to ensure that respondents had to answer only one answer-set each. Therefore, if priorities are to be set for one of these behavioural change areas, we recommend looking at the incidence levels recorded in Q30 (regular use of lifejackets, emergency communications, etc.) to identify where the greatest changes are desired.

In many situations, people need to take new information or cues on board to change their impression and their behaviour, and confirmation bias becomes a cognitive obstacle to our ability to perform the behaviour. For example, new information about a changed weather forecast can be rejected if other boaties are seen to be heading offshore, thereby confirming one's view that a potentially questionable behaviour is acceptable.

The environment we create also plays a part in ensuring we have the ability to perform a behaviour. Many devices provide a way to self-regulate our behaviour (e.g. the Coastguard and MarineMate apps with safety information). Technology like these apps can increase our physical and cognitive ability to perform specific behaviours, thus making it easier and more convenient to make safer decisions. For example, the MetService weather app indicates how users should potentially dress and what sun protection to use.

C. PHYSICAL FACTORS

The physical environment not only provides cues as to why desirable behaviour is not happening (e.g. lifejackets not easily accessible or alcohol brought on board), it also offers opportunities to encourage better behaviour. This could be done by unobtrusively encouraging people to imitate other people (e.g. signs showing boating role models like the Big Angry Fish duo wearing lifejackets at boat ramps), by adding visuals to text information, or by priming people with sensory cues so that thoughts or options become more available to their mind and are more likely to influence their impressions, preferences, and behaviour at the right moment (e.g. lifejacket messages on buoys).

The environment can also influence behaviour by changing the architecture of the choice environment (e.g. people must make conscious choices) or creating cues that make desirable default choices more visible and / or more attractive (e.g. giving boaties with lifejackets preferred access to boat ramps).

Time can also be used to disrupt existing patterns and behaviours or create meaningful associations leading to new behaviours. Changing smoke alarm batteries with daylight saving is now a common meme, while safer boating behaviours might be linked to key dates such as boat maintenance during Labour Weekend.

D. SOCIAL FACTORS

Individual behaviour is very strongly shaped by other people, through a range of social norms. We can be influenced by what we see other people (e.g. parents, friends, or celebrity boaties such as Big Angry Fish) do or what we think they expect us to do. We are also more likely to follow up on commitments if they happen to be made publicly (or at least in the eye of significant others). Our impressions, judgement, and decisions are influenced by an innate sense of fairness or a learned sense of obligation to reciprocate. This is further compounded by social media, which provides new avenues to harness social forces in our quest for behaviour change.

The fact that many boaties go boating with family members or friends creates a challenge for Maritime NZ in changing the social norms of the group. This is because it can be difficult for a group member to challenge the established norms of the group, with the attendant risk of a negative reaction. Therefore work needs to be done to make each of the four safety behaviours more socially desirable, plus the provision of social scripts that can be employed by those wishing to promote safer behaviours without fear of social rejection. The NZTA 'local legends' advertisements are good examples, providing terms such as 'ghost chips' and 'my balls are in your hands' to serve as humorous verbal shortcuts to use in order to raise a concern with less fear of social rejection.

Identifying MAPS Factors to Address

As discussed earlier, Maritime NZ has identified four key safer boating behaviours which are of the greatest priority:

- Lifejacket usage
- Weather-checking
- Taking sufficient forms of signalling
- Avoiding alcohol while boating

Respondents were again asked in 2019 about their normal habits in relation to these behaviours and were allocated a set of questions pertaining to their ‘unsafe’ behaviours (unless they reported safe behaviours in all four areas). These are discussed in more detail below.

Emergency communications

‘Non-Signallers’ is the term we have used for those who do not always ensure that they have at least two forms of communication on board when going boating. Key outtakes are:

- Boaties are now more likely than in 2018 to report being able to use distress / emergency beacons and distress flares (ability).
- Boaties are now more likely than in 2018 to agree it is important to have at least two emergency communication devices on board at all times (motivation).
- Boaties are now less likely than in 2018 to agree there is a suitable VHF radio on the vessel they usually go boating on (physical).
- Desirable signalling behaviour in the social and physical factor categories continues to be low.

Overall, there remains a strong need to increase the carrying of multiple forms of communication on board, coupled with a matching ability for all on board to use them. Motivation is good, but follow-through is required.

BOATING BEHAVIOUR – EMERGENCY COMMUNICATIONS Non-signallers’ behaviour when boating

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned that I may need to call for help while on my normal boating trips	32%	33%	15%
I would be embarrassed to encourage others to take emergency communications devices	12%	70%	17%
My opinion about emergency communications devices doesn't make a difference	18%	45%	37%
I believe that it is important to have at least two emergency communications devices on board at all times	38%	28%	34%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to use distress / emergency beacons	34%	54%	12%
I know how to use VHF maritime radio services when on the water*	22%	67%	11%
There is always somebody with a marine VHF operators qualification on my boat trips**	14%	71%	15%
I know the call sign for the vessel I usually go boating on*	14%	59%	27%
I know how to use distress flares	35%	51%	11%
Social Factors	AGREE	DISAGREE	NEITHER / DK
The people I normally go boating with all agree that at least two forms of communication are carried	15%	44%	37%
I usually let others manage the communications devices	38%	31%	31%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
There are distress / emergency beacons on the vessel I usually go boating on (including EPIRBs and PLBs)	9%	60%	31%
There are distress flares on the vessel I usually go boating on	13%	66%	22%
There is a suitable VHF radio on the vessel I usually go boating on*	14%	60%	26%

Q33: Below you will see some statements about communications methods when boating. Please indicate how much you agree or disagree with each statement, as it relates to the boat trips that you normally take on <VESSEL SELECTED IN Q14>.

Base: NZers 18+ recreational boating owners / users – Non-signallers (n=115). *Caution: Low base (n=25) – excludes Kayak, Canoe, SUP and Windsurfers.

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Note: Figures in blue represent the desirable response for that behaviour.

Agree = Slightly agree / Somewhat agree / Strongly agree
Disagree = Somewhat disagree / Strongly disagree

GAME CHANGERS



Note: Figures in blue represent the desirable response for that behaviour. Base too low to look at results by vessel type.

Weather forecast

‘Non-Weather-Checkers’ is the term we have used for those who do not always check the marine or mountain forecasts before going boating. Note that the questionnaire developed in collaboration with Maritime NZ included marine VHF radio capability factors, as these can influence the ability to check weather forecasts on the water. Key outtakes are:

- Boaties remain unlikely to have VHF and maritime radios and handbooks on board (physical).
- There has been a substantial decline in actual or perceived incidence of people with a marine VHF operators’ qualification accompanying their boat trips (capability).

Overall, while boaties are feeling increasingly more concerned about the potential for weather conditions to deteriorate when out on the water, their knowledge and subsequent ability around getting the maritime and mountain weather forecasts has improved compared to the previous year.

BOATING BEHAVIOUR – CHECK MARINE / MOUNTAIN FORECAST BEFORE GOING OUT ON THE WATER Non-weather-checkers’ behaviour when boating

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned with the potential for the weather to become worse while on my normal boating trips	63%	23%	14%
I would be embarrassed to encourage others to check the weather	12%	75%	13%
I would be embarrassed to encourage others to change the trip plans because of the weather	19%	70%	12%
My opinion about the weather doesn't make a difference	25%	53%	22%
I am not confident about getting everyone on board to pay attention to the weather	30%	38%	31%
I believe that weather forecasts are important to consider at all times	76%	12%	12%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to get the maritime / mountain weather forecasts	53%	35%	12%
I know how to use VHF maritime radio services when on the water*	22%	64%	14%
There is always somebody with a marine VHF operators qualification on my boat trips*	▼ 0% (34%)	57%	43%
I know the call sign for the vessel I usually go boating on*	22%	68%	9%
Understand all the parts of the weather forecast	45%	47%	8%
Social Factors	AGREE	DISAGREE	NEITHER / DK
The people I normally go boating with all agree that the weather forecast must be considered at all times	59%	20%	22%
I will let others decide what to do regardless of the weather forecast	31%	45%	24%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
There is a copy of the Maritime NZ Radio Handbook on the vessel I usually go boating on*	4%	▲ 68% (31%)	28%
There is a suitable VHF radio on the vessel I usually go boating on*	▼ 11% (53%)	56%	32%

Agree = Slightly agree / Somewhat agree / Strongly agree
Disagree = Slightly disagree / Somewhat disagree / Strongly disagree

Q12: Below you will see some statements about checking the weather when boating. Please indicate how much you agree or disagree with each statement, as it relates to the boat trips that you normally take on <VESSEL SELECTED IN Q14>.

Base: NZers 18+ recreational boating owners / users – Non-weather-checkers (n=58). *CAUTION: Low base (n=18) – excludes Kayak, Canoe, SUP and Windsurfers.

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GAME CHANGERS



Note: Figures in blue represent the desirable response for that behaviour. ▲ ▼ Low Base with significantly higher / lower compared to 2018 ()

Note: Figures in blue represent the desirable response for that behaviour. Base too low to look at results by vessel type. While the results cited as significant above are statistically significant, the fact that they are based on just n=18 large boat using non-weather checkers means that the dramatic changes in reported behaviour should be treated with caution.

Alcohol use

‘Drinkers’ is the term we have used for those who drink and / or allow the drinking of alcohol when boating. Compared to last year:

- Positive social factors have all decreased in incidence – while boaties are motivated to manage alcohol consumption and increasingly feel able to manage it, they remain pressured to drink when others are and feel that they are unable to comfortably encourage others’ alcohol reduction, that it is not their place to restrict others’ drinking, and that their efforts would not make a difference.
- **There is a strong conflict between boaties’ being motivated to reduce drinking and having the ability to do it, and the social barriers stopping alcohol minimisation techniques being put into action.** The issue is the reticence to be the ‘party-pooper’ who has the audacity to ‘tell others how to drink’.

BOATING BEHAVIOUR – AVOIDING ALCOHOL WHILE BOATING

Drinkers' behaviour when boating

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned with the potential for problems to occur when people drink too much alcohol when boating	59%	15%	▲26% (9%)
I would be embarrassed to encourage others to drink less alcohol while boating	21%	50%	28%
My opinion about alcohol doesn't make a difference	▲39% (14%)	33%	27%
I am not confident about getting everyone on board to reduce their alcohol consumption	33%	33%	33%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to reduce on-board alcohol consumption to avoid problems	▲61% (37%)	▼14% (36%)	24%
Operating a boat when drunk is illegal	70%	17%	13%
Social Factors	AGREE	DISAGREE	NEITHER / DK
The people I normally go boating with all agree that alcohol consumption should be minimised when on the water	45%	37%	19%
It's up to individuals whether they decide to drink alcohol or not	67%	19%	14%
I reduce my alcohol consumption only if others are also drinking less	22%	44%	34%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
It's easy to ensure less alcohol is drunk on board	58%	19%	23%
It's OK to drink alcohol for the type of boating I usually do	64%	14%	21%

Agree = Slightly agree / Somewhat agree / Strongly agree
Disagree = Strongly disagree / Somewhat disagree / Slightly disagree

Q34: Below you will see some statements about drinking alcohol when boating. Please indicate how much you agree or disagree with each statement, as it relates to the boat trips that you normally take on <VESSEL SELECTED IN Q14>.

Base: NZers 18+ recreational boating owners / users – Drinkers (n=56)

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Note: Figures in blue represent the desirable response for that behaviour.

▲ Significantly higher / lower compared to 2018 ()

GAME CHANGERS



Note: Figures in blue represent the desirable response for that behaviour. Base too low to look at results by vessel type.

Lifejacket behaviour

'Non-Lifejacket-Users' is the term we have used for those who do not always ensure that they wear a lifejacket when they go out on the water.

- Both statements associated with physical factors show increases compared to last year, possibly reflecting the gradual increase in smaller, more comfortable lifejackets, especially after the 'old for new' lifejacket swap scheme.
- However, as with alcohol consumption, boaties are inhibited by social and motivational factors – being reticent to comment on others' use of lifejackets, increasingly feeling embarrassed to encourage others to wear them, and seemingly justifying this by increasingly claiming that their opinions wouldn't make a difference.
- **Boaties need to feel that lifejacket usage, and its encouragement, is socially acceptable.**

BOATING BEHAVIOUR – LIFEJACKETS

Non-lifejacket-users' behaviour when boating

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned with the potential for drownings to occur	53%	23%	24%
I would be embarrassed to encourage others to wear lifejackets	▲27% (14%)	59%	14%
My opinion about lifejackets doesn't make a difference	▲31% (10%)	▼41% (58%)	27%
I am not confident about getting everyone on board to wear lifejackets	27%	50%	22%
I believe that lifejackets are important to wear at all times	45%	31%	25%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to use lifejackets properly	77%	13%	10%
There are not always enough lifejackets for everybody on board	15%	58%	27%
Social Factors	AGREE	DISAGREE	NEITHER / DK
The people I normally go boating with all agree that lifejackets are important to wear at all times	37%	42%	22%
It's up to individuals whether they decide to wear lifejackets or not	48%	34%	18%
I only wear a lifejacket if others are also wearing them	21%	53%	26%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
Using lifejackets is convenient and comfortable	43%	43%	▼14% (31%)
It is OK to put on a lifejacket only when the conditions get rough	53%	36%	11%

Agree = Slightly agree / Somewhat agree / Strongly agree
Disagree = Strongly disagree / Somewhat disagree / Slightly disagree

Q31: Below you will see some statements about lifejackets. Please indicate how much you agree or disagree with each statement, as it relates to the boat trips that you normally take on <VESSEL SELECTED IN Q14>.

Base: NZers 18+ recreational boating owners / users – Non-lifejacket-users (n=70)

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Note: Figures in blue represent the desirable response for that behaviour.

▲ Significantly higher / lower compared to 2018 ()

GAME CHANGERS



Note: Figures in blue represent the desirable response for that behaviour. Base too low to look at results by vessel type.

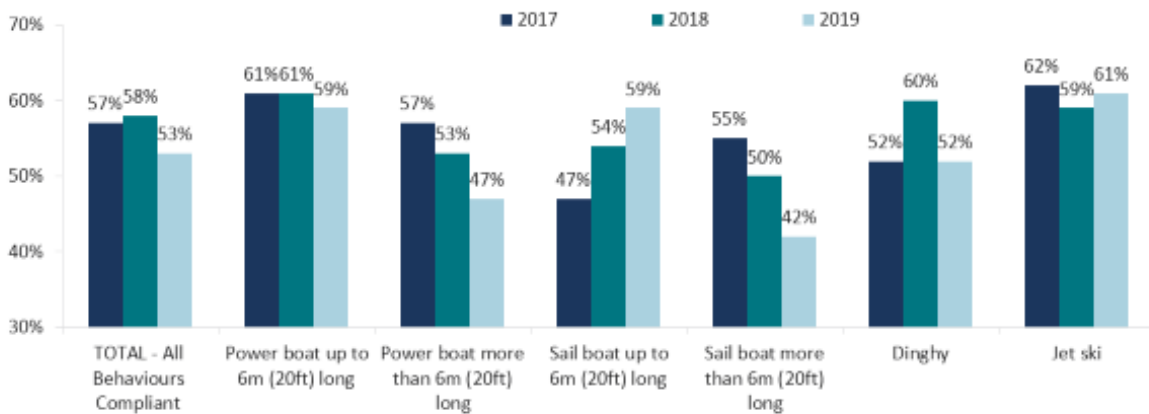
The 'Super Safe Boatie'

As discussed earlier, the Safer Boating Forum also emphasises skipper responsibility in addition to the four risk factors that have been investigated above. Maritime NZ is interested in those skippers and boaties who we describe here as the 'super safe boatie'. These boaties are positioned as the most responsible types of skippers and boat users, as they are individuals who avoid alcohol, check the forecast, carry two forms of communication devices (one of which is waterproof), and also make sure everyone on board wears lifejackets. Significantly, these boaties do **all four** of these key things rather than just one.

In 2019, jet ski users exhibited the greatest level of key behaviour compliance at 61%. This demonstrates that out of all skippers of the main recreational vessels discussed in this report, jet ski users were the most likely to avoid alcohol, check the marine and mountain forecast, carry two forms of communication devices, and also ensure that all passengers on board their craft wear lifejackets. Jet ski users were also the most compliant of all skippers in 2017 (62%) and only second to dinghy users the following year (59% vs. 60% in 2018). At the overall level, total behaviour compliance has dropped from 57% in 2017 to 53% in the current year. This is ultimately consistent with some clear decreases in 2019 in relation to some risk-related behaviour on the water.

SUPER SAFE BOATIES

With 61%, jet ski skippers are the most compliant with all four behaviours in 2019. Sail boat (6m+) skippers exhibited the lowest compliance at 42%



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?
 Base: NZers 18+ recreational boating owners / regular skippers (2019 n=293, 2018 n=404, 2017 n=299)
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GAME CHANGERS



Combination Small-Powered Vessel Users

For the purposes of the 2019 analysis, this category of recreational boatie (“combination small-powered vessel users”) is comprised of the 240 respondents who reported that the main vessel they own, use or spend time on is either a dinghy that at least ‘sometimes’ uses a motor (n=43), and/or a small powerboat of up to 6 metres (n=197) (equating to approximately 27% of the boatie population). Please note that an analysis of small-powered vessel users has not been conducted in previous years and is a new reporting feature in 2019.

Region and Waterways

There were no significant regional differences between boaties who own, use or spend time on small-powered vessels and the wider New Zealand recreational boatie population.

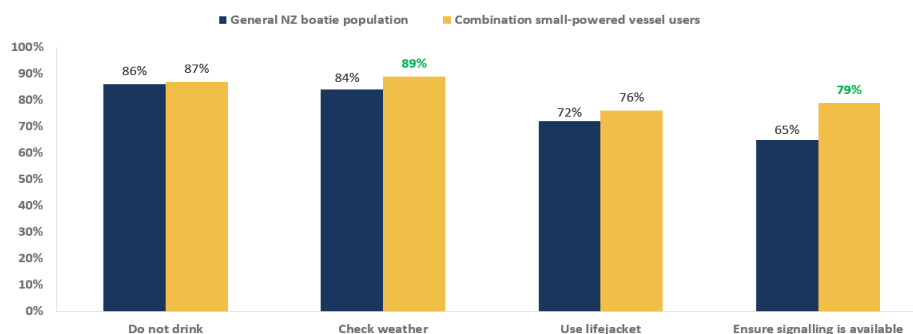
Interestingly (because of the extra vessel control needed on rivers), small-powered vessel users were significantly less likely to go on trips on a river (2% vs. 7% general NZ boatie population).

Safety Behaviours

In terms of the four key risk factors, results clearly indicate that small-powered vessel users are overall more likely to exhibit safer behaviour than the wider New Zealand recreational boatie population, particularly in relation to checking the weather and ensuring that signalling is available.

HOW REGULARLY DO EACH OF THE FOLLOWING THINGS ON BOARD

Small-powered vessel users are significantly more likely to check the weather & ensure 2+ ways to call / signal for help are available



Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?

Base: NZers 18+ recreational boating owners / users (2019 n=900), combination small-powered vessel users (n=240). Note: % don't add up to 100% as 'Don't know / Not applicable' not included in chart.

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Significantly higher vs. previous wave is shown in green **GAME CHANGERS**



The percentage of small-powered vessel users who report wearing a life jacket ‘every time’ compared to the general boatie population was very similar (59% vs. 61% general NZ boatie population), as was those who avoid alcohol either before or during excursions ‘every time’ (63% vs. 62% general NZ boatie population). Importantly, significant differences were evident with regards to weather checking and use of emergency communications:

- Small-powered vessel users were significantly more likely than the general boatie population to say they check the marine or mountains forecast ‘every time’ before heading out on the water (72% vs. 56% general NZ boatie population).

- Small-powered vessel users were also significantly more likely to ensure there are at least two ways to call or signal for help if required ‘every time’ (53% vs. 40% general NZ boatie population).

MAPS Factors

A MAPS analysis⁶ was also conducted for users of small-powered vessels. It must be stressed that compared to the wider New Zealand boatie population, the base sizes for each of the four key safer boating behaviours are extremely small (i.e. between n=8 to n=32) and so the results are indicative only.

Emergency communications

Compared to the wider New Zealand boatie population, small-powered vessel users appear to be:

- Less concerned that they may need to call for help while on their normal boating trips (7% concerned c/f 32% general NZ boatie population) (a motivation-related problem);
- Less likely to go boating with people who agree that at least two forms of communication are carried (62% disagree that others agree about this issue c/f 44%) (a social pressure-related problem);
- More likely to agree that there are distress / emergency beacons on the vessel they usually go boating on (0% c/f 9%) (a problem of physical capability).

BOATING BEHAVIOUR – EMERGENCY COMMUNICATIONS:

SMALL POWERED VESSEL USERS

Non-signallers’ behaviour when boating

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned that I may need to call for help while on my normal boating trips	7%	72%	21%
I would be embarrassed to encourage others to take emergency communications devices	7%	64%	29%
My opinion about emergency communications devices doesn't make a difference	14%	38%	48%
I believe that it is important to have at least two emergency communications devices on board at all times	21%	30%	49%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to use distress / emergency beacons	37%	56%	7%
I know how to use VHF maritime radio services when on the water*	8%	85%	7%
There is always somebody with a marine VHF operators qualification on my boat trips*	0%	93%	7%
I know the call sign for the vessel I usually go boating on*	7%	70%	23%
I know how to use distress flares	37%	56%	7%
Social Factors	AGREE	DISAGREE	NEITHER / DK
The people I normally go boating with all agree that at least two forms of communication are carried	22%	62%	15%
I usually let others manage the communications devices	36%	30%	34%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
There are distress / emergency beacons on the vessel I usually go boating on (including EPIRBs and PLBs)	0%	86%	14%
There are distress flares on the vessel I usually go boating on	17%	61%	22%
There is a suitable VHF radio on the vessel I usually go boating on*	7%	71%	22%

Q33: Below you will see some statements about communications methods when boating. Please indicate how much you agree or disagree with each statement, as it relates to the boat trips that you normally take on <VESSEL SELECTED IN Q14>.

Base: NZers 18+ recreational boating owners / users – Non-signallers (n=12) – *Caution: extremely low base.

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Note: Figures in blue represent the desirable response for that behaviour.

Agree = Slightly agree / Somewhat agree / Strongly agree
Disagree = Strongly disagree / Somewhat disagree / Slightly disagree

GAME CHANGERS



Weather forecast

Compared to the wider New Zealand boatie population, small-powered vessel users appear to be:

- More likely to disagree that they would be embarrassed to encourage others to check the weather (90% c/f 75%) (a motivation-related problem);
- More likely to disagree that they would be embarrassed to encourage others to change their trip plans because of the weather (78% c/f 70%) (a motivation-related problem);

⁶ Please refer to pages 37-38 of this report for a full explanation of the MAPS model of behaviour change.

2019 Recreational Boating Participation Research

- More likely to agree that there is a copy of the Maritime NZ Radio Handbook on the craft they usually go boating on (10% c/f 4%) (a problem of physical capability).

BOATING BEHAVIOUR – CHECK MARINE / MOUNTAIN FORECAST BEFORE GOING OUT ON THE WATER: SMALL POWERED VESSEL USERS

Non-weather-checkers' behaviour when boating

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned with the potential for the weather to become worse while on my normal boating trips	58%	24%	19%
I would be embarrassed to encourage others to check the weather	10%	90%	0%
I would be embarrassed to encourage others to change the trip plans because of the weather	22%	78%	0%
My opinion about the weather doesn't make a difference	31%	60%	9%
I am not confident about getting everyone on board to pay attention to the weather	21%	47%	32%
I believe that weather forecasts are important to consider at all times	69%	22%	9%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to get the maritime / mountain weather forecasts	53%	37%	10%
I know how to use VHF maritime radio services when on the water*	12%	78%	10%
There is always somebody with a marine VHF operators qualification on my boat trips*	0%	62%	38%
I know the call sign for the vessel I usually go boating on*	12%	77%	11%
Understand all the parts of the weather forecast	44%	47%	9%
Social Factors	AGREE	DISAGREE	NEITHER / DK
The people I normally go boating with all agree that the weather forecast must be considered at all times	58%	22%	20%
I will let others decide what to do regardless of the weather forecast	57%	24%	19%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
There is a copy of the Maritime NZ Radio Handbook on the vessel I usually go boating on*	10%	64%	26%
There is a suitable VHF radio on the vessel I usually go boating on*	15%	50%	36%

Q32: Below you will see some statements about checking the weather when boating. Please indicate how much you agree or disagree with each statement, as it relates to the boat trips that you normally take on <VESSEL SELECTED IN Q14>.

Base: NZers 18+ recreational boating owners / users – Non-weather-checkers (n=9) - *Caution: extremely low base. *Caution: extremely low base (n=8).

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Note: Figures in blue represent the desirable response for that behaviour.

GAME CHANGERS



Agree = Slightly agree / Somewhat agree / Strongly agree
Disagree = Strongly disagree / Somewhat disagree / Slightly disagree

Alcohol use

Compared to the wider New Zealand boatie population, small-powered vessel users appear to be:

- More likely to agree that they are concerned with the potential for problems to occur when people drink too much alcohol when boating (76% c/f 59%) (a motivation-related problem);
- More likely to agree that they know how to reduce onboard alcohol consumption to avoid problems (81% c/f 61%) (an ability-related problem);
- More likely to agree that it is easy to ensure that less alcohol is drunk onboard (76% c/f 58%) (a physical-related problem).

BOATING BEHAVIOUR – AVOIDING ALCOHOL WHILE BOATING:
SMALL POWERED VESSEL USERS

Drinkers' behaviour when boating

	AGREE	DISAGREE	NEITHER / DK
Motivational Factors			
I am concerned with the potential for problems to occur when people drink too much alcohol when boating	76%	16%	8%
I would be embarrassed to encourage others to drink less alcohol while boating	23%	57%	20%
My opinion about alcohol doesn't make a difference	32%	47%	20%
I am not confident about getting everyone on board to reduce their alcohol consumption	37%	43%	20%
Ability Factors			
I know how to reduce on-board alcohol consumption to avoid problems	81%	10%	9%
Operating a boat when drunk is illegal	76%	5%	20%
Social Factors			
The people I normally go boating with all agree that alcohol consumption should be minimised when on the water	56%	30%	14%
It's up to individuals whether they decide to drink alcohol or not	86%	14%	0%
I reduce my alcohol consumption only if others are also drinking less	39%	38%	23%
Physical Factors			
It's easy to ensure less alcohol is drunk on board	76%	8%	16%
It's OK to drink alcohol for the type of boating I usually do	82%	10%	9%

Agree = Slightly agree / Somewhat agree / Strongly agree
Disagree = Strongly disagree / Somewhat disagree / Slightly disagree

Q34: Below you will see some statements about drinking alcohol when boating. Please indicate how much you agree or disagree with each statement, as it relates to the boat trips that you normally take on <VESSEL SELECTED IN Q14>.

Base: NZers 18+ recreational boating owners / users – Drinkers (n=21) - *Caution: extremely low base.

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Note: Figures in blue represent the desirable response for that behaviour.

GAME CHANGERS



Lifejacket behaviour

Compared to the wider New Zealand boatie population, small-powered vessel users appear to be:

- More likely to feel confident about getting everyone onboard to wear lifejackets (66% disagreeing they would lack confidence c/f 50% general NZ boatie population) (a motivation-related problem);
- More likely to disagree that there are not always enough lifejackets for everyone onboard (77% c/f 58%) (an ability-related problem);
- Less likely to agree that it's up to individuals whether they decide to wear lifejackets or not (38% c/f 48% general NZ boatie population) (a social pressure-related problem).

BOATING BEHAVIOUR – LIFEJACKETS: SMALL POWERED VESSEL USERS

Non-lifejacket-users' behaviour when boating

	AGREE	DISAGREE	NEITHER / DK
Motivational Factors			
I am concerned with the potential for drownings to occur	45%	21%	34%
I would be embarrassed to encourage others to wear lifejackets	14%	67%	18%
My opinion about lifejackets doesn't make a difference	32%	51%	17%
I am not confident about getting everyone on board to wear lifejackets	11%	66%	22%
I believe that lifejackets are important to wear at all times	40%	40%	20%
Ability Factors			
I know how to use lifejackets properly	84%	9%	6%
There are not always enough lifejackets for everybody on board	3%	77%	20%
Social Factors			
The people I normally go boating with all agree that lifejackets are important to wear at all times	30%	58%	12%
It's up to individuals whether they decide to wear lifejackets or not	38%	46%	16%
I only wear a lifejacket if others are also wearing them	19%	60%	22%
Physical Factors			
Using lifejackets is convenient and comfortable	36%	52%	12%
It is OK to put on a lifejacket only when the conditions get rough	48%	42%	9%

Agree = Slightly agree / Somewhat agree / Strongly agree
Disagree = Strongly disagree / Somewhat disagree / Slightly disagree

Q31: Below you will see some statements about lifejackets. Please indicate how much you agree or disagree with each statement, as it relates to the boat trips that you normally take on <VESSEL SELECTED IN Q14>.

Base: NZers 18+ recreational boating owners / users – Non-lifejacket-users (n=32) - *Caution: low base.

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Note: Figures in blue represent the desirable response for that behaviour.

GAME CHANGERS



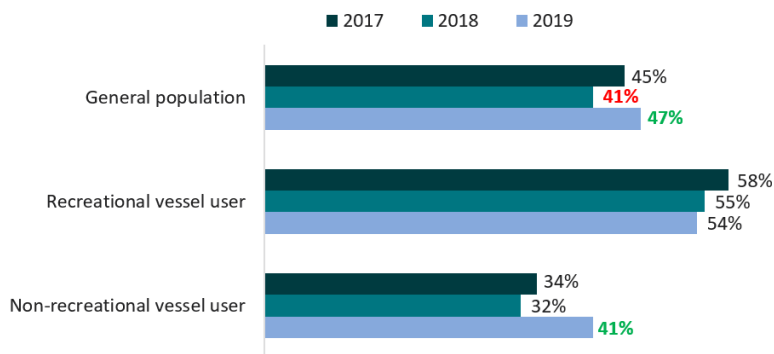
Safety Messages Awareness

Safety messages awareness of recreational boating campaigns has seen a significant increase amongst the general population (47% in 2019 vs. 41% in 2018) and non-recreational vessel users (41% in 2019 vs. 32% in 2018).

When prompted with pictures or a description of the activity, 54% of recreational boaties recalled having seen an aspect of the safety messages or the safer boating ‘activities’ in the previous 12 months (vs. 55% in 2018).

SAFETY MESSAGES AWARENESS

While over 50% of boaties have seen recent safety messages, there have also been significant increases in awareness amongst the general population & non-recreational vessel users



Q36: Which of the following can you recall seeing or learning about since last October?

Base: NZers 18+: General population (2019 n=2,174, 2018 n=3,101, 2017 n=2,122), Recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902), Non-recreational boating owners / users (2019 n=1,274, 2018 n=1,874, 2017 n=1,220)

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Significantly higher vs. previous wave is shown in green
Significantly lower vs. previous wave is shown in red

GAME CHANGERS



Awareness of safety messages in 2019 appears to be higher amongst those aged 25–34 years (59%) and 55–64 years (58%), and boaties in the Tasman / Nelson / Marlborough region (63%), Otago (60%), and the Wellington / Wairarapa and Gisborne / Hawke’s Bay regions (both 59%) compared to the overall recreational boatie sample (54%). **These differences, however, are not statistically significant.** Safety messages are slightly less likely to be recalled by those aged 45–54 years (48%) and 35–44 years (49%).

ADVERTISING RECALL

Awareness of the *VHF Radio Saves Lives* campaign has significantly built over time. Fewer recall the *Safer Boating* logo



Advertisement/ Campaign	'VHF Radio Saves Lives' (TV)	'VHF Radio Saves Lives' (Print)	No Excuses*	'MarineMate' smartphone app	'MetService Marine' app	'Safer Boating Week' logo	'Nobody's Faster than Disaster'	'Old 4 New' lifejacket swaps
2019	22%	NA	21%	6%	26%	13%	8%	17%
2018	NA	10%	8%	NA	29%	18%	7%	19%
2017	NA	NA	1%	NA	26%	17%	13%	13%

Q36: Which of the following can you recall seeing or learning about since last October?

Base: NZers 18+ recreational boating owners / users (2019 n=900, 2018 n=1,227, 2017 n=902)

*Note: 'No excuses' campaign (2018 n=721, 2017 n=280) was asked in 2019 only of those living in all regions of New Zealand except Taranaki. 'No excuses' campaign (2019 n=, 2018 n=721, 2017 n=380) was asked in 2018 only of those living in Waikato, Marlborough, Canterbury, Nelson, Tasman, Hawke's Bay, Bay of Plenty, and Wellington. **In the previous wave it was asked only of those living in Waikato, Marlborough, Canterbury, Otago, and Southland. 'VHF Radio Saves Lives' was print in 2018 and TV in 2019.

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Significantly higher vs. previous wave is shown in green
Significantly lower vs. previous wave is shown in red

GAME CHANGERS



In 2017 respondents were asked if they remembered the *Safer Boating* campaign and a much larger number of safer boating advertisements or activities than in 2018 and 2019. The questions for 2018 and 2019 focused solely on national campaigns in keeping with the overall aims of the research.

This year, boaties were again asked if they could recall the *VHF Radio Saves Lives* campaign and four of the same advertisements or activities as last year. Recall of the Marine Mate smartphone app was asked for the first time in 2019. Additionally, those living in all regions except for Taranaki were asked this year if they could recall the *No Excuses* campaign (in 2018, only those in Waikato, Marlborough, Canterbury, Nelson, Tasman, Hawke's Bay, Bay of Plenty, and Wellington were asked about this campaign).

As respondents were only asked about campaigns run in their areas, the increase in awareness for the *No Excuses* campaign does reflect greater awareness overall.

There is lower awareness of the *Safer Boating Week* logo this year compared to previous waves (13% in 2019 vs. 18% in 2018). The MarineMate smartphone app is recalled by 6% of respondents.

Summary and Key Insights

This report presents the results of the 2019 Recreational Boating Survey which was conducted amongst a nationally representative sample of 2,174 New Zealand adults aged 18+ years by Ipsos New Zealand on behalf of the Safer Boating Forum, led by Maritime NZ.

The latest wave of data collection has found the following key insights regarding recreational boating activities and safety-related attitudes and behaviours:

- Although some improvements have been made by recreational boaties in the four key safer boating behaviours, some results have decreased in relation to risk-related behaviour on the water. The significant decrease in the proportion of non-drinkers is a clear example of this.
- Compared to 2018, there has been a significant decrease in the number of boaties who say they ensure there are enough lifejackets for all their passengers 'every time'.
- However, over three quarters (77%) of owners / users of recreational vessels still report wearing a lifejacket for the whole duration of their boating trip 'every time' or 'most of the time'. This is a result that has been maintained over the past three years.
- There has been a significant increase in 2019 in the number of child passengers who wear a lifejacket the entire time they are out on a vessel compared to adult passengers (67% child vs. 52% adult passengers).
- While there has been a marginal decrease in the number of boaties who reported having at least two ways to either call or signal for help if needed 'every time', the number of those taking E-PIRBs has significantly increased since 2018.
- 36% of boaties still say that they are not aware if their distress or locator beacons have been registered, a number that has continued to increase year-on-year since 2017.
- Approximately 20% of all boaties have kept checking the weather forecast 'most of the time' across the last three years.

Key Recommendations:

- **Multiple forms of communication:** There remains a strong need to increase the carrying of multiple forms of communication on board, coupled with a matching ability for all on board to use them. Motivation is good, but follow-through is required.
- **Safe signalling:** While boaties are feeling increasingly more motivated to ensure that safe signalling is practised when on board, and socially supported in these motivations, their ability to signal themselves, or to ascertain if other passengers and the equipment itself are capable, remains weak.
- **Drinking:** There is a strong conflict between boaties' being motivated to reduce drinking and having the ability to do it, and the social barriers stopping alcohol minimisation techniques being put into action.
- **Lifejacket usage:** Boaties need to feel that lifejacket usage, and its encouragement, is socially acceptable.