
MARITIME NZ
2020 RECREATIONAL BOATING SURVEY – TOP-LINE RESULTS



MARITIME NZ
RECREATIONAL BOATING AND MARKETING MONITOR RESEARCH
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REPORTING NOTE AND METHODOLOGY

Reporting Note

Throughout this top-line report reference is made to groups within the boaties' sample we surveyed whose self-reported behaviour fails to meet Maritime NZ's desired levels of safer boating practice:

- Lifejacket Non-Users (who do not always wear lifejackets)
- Non-Signallers (who do not always carry two forms of communication)
- Weather Non-Checkers (who do not always check the marine or mountain weather forecast before going boating)
- Drinkers (who do not always abstain from drinking alcohol when boating)

As this is key behaviour that Maritime NZ wishes to improve, much of the analysis includes examination of how these four groups think and behave.

Methodology

Maritime New Zealand has been tracking the boating habits of New Zealanders for several years, with Ipsos taking over the annual survey in 2017. Since that year the annual survey has been conducted online, with the questionnaires adapted and improved to match Maritime NZ's priorities of any given year.

For the 2020 survey, data was collected online via the Dynata and iSay consumer research panels from 24th April to 13th May 2020. The 2020 questionnaire added new questions about boat ownership and use, boating information sources, and perceived boating risks. A new section was added to allow non-boaties to answer safety-related questions about their close friends and family members who go boating.

The sample size in 2020 was n=2,006 (boaties n=910 boaties, non-boaties n=1,096). The margin of error associated with a probability sample of n=2,006 is $\pm 2.19\%$ at a 95% confidence interval, which means that 95 times out of 100, we would expect to achieve a result of 50% to fall between 47.81% and 52.19%.

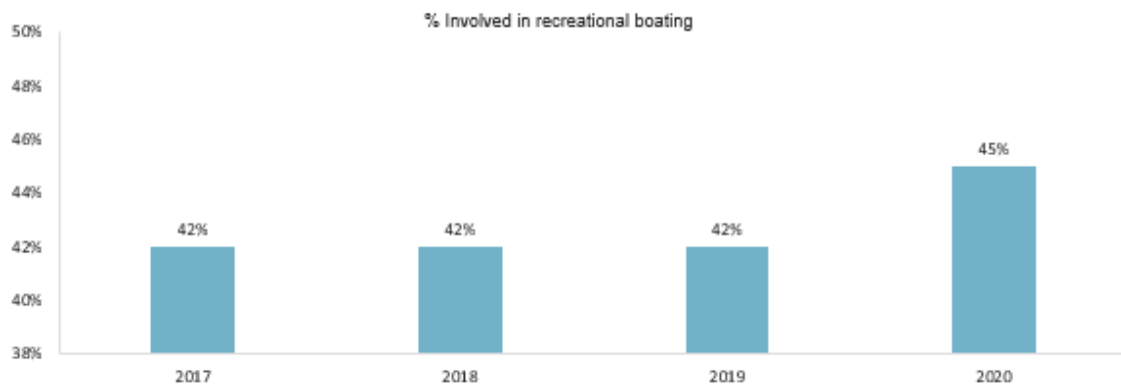
A new boat category - 'Dinghy with an engine' - was also added to the list of vessel options in 2020 to distinguish these vessels from 'power boats less than 6m in length'. This new dinghy option has led to some inevitable differences in results relating to boaties' reported dinghy usage.

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

DEMOGRAPHICS

2020 Participation Rates

This year the proportion of recreational boaters amongst the general population is estimated to be 45%, the highest yet recorded. This extrapolates to approximately 1,672,920 adult New Zealanders involved in recreational boating.

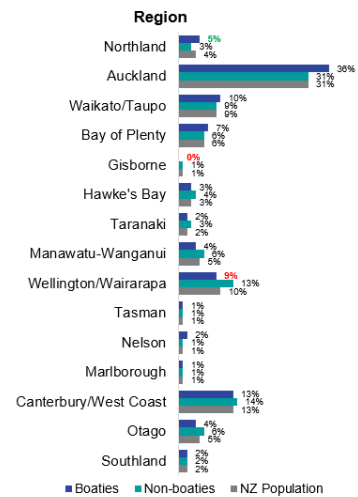
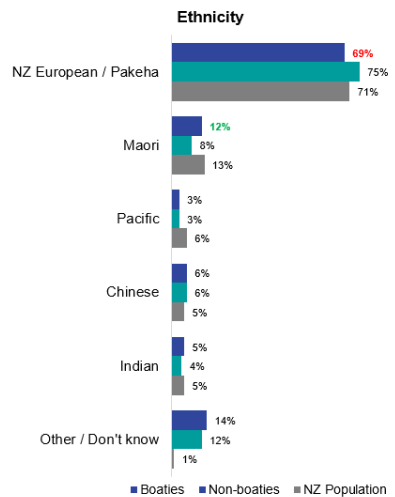
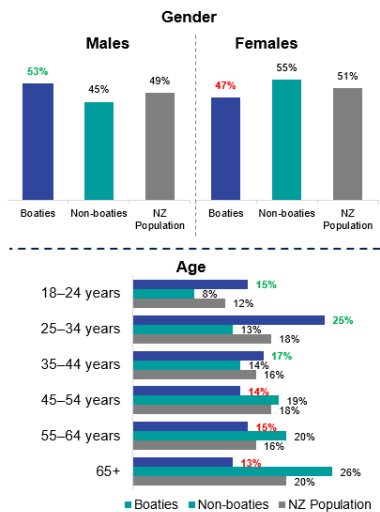


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2020 Participation Rates: Boaties vs. Non-Boaties

The sample included the following key demographics in 2020:

- A significantly higher proportion of males are likely to be boaties than non-boaties (53% boaties vs. 45% of non-boaties).
- 12% of boaties are significantly more likely to identify as being Māori than non-boaties (12% boaties vs. 8% non-boaties).
- A significantly higher proportion of 18-24 and 25-34 year olds are likely to be boaties than non-boaties (18-24 year olds: 15% of boaties vs. 8% of non-boaties; 25-34 year olds: 25% of boaties vs. 13% of non-boaties).



Q1. Which of the following age groups are you in? / Q2. Do you best identify as... / Q3. Which ethnic group or groups do you identify with? / Q4. In which one of the following regions do you normally live?
 Base: NZers 18+ recreational vessel users (n=910), Non-boaties (n=1,096)

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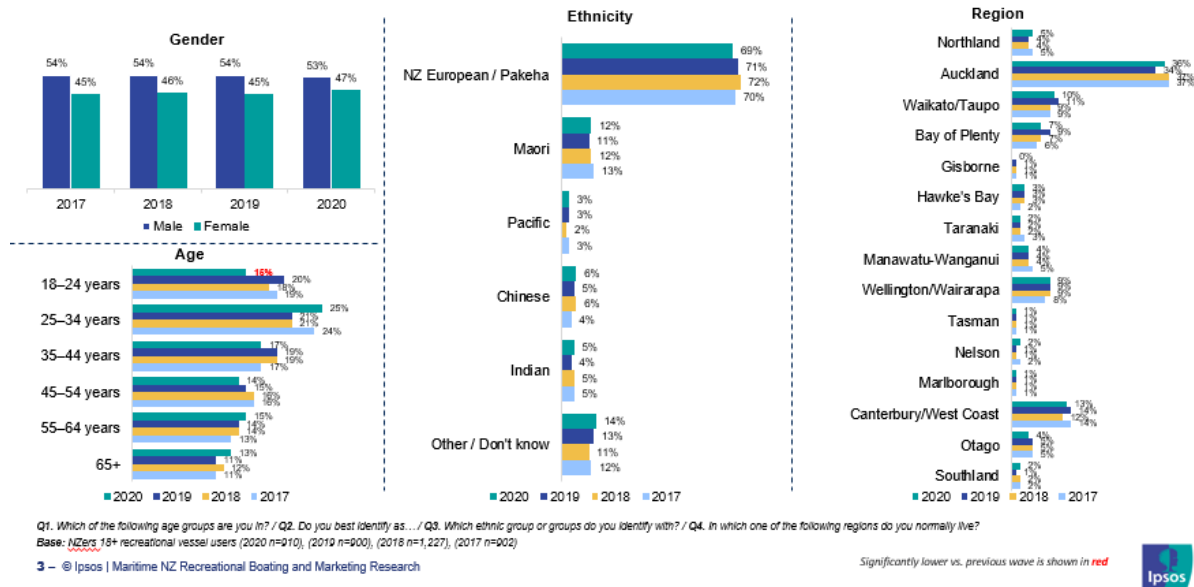
Significantly higher vs. non-boaties is shown in green
 Significantly lower vs. non-boaties is shown in red



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Participation Rates Over time: Boaties

The boaties who have participated in the surveys from 2017 to 2020 have been very similar with regards to gender, age, ethnicity and region where they reside.



2020 Demographics by Vessel Type

The following insights were evident when demographics of boaties were analysed by vessel type:

- Boaties aged 25-34 are significantly more likely to use a power boat of up to 6 metres than boaties in any other age group (41%).
- Female boaties are significantly less likely to use a jet ski than male boaties (24% female vs. 35% male boaties).
- Boaties who identify as Chinese were significantly more likely to use a kayak than any other ethnic group (82%).
- Boaties in the Canterbury/West Coast region are significantly less likely to use a power boat of up to 6 metres than in any other region (33%).

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DEMOGRAPHICS OF BOATIES - 2020

	Gender		Age							Ethnicity							Region										
	Male (n=463)	Female (n=448)	16-24 (n=113)	25-34 (n=227)	35-44 (n=184)	45-54 (n=130)	55-64 (n=138)	65+ (n=128)	Māori (n=107)	Pasifika (n=30)	Chinese (n=51)	Indian (n=42)	Other (n=128)	Northland (n=42)	Waikato (n=50)	Bay of Plenty (n=56)	Goldstone (n=37)	Farwest Bay (n=287)	Taranaki (n=217)	Manawatu (n=101)	Wellington (n=83)	Tairānui (n=71)	Northland (n=131)	Central (n=113)	Waikato (n=42)	Southland (n=177)	
Total	44%	39%	38%	45%	46%	42%	45%	46%	41%	54%	33%	38%	36%	41%	50%	51%	38%	52%	42%	35%	41%	31%	54%	33%	47%	57%	
Power boat up to 6m	29%	26%	26%	41%	28%	22%	20%	27%	26%	39%	32%	45%	31%	29%	27%	38%	38%	8%	10%	23%	28%	15%	40%	24%	24%	28%	
Sail boat up to 6m	16%	13%	17%	19%	13%	14%	16%	17%	13%	12%	18%	20%	14%	17%	24%	38%	38%	10%	9%	20%	14%	44%	8%	14%	18%	17%	
Sail boat 6m+	14%	17%	12%	15%	16%	12%	14%	14%	13%	16%	12%	15%	16%	17%	10%	12%	38%	15%	0%	13%	11%	15%	0%	14%	16%	16%	
Jet ski	30%	35%	35%	46%	38%	23%	15%	4%	26%	44%	42%	48%	30%	21%	32%	35%	38%	24%	44%	21%	32%	15%	24%	23%	19%	24%	
Dinghy (unpowered)	33%	39%	31%	37%	41%	23%	26%	36%	28%	53%	34%	49%	43%	40%	28%	28%	30%	30%	38%	41%	34%	41%	22%	53%	28%	31%	38%
Dinghy (with engine)	31%	36%	26%	36%	36%	28%	28%	30%	28%	53%	30%	44%	35%	38%	33%	27%	38%	36%	40%	25%	29%	31%	24%	62%	30%	27%	52%
Kayak	63%	64%	86%	74%	71%	60%	44%	33%	61%	72%	82%	53%	67%	66%	65%	55%	100%	68%	40%	75%	81%	72%	66%	77%	56%	58%	41%
Canoe / waka ama	22%	24%	27%	27%	30%	20%	15%	10%	18%	54%	36%	30%	24%	29%	20%	18%	38%	15%	10%	27%	22%	15%	15%	24%	24%	23%	
SUP	29%	29%	43%	46%	31%	19%	13%	5%	27%	49%	34%	20%	34%	30%	36%	36%	0%	14%	15%	13%	26%	28%	37%	24%	24%	30%	
Windsurfer	8%	11%	11%	12%	11%	8%	3%	3%	11%	12%	18%	10%	3%	7%	10%	11%	0%	13%	10%	5%	6%	15%	0%	0%	10%	6%	
Other	2%	1%	2%	2%	3%	2%	1%	0%	2%	0%	0%	0%	2%	0%	3%	6%	0%	0%	0%	3%	2%	0%	8%	1%	5%	0%	

Q1. Which of the following age groups are you in? / Q2. Do you best identify as... / Q3. Which ethnic group or groups do you identify with? / Q4. In which one of the following regions do you normally live? / Q5a. Can you tell me if you own, skipper or use any of the following types of vessels?

Base: NZers 16+ recreational vessel users (n=910)

*Caution: low base size (n<30)

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



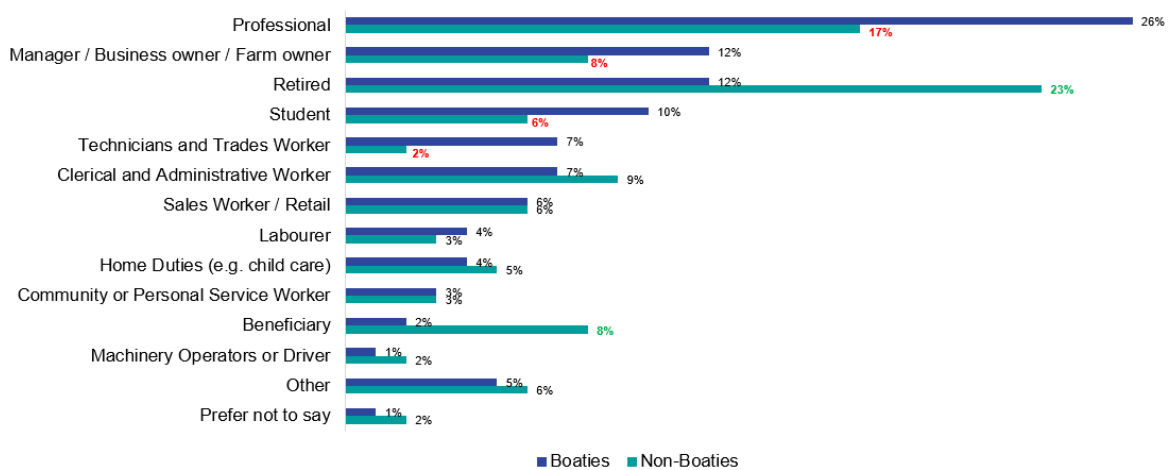
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2020 Participation Rates: Current Occupation

The following insights were evident when analysing the current occupation of boaties and non-boaties – income clearly has a part to play:

- Non-boaties are more likely to be retired than boaties (comprising 23% of non-boaties vs. 12% boaties).
- Boaties are more likely to be professionals (26%) than non-boaties (17%); and so understandably beneficiaries are less likely to be boaties (8% of the population are retirees who are non-boaties vs. 2% who are boaties).

Current Occupation of Boaties & Non-Boaties



Q4b: Which of the following categories best describes your current occupational group?
Base: NZers 18+ recreational vessel users (n=910), Non-Boaties (n=1,096)

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2020 Participation Rates: Vessel Type by Current Occupation

The following insights were evident when analysing the current occupation of boaties by vessel type:

- Boaties who are managers or business owners were most likely to use a larger power boats (41%), jet skis (41%) or larger sail boats (23%).
- Boaties who are professionals (70%) or students (80%) were most likely to use a kayak, while technicians and trades workers were most likely to use a jet ski (45%).
- Boaties who are retired are least likely to use a kayak (36%) or a jet ski (5%), which seems to reflect the more physical nature of these options.

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CURRENT OCCUPATION OF BOATIES

	Total	Current Occupation												Prefer not to say (n=13)*	
		Manager / Business owner / Farm owner (n=108)	Professional (n=238)	Technicians and Trades Worker (n=59)	Community or Personal Service Worker (n=28)*	Clerical and Admin Worker (n=65)	Sales Worker / Retail (n=58)	Machinery Operators or Driver (n=10)*	Labourer (n=34)	Retired (n=108)	Student (n=87)	Home Duties (e.g. child care) (n=35)	Beneficiary (n=22)*		Other (n=45)
Power boat up to 6m	44%	50%	43%	49%	34%	32%	37%	61%	52%	48%	39%	50%	47%	38%	33%
Power boat 6m +	29%	41%	28%	38%	13%	26%	33%	10%	34%	24%	31%	24%	22%	21%	16%
Sail boat up to 6m	16%	16%	16%	21%	8%	17%	15%	8%	24%	18%	15%	3%	17%	17%	26%
Sail boat 6m+	14%	23%	15%	5%	0%	17%	8%	9%	19%	15%	11%	5%	30%	6%	28%
Jet ski	30%	41%	34%	45%	15%	30%	40%	9%	27%	5%	33%	23%	21%	20%	28%
Dinghy (unpowered)	33%	40%	28%	39%	35%	27%	35%	0%	45%	37%	37%	32%	34%	22%	33%
Dinghy (with engine)	31%	32%	29%	40%	32%	31%	31%	24%	35%	34%	29%	26%	40%	29%	30%
Kayak	63%	67%	70%	66%	66%	62%	62%	12%	67%	36%	80%	57%	45%	68%	75%
Canoe / waka ama	22%	25%	25%	17%	21%	28%	34%	20%	26%	11%	24%	25%	23%	11%	9%
SUP	29%	37%	33%	33%	33%	30%	40%	0%	31%	3%	37%	19%	13%	22%	43%
Windsurfer	8%	14%	10%	10%	7%	6%	7%	0%	13%	3%	7%	0%	5%	5%	24%
Other	2%	3%	2%	4%	4%	0%	0%	0%	0%	0%	2%	0%	0%	6%	0%

Q4b: Which of the following categories best describes your current occupational group? / Q5a: Can you tell me if you own, skipper or use any of the following types of vessels?

Base: NZers 18+ recreational vessel users (n=910) *Caution: low base size (n<30)

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

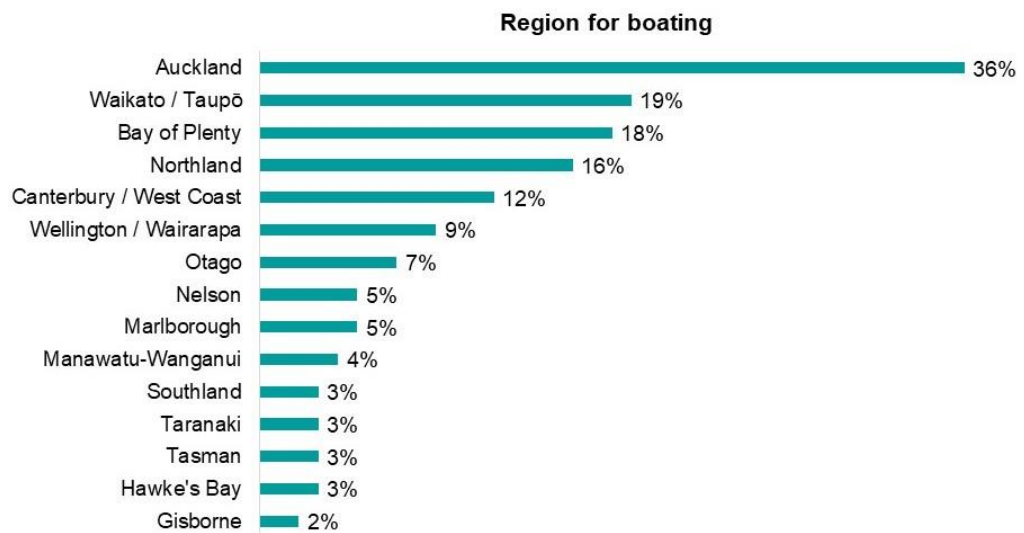


PARTICIPATION RATES

Boating Regions

Respondents were asked which regions they usually go boating in:

- Auckland was clearly the most popular region for boaties to use their recreational vessels in during the current year (36%).
- Waikato / Taupō (19%) and the Bay of Plenty regions (18%) were the next most popular.
- Gisborne was the least popular region in 2020 for recreational boating (2%).



Q16: Sometimes people go boating away from home. In which regions do you usually go boating?
Base: NZers 18+ recreational vessel users (n=910)

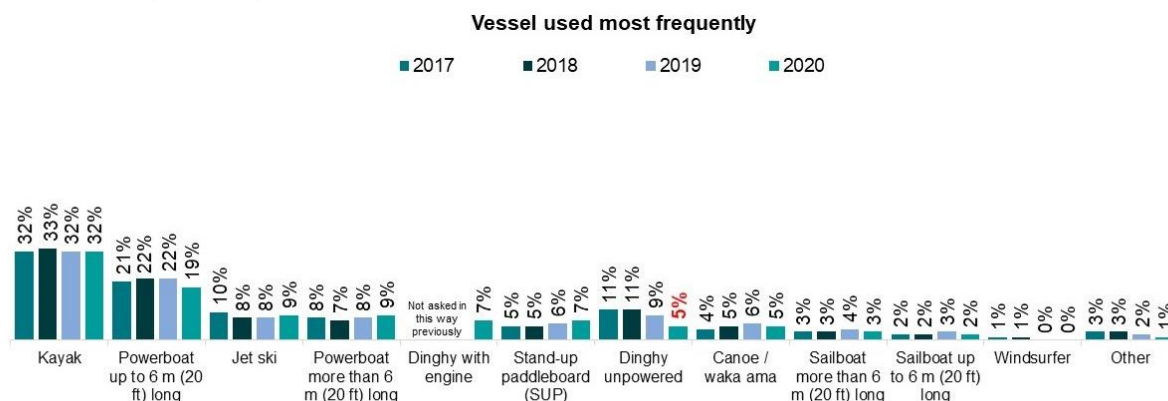
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Vessel Usage

Respondents were asked which vessel they use the most frequently:

- The most frequently used vessel in 2020 were kayaks (32%) – same as in 2019.
- This was followed by powerboats up to 6 metres (19%) and jet skis and powerboats over 6 metres (9% each).



Q14: Which one of these vessels do you use the most frequently? (single response)
Base: NZers 18+ recreational vessel users – 2020 (n=910), 2019 (n=900), 2018 (n=1,227), 2017 (n=902)
Note: 'Dinghy with engine' added to the list of vessel options in 2020.

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Significantly lower vs. previous wave is shown in red



Respondents owning at least one vessel (15% of adult New Zealanders) were asked how many of each type they owned. Understandably, cheaper, simpler vessels were the most common.

Boat type	No.	%	Average No. / Owner	Est. No. in NZ*
Kayak	286	32%	1.7	527,073
Power boat up to 6 metres long	117	13%	1.3	215,621
Stand-up paddleboard (SUP)	99	11%	1.3	182,448
Dinghy that is mostly used with an engine	95	11%	1.4	175,077
Dinghy or other unpowered / inflatable craft (powered only by oars)	77	9%	1.0	141,904
Jet ski	50	6%	1.0	92,146
Canoe / waka ama	49	5%	1.2	90,303
Power boat more than 6 metres long	44	5%	1.0	81,088
Sail boat up to 6 metres long	34	4%	1.1	62,659
Sail boat more than 6 metres long	20	2%	1.2	36,858
Other	18	2%	2.0	33,172
Windsurfer	14	2%	1.1	25,801

*Indicative extrapolation only, does not include fleets or vessels owned for commercial purposes.

Vessel Usage by Region

A comparison between the vessels used most frequently and the regions where boaties usually go boating reveals how vessel choice differs by region:

- Boaties in Nelson were most likely to use a kayak (51%), while those in Southland were least likely to do so (19%).
- Boaties in Southland were most likely to use a powerboat of up to 6 metres (39%), while those in Tasman were least likely to use this type of vessel (8%).

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Regions for boating

	Total	North-land	Auck-land	Waikato / Taupō	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu- Wanganui	Wellington/ Wairarapa	Tasman	Nelson	Marlborough	Canterbury / West Coast	Otago	Southland
Total	910	145	332	168	164	19*	33*	25*	33*	78	27*	41*	48*	101	61	25*
Powerboat up to 6 m (20 ft) long	19%	16%	17%	21%	21%	12%	19%	27%	24%	18%	8%	10%	32%	13%	29%	39%
Powerboat 6+ m (20 ft) long	9%	8%	12%	9%	10%	5%	6%	0%	3%	8%	11%	2%	9%	8%	7%	11%
Sailboat up to 6 m (20 ft) long	2%	3%	3%	3%	2%	0%	10%	0%	0%	3%	0%	0%	2%	0%	5%	4%
Sailboat 6+ m (20 ft) long	3%	5%	3%	1%	2%	5%	0%	0%	3%	3%	0%	0%	4%	2%	0%	0%
Jet ski	9%	7%	10%	9%	12%	5%	7%	7%	3%	11%	8%	8%	4%	13%	6%	4%
Dinghy - unpowered	5%	5%	5%	4%	6%	16%	3%	7%	12%	8%	0%	0%	2%	10%	0%	4%
Dinghy - with engine	7%	8%	4%	6%	8%	0%	6%	20%	9%	12%	9%	6%	15%	9%	8%	8%
Kayak	32%	37%	31%	32%	27%	27%	32%	25%	30%	28%	47%	51%	27%	29%	34%	19%
Canoe / waka ama	5%	5%	4%	6%	4%	23%	15%	5%	9%	5%	3%	2%	2%	8%	6%	0%
Stand-up paddleboard (SUP)	7%	7%	10%	8%	6%	5%	3%	9%	6%	5%	13%	17%	4%	7%	3%	11%
Windsurfer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	1%	0%	1%	1%	3%	0%	0%	0%	0%	1%	0%	3%	0%	1%	2%	0%

Q14: Which one of these vessels do you use the most frequently? / Q16: Sometimes people go boating away from home. In which regions do you usually go boating?

Base: NZers 18+ recreational vessel users (n=910). *Caution: low base size (<50).

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Significantly higher vs. Total is shown in green



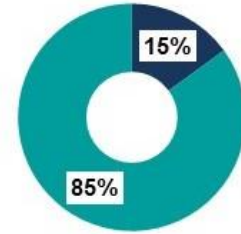
Vessel Ownership / Skippering

Respondents were asked if they owned, skippered, or used / hired a range of different vessels for recreational or leisure purposes only (i.e. not for commercial purposes):

- 15% of respondents indicated that they owned or skippered any of the vessels listed for recreational / leisure-based activities.
- Boaties in the Tasman region had the highest level of ownership or use (44%), followed by those in Northland, Waikato / Taupō, and Marlborough (40% each).
- The Hawke’s Bay and Manawatu-Wanganui regions had the lowest level of ownership or use (25% each).

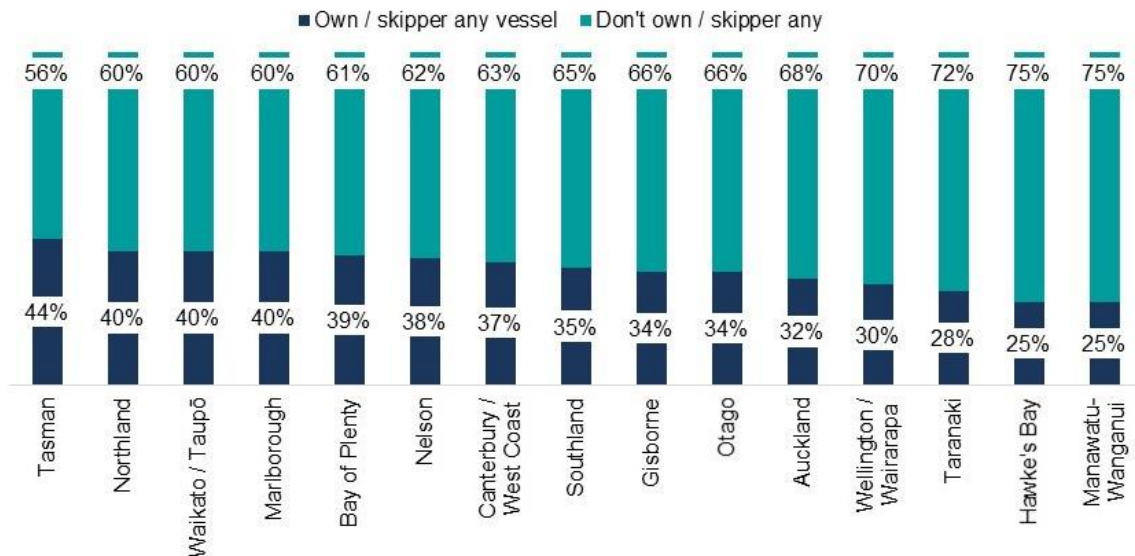
Vessel ownership overall

■ Own / skipper ■ Don't own / skipper



The higher ownership numbers for Northland and Tasman reflect their higher usage of kayaks.

Vessel ownership by region usually go boating in



Boaties were also asked if they owned, skippered, or used a range of different vessels, and they could select multiple options for the same vessel types for first time in 2020 (in previous years, this question allowed respondents to choose only one option per vessel type; therefore, comparisons with past years should be made with care):

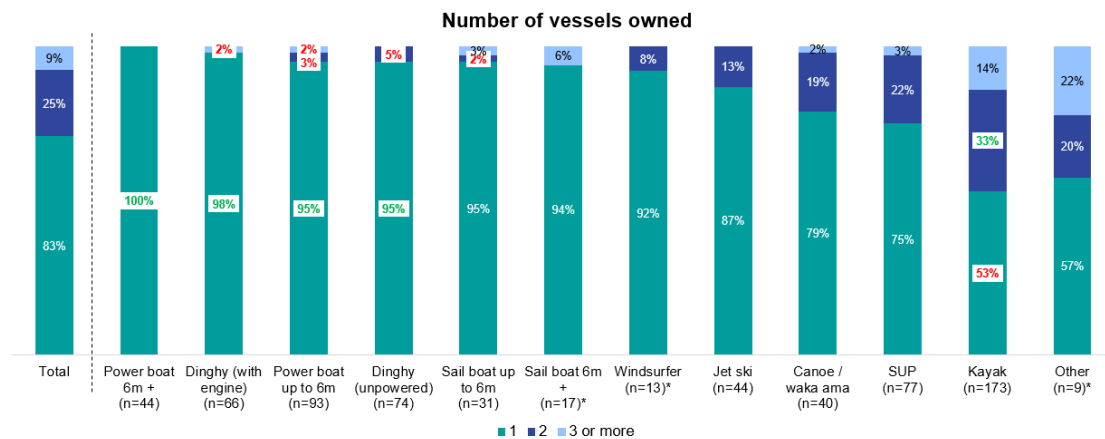
- Kayaks have the highest level of ownership across all four years (9% in 2020, 9% in 2019, 10% in 2018, and 8% in 2017), which complements the finding that this type of craft is the most frequently used vessel in the current year.
- Powerboats of up to 6 metres had the second highest level of ownership in 2020 (5% in 2020, 4% in 2019, 5% in 2018, and 5% in 2017).

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- In relation to kayaks, non-signallers were the sub-group with the highest level of ownership in the current year (22%), indicating that kayakers are less likely to take two forms of communication with them.
- Kayakers were also over-represented amongst the weather non-checkers, who were significantly more likely to spend time on kayaks than any other sub-group (48%).
- Lifejacket non-users were significantly more likely to be often in charge of or skipper powerboats of up to 6 metres that they do not actually own (9%).

Number of Vessels Owned

In 2020 respondents were asked for the first time how many vessels they own. As might be expected, people were more likely to own multiple vessels when the vessels in question were cheaper, e.g. SUPs, canoes and kayaks. Jetskis were the outlier in this regard and multiple jetski ownership could well reflect how those in higher earning professional occupations were more likely to own jetskis.



Q5b: Some people own more than one boat. Can you please indicate below how many of each boat listed below you own?
Base: NZers 16+ recreational vessel users who own their boat (n=351)

*Caution: low base

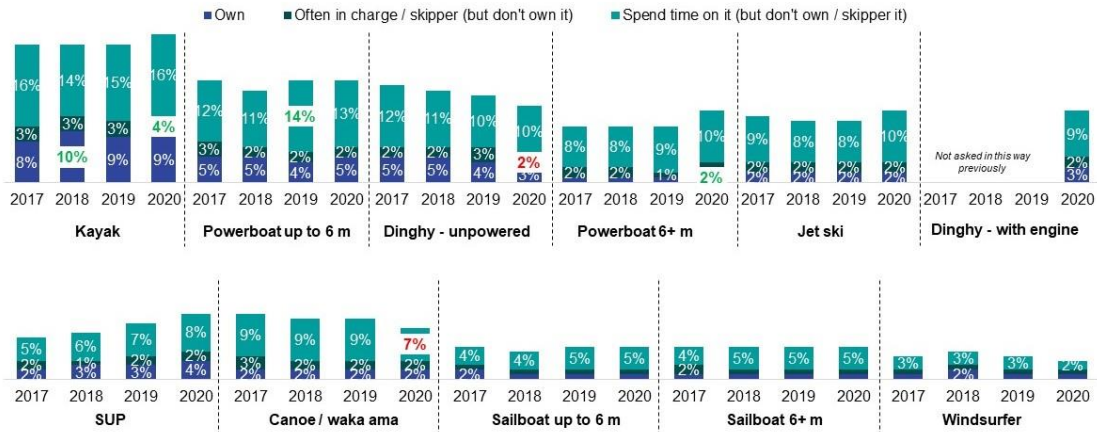
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Significantly lower vs. total is shown in red



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Vessel ownership, skippering and use



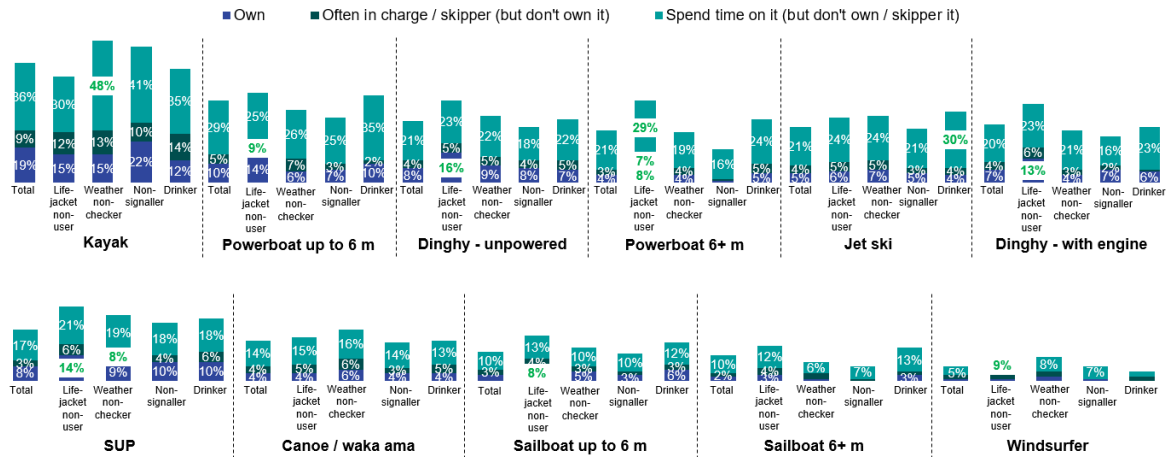
Q5a: Can you tell me if you own, skipper or use any of the following types of vessels?
Base: Total sample (n=2,006)

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



Vessel ownership, skippering and use



Q5a: Can you tell me if you own, skipper or use any of the following types of vessels?

Base: NZers 18+ recreational vessel users (n=910), Lifejacket non-users (n=199), Weather non-checkers (n=150), Non-signallers (n=293), Drinkers (n=136)

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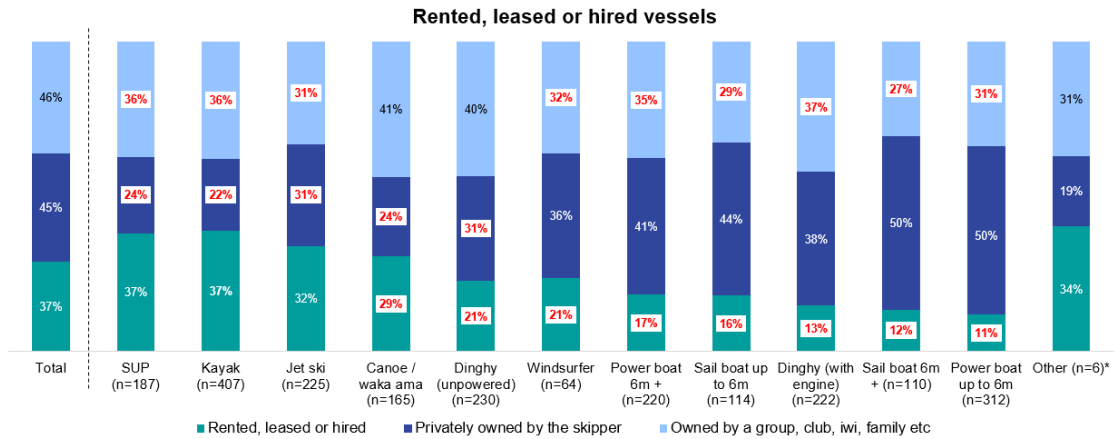
Significantly higher vs. total is shown in green



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Hireage of Vessels

In 2020 respondents were asked for the first time if they leased, hired or rented the vessels they used. The vessels most likely to be rented were those typical of lake or beach resorts where rental facilities are more common, i.e. SUPs, kayaks and jetskis.



Q8: You have mentioned using the boats listed below. Which if any of these are leased, hired or rented?
Base: NZers 18+ recreational vessel users who do not own their boat but often skipper & those do not own or skipper (n=772). 'Don't know' responses not shown.
*Caution: low base

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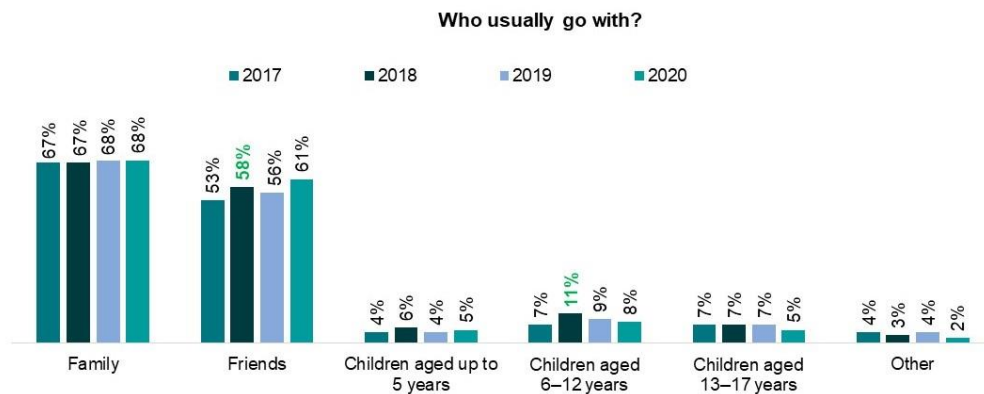
Significantly lower vs. total is shown in red



Boating Passengers / Company

Boaters were also asked who they usually go out on the water with:

- Family members were the most popular guests in 2020 (68%), which was the same as the previous year.
- Friends were also popular at 61% – an increase of 5 points from 2019 (56%).
- Children, teenagers, and others were much less likely to be invited on recreational boating excursions (all less than 10%).



Q20: Who do you usually go with on these trips on the <VESSEL SELECTED IN Q14>?
Base: NZers 18+ recreational vessel users who didn't select 'usually go out on my own' – 2020 (n=782), 2019 (n=751), 2018 (n=1,034), 2017 (n=768)

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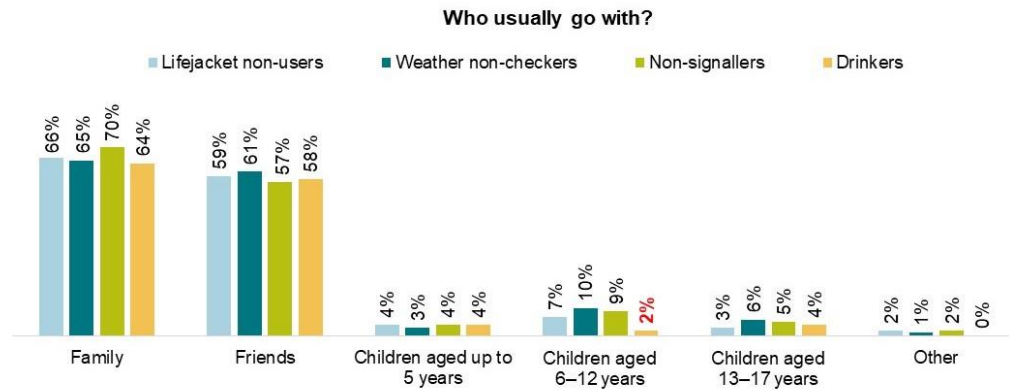
Significantly higher vs. previous wave is shown in green



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Further analysis reveals the following insights amongst the four key sub-groups of interest:

- Drinkers are significantly less likely to take children aged 6–12 years out on the water (2%).
- Drinkers are more likely to take family members on boating trips (64%) than friends (58%).
- Non-signallers are more likely to take family members on boating trips than any of the other three sub-groups (70%).



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

Base: NZers 18+ recreational vessel users who didn't select 'usually go out on my own' – Lifejacket non-users (n=171), Weather non-checkers (n=128), Non-signallers (n=242), Drinkers (n=122)

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Significantly lower vs. Total is shown in red

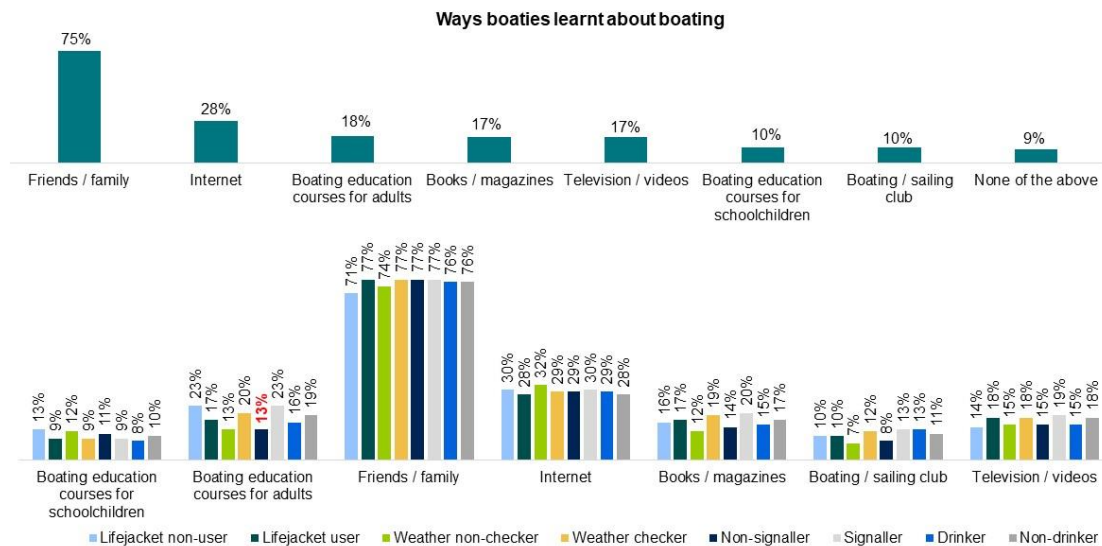


KNOWLEDGE / BOATING COURSES

This year boaties were asked a new question about the ways in which they had learnt about boating:

- 75% of all boaties reported gaining their knowledge about boating from their friends and family.
- 28% indicated they had learnt about boating from the internet, which was the second main source of knowledge.
- 18% gained their knowledge from boating courses specifically designed for adults.
- While the majority of the four safety sub-groups also learnt about boating from friends and family, lifejacket non-users were more likely to gain knowledge from boating education courses than any other group (23%). Rather than this meaning that such courses led to boaties being less likely to wear lifejackets, the result indicates how those taking formal courses were more likely to use large powerboats – and these vessel users are less likely to wear lifejackets.

Some of those using boating education courses felt that they were not very relevant or useful, with reasons varying from their not actively using many of the skills they had learnt, to information being perceived as either ‘basic stuff’ or not providing enough depth, and / or not retaining the knowledge some years later.



Q8b: Which, if any, of the following ways have you learnt about boating?

Base: NZers 18+ recreational vessel users (n=910), Lifejacket non-users (n=199), Lifejacket users (n=647), Weather non-checkers (n=150), Weather checkers (n=697), Non-signallers (n=293), Signallers (n=523), Drinkers (n=136), Non-drinkers (n=722)

*Note: New question added in 2020.

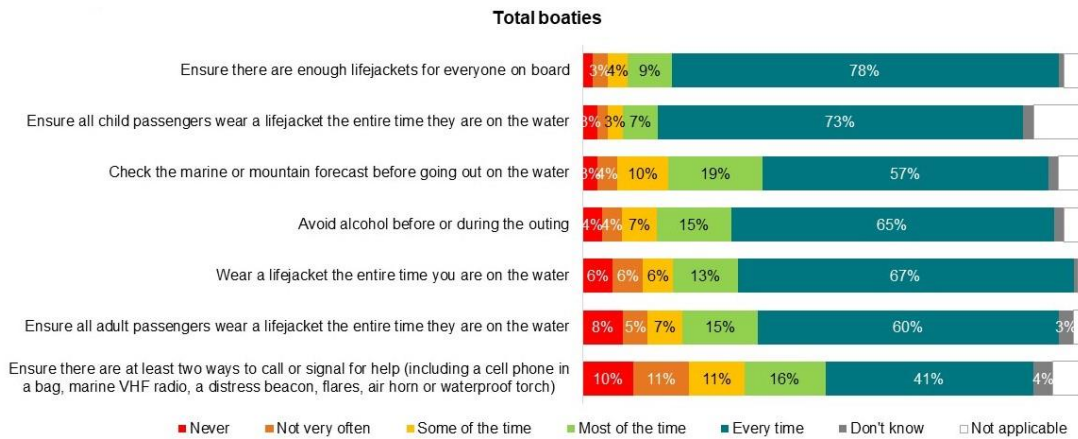
INCIDENCE OF SAFE / UNSAFE BOATING

Boaties' Behaviours

Boaties were asked how regularly they do a number of things relating to key safety measures when they are on board their most frequently used vessel.

Lifeflacket carriage and child lifeflacket usage are the safer boating behaviours that are more likely to be adhered to, but getting adults to wear lifeflackets at all times remains a problem.

Weather-checking incidence is also problematic, as is the carriage of at least two forms of communication.

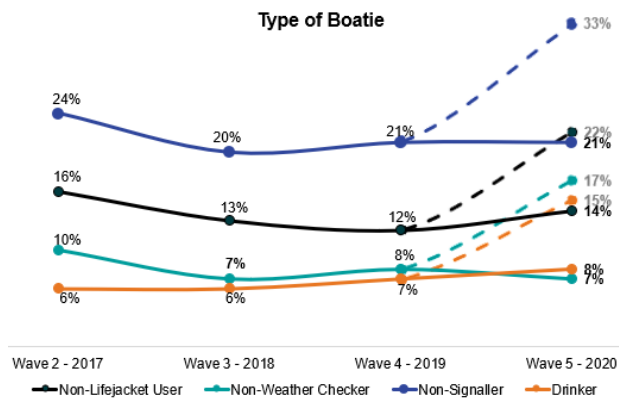


Q30: How regularly do you do each of the following things when using the <VESSEL SELECTED IN Q14>?
Base: NZers 18+ recreational vessel users (n=910)

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Prior to 2019, boaties who reporting doing at least one of the safety behaviours covered 'never' or 'not very often' were categorised as 'non-doers' of the activity in question (e.g. checking weather) so they could then be asked the appropriate follow-up questions pertinent to that behaviour (see the following section 'MAPS: Changing Boating Behaviour'). In 2020 we expanded this definition to include those who did the behaviour in question 'some of the time'. Using the previous definition, we see that there has been no significant change in reported levels of unsafe behaviours (the dotted lines show the increase in incidence using the widened definition).

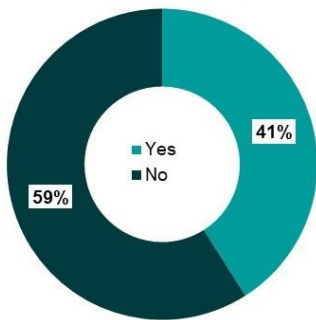


Non-Boaties

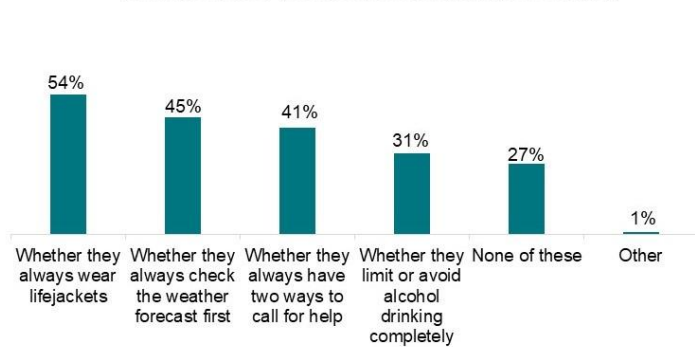
Non-boaties were asked if they have any close friends or family members who go boating on a regular basis and also what concerns them when the person closest to them regularly goes boating. This new section for non-boaties reveals the following insights:

- 41% of non-boaties have close friends and family who go boating regularly.
- ‘Always wearing a lifejacket’ is the number-one concern (54%), followed by ‘always checking the weather forecast first’ (45%).
- Slightly more than a quarter of non-boaties reported that ‘none of these’ safety-related behaviours concern them (27%).

Have friends / family who go boating



Concerns when person closest to you goes boating



Q41: Do you have any close friends or family members who regularly go boating? / Q42a: Thinking about the person closest to you who regularly goes boating, which, if any, of the following things concern you when he or she goes boating? (multi-response)
Base: Non-boaties (n=1,096), Non-boaties who have concerns when person closest to them regularly goes boating (n=454)
*Note: New question added in 2020 specifically for non-boaties.

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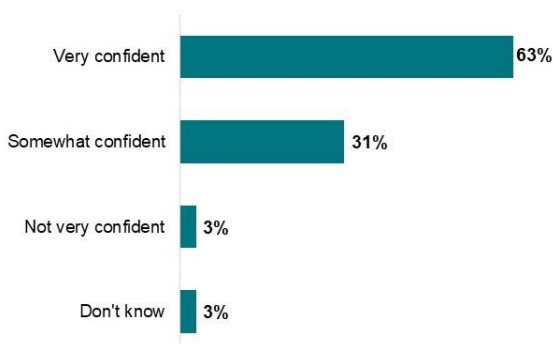


These respondents were also asked about their confidence in the level of necessary skills and experience that the person closest to them who regularly goes boating possesses to stay safe:

- 63% of non-boaties are ‘very confident’ in the skills and experience of their boatie.
- Only 3% are ‘not very confident’ in their boatie’s skill and experience levels.

This indicates that they will be unlikely to try and influence these boaties’ behaviours.

Confidence in boating family / friends’ skills and experience



This confidence will undermine their propensity to change the behaviours of their boating friends and family.

Q42b: How confident are you that this boatie has the necessary skills and experience to stay safe on the water?
Base: Non-boaties who have concerns when person closest to them regularly goes boating (n=454)
*Note: New question added in 2020 specifically for non-boaties.

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SAFE / UNSAFE BEHAVIOUR

Children and Lifejackets

Boaties were asked when they believe children should wear a lifejacket (when they are on their most frequently used vessel):

- 90% reported that children should wear a lifejacket ‘all the time’.
- The current year has also seen a significant decrease in the number of boaties who believe children should wear a lifejacket ‘only when the boat is underway’ (3% in 2020 vs. 6% in 2019). While this looks like just a 3-point drop, it means a halving of the previous proportion.
- A new option, ‘only if the child can’t swim’, was added for this question in 2020. Only 1% of boaties agreed with this answer.

In 2020 a new section was added to the survey to gauge non-boaties’ views on boating safety, including how they feel about children wearing lifejackets:

- 97% of non-boaties believe that children should wear a lifejacket ‘all the time’.
- While only 2% of non-boaties believe that children should wear a lifejacket only after a vessel ‘is underway’, 1% of this respondent group selected ‘none of the above’ or ‘children should not have to always wear a lifejacket’.



Q24: When they are on a <VESSEL SELECTED IN Q14>, when do you believe children should wear a lifejacket? / Q23b: When do you believe children should wear a lifejacket when they are on a recreational boat?
Base: NZers 18+ recreational vessel users – 2020 (n=910), 2019 (n=900), 2018 (n=1,227), 2017 (n=902), Non-boaties (n=1,096). *Note: New question added in 2020 specifically for non-boaties.

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Significantly lower vs. previous wave is shown in red



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Adults and Lifejackets

Boaties were also asked when they believe adults should wear a lifejacket (when they are on their most frequently used vessel):

- 74% of boaties reported that adults should wear a lifejacket ‘all the time’ in 2020, which was a 3-point increase from 2019 (71%).
- There has been a significant decrease in the belief that adults should wear a lifejacket only after a vessel ‘is underway’ (8% in 2020 vs. 12% in 2019).

Non-boaties were also asked how they feel about adults wearing lifejackets:

- 86% believe that adults should wear a lifejacket ‘all the time’.
- While 7% of non-boaties believe that adults should wear a lifejacket only after a vessel ‘is underway’, a further 4% indicated this action was necessary ‘only if the skipper believes there is a heightened risk’ (e.g. from rough water or while the boat is in open water).



Q26: When they are on a <VESSEL SELECTED IN Q14>, when do you believe adults should wear a lifejacket? / Q25b: When do you believe adults should wear a lifejacket when they are on a recreational boat?
 Base: NZers 18+ recreational vessel users – 2020 (n=910), 2019 (n=900), 2018 (n=1,227), 2017 (n=902), Non-boaties (n=1,096). *Note: New question added in 2020 specifically for non-boaties.



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2020 RECREATIONAL BOATING SURVEY – TOP-LINE RESULTS

Risk Perceptions

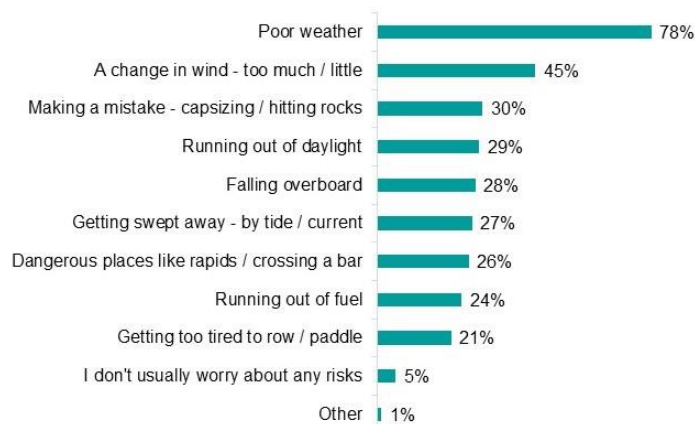
Boaties were asked a new risk assessment question in 2020 to explore the main risks that they or others on board think could affect their or others' safety when preparing for a normal boating trip:

- *Poor weather* (78%) and a *change in wind* (45%) were the two main risks identified by boaties.
- *Making a mistake such as capsizing or hitting rocks* (30%), *running out of daylight* (29%), or *falling overboard* (28%) are other safety-related risks that were identified in the preparation stage.

Further analysis revealed the following insights about risk and trip preparation amongst the four key sub-groups of interest. Understandably, a lower perception of risk is correlated with the likelihood of mitigating it:

- Lifejacket non-users are significantly less likely to consider *falling overboard* (21%) or *making a mistake* (20%) as primary risks.
- Weather non-checkers are significantly less likely to consider *poor weather* (69%) as a main risk.
- Non-signallers (who are more likely to use kayaks) are significantly more likely to consider *getting too tired to row or paddle* (28%) as a primary risk.
- While drinkers are significantly less likely to consider *falling overboard* (19%) as a main risk, this key sub-group are significantly more likely to consider *running out of fuel* (33%) as a primary risk. This reflects their greater propensity to use large powerboats.

Main risks considered that could affect the safety of those on board



Further analysis revealed that the risks considered when preparing for an excursion are specific to the type of vessel that boaties are using:

- SUP users are significantly more likely than other vessel users to report *getting swept away by a tide or current* (56%) or *dangerous places such as rapids or crossing a bar* (37%) as risks.
- Users of powerboats are significantly more likely to consider *running out of fuel* as a main risk with regard to safety (50% and 37% respectively).
- Users of smaller powerboats (up to 6 metres) are significantly less likely than other vessel users to report *dangerous places* as being a primary risk (18%).

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2020 RECREATIONAL BOATING SURVEY – TOP-LINE RESULTS

Most frequently used vessel type

Main risks considered that could affect the safety of those on board MAIN vessel	Total	Powerboat up to 6 m (20 ft) long	Powerboat 6+ m (20 ft) long	Sailboat up to 6 m (20 ft) long	Sailboat 6 m (20 ft) long	Jet ski	Dinghy - unpowered	Dinghy - with engine	Kayak	Canoe / waka ama	Stand-up paddleboard (SUP)	Wind-surfur	Other
Total	910	178	85	22**	24**	82	49	58	291	42	67	1**	11**
Poor weather	78%	78%	74%	76%	75%	70%	70%	92%	81%	77%	76%	100%	83%
A change in wind - too much / little	45%	46%	38%	49%	42%	36%	34%	65%	45%	54%	55%	100%	28%
Making a mistake - capsizing / hitting rocks	30%	24%	24%	41%	25%	32%	31%	34%	33%	43%	30%	0%	18%
Running out of daylight	29%	25%	21%	27%	15%	30%	31%	34%	32%	37%	33%	0%	20%
Falling overboard	28%	25%	25%	40%	24%	34%	34%	35%	27%	42%	23%	0%	10%
Getting swept away - by tide / current	27%	8%	9%	13%	4%	7%	44%	31%	40%	35%	56%	100%	37%
Dangerous places like rapids / crossing a bar	26%	18%	19%	23%	8%	20%	31%	20%	32%	34%	37%	0%	19%
Running out of fuel	24%	50%	37%	28%	30%	42%	15%	45%	3%	16%	4%	0%	10%
Getting too tired to row / paddle	21%	4%	6%	4%	0%	10%	34%	13%	38%	28%	30%	0%	18%
Battery / engine issues	0%	0%	1%	0%	0%	1%	2%	2%	0%	0%	0%	0%	0%
Lifejackets	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%
Other boats / vessels	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	2%	0%	0%
Other	1%	1%	2%	0%	4%	0%	2%	0%	1%	0%	1%	0%	8%
I don't usually worry about any risks	5%	7%	7%	0%	0%	4%	5%	2%	5%	4%	3%	0%	0%
I don't put myself / others at risk	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Main risks considered that could affect safety of those on board

Q40: When you are preparing for a normal trip on a <VESSEL_SELECTED>Q14>, what are the main risks you or others on board tend to consider that could affect the safety of you or others on board? / Q14: Which one of these vessels do you use the most frequently? / Q35a: How important is boating safety to you?

Base: NZers 18+ recreational vessel users (n=910). *Note: New question added in 2020. **Caution: low base sizes (<30).

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

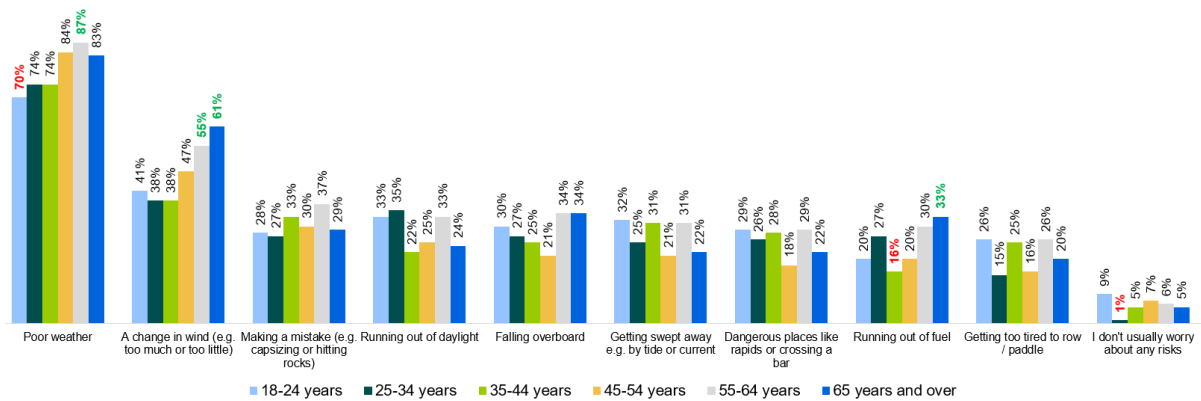


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Further analysis revealed that older boaties are significantly more likely to be more risk adverse:

- 55-64 year old boaties are significantly more likely than any other age group to consider *poor weather* (87%) as a primary risk, while 18-24 year old boaties are significantly less likely to consider this to be a primary risk (70%).
- 55-64 year old boaties and boaties 65+ years of age are significantly more likely than any other age groups to consider *a change in the wind* (55% and 61% respectively) as a primary risk.
- While boaties over 65 years of age are significantly more likely than any other age group to consider *running out of fuel* (33%) as a primary risk, 35-44 year old boaties are significantly less likely to consider this to be a primary risk (16%).

Main risks by age



Q40: When you are preparing for a normal trip on a <VESSEL SELECTED IN Q14>, what are the main risks you or others on board tend to consider that could affect the safety of you or others on board? / Q1: Which of the following age groups are you in?

Base: NZers 18+ recreational vessel users (n=910)

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



Further analysis revealed the following insights about risk and trip preparation by region:

- Boaties from the Waikato/Taupō region are significantly more likely than boaties from any other region to consider *poor weather* (88%) as a primary risk.
- Boaties from the Taranaki region are significantly more likely than boaties from any other region to consider *getting swept away* (47%) as a primary risk.
- Boaties from the Hawkes Bay region are significantly more likely than boaties from any other region to consider *running out of fuel* (46%) as a primary risk.
- Boaties from the Wellington/Wairarapa region are significantly less likely than boaties from any other region to consider *getting too tired to row / paddle* (11%) as a primary risk.

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MAIN PERCEIVED RISKS BY REGION

	Total	Region													
		Northland (n=42)	Auckland (n=328)	Waikato/ Taupo (n=89)	Bay of Plenty (n=68)	Gisborne (n=3)*	Hawke's Bay (n=28)*	Taranaki (n=21)*	Manawatu- Wanganui (n=41)	Wellington /Wairarapa (n=83)	Tasman (n=7)*	Nelson (n=13)*	Marlboro ugh (n=13)*	Canterbury/ West Coast (n=115)	Otago (n=42)
Poor weather	78%	82%	76%	88%	80%	32%	84%	71%	76%	83%	85%	83%	72%	80%	76%
A change in wind	45%	55%	41%	52%	43%	53%	38%	43%	41%	85%	53%	52%	44%	59%	53%
Making a mistake	30%	27%	28%	31%	28%	25%	32%	28%	30%	40%	23%	44%	36%	27%	53%
Running out of daylight	29%	27%	26%	35%	38%	33%	23%	30%	24%	12%	24%	23%	29%	38%	42%
Falling overboard	28%	32%	29%	23%	31%	23%	28%	29%	31%	25%	47%	31%	27%	21%	42%
Getting swept away	27%	24%	28%	27%	28%	20%	47%	30%	21%	40%	37%	25%	22%	33%	31%
Dangerous places like rapids or crossing a bar	26%	21%	26%	27%	26%	23%	34%	38%	18%	28%	29%	23%	22%	31%	25%
Running out of fuel	24%	34%	22%	26%	30%	46%	23%	14%	25%	15%	32%	36%	19%	24%	35%
Getting too tired to row / paddle	21%	18%	20%	23%	32%	13%	19%	28%	11%	40%	37%	23%	27%	24%	19%
Battery/engine issues	0%	2%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
I don't usually worry about any risks	5%	2%	4%	0%	6%	6%	9%	7%	7%	0%	8%	0%	7%	2%	19%

Q40: When you are preparing for a normal trip on a <VESSEL SELECTED IN Q14>, what are the main risks you or others on board tend to consider that could affect the safety of you or others on board? / Q4: In which one of the following regions do you normally live in?

Base: NZers, 18+ recreational vessel users (n=910) *Caution: low base size (n<30)

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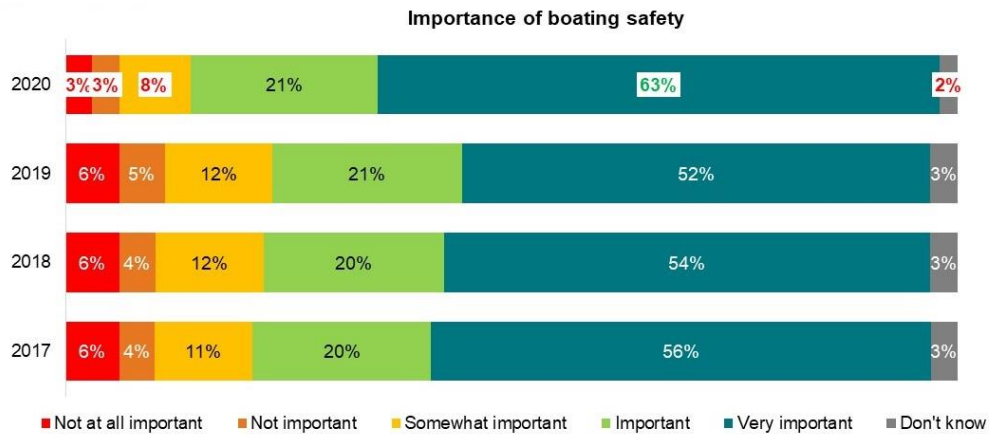
Significantly higher vs. total is shown in green
Significantly lower vs. total is shown in red

MARITIME NZ
2020 RECREATIONAL BOATING SURVEY – TOP-LINE RESULTS

Importance of Boating Safety

All respondents were asked how important boating safety is to them personally:

- 63% reported that boating safety was ‘very important’ to them in 2020, which was a significant increase from the previous year (52% in 2019).
- The proportion of respondents for whom boating safety is ‘important’ has remained relatively steady since 2017.



Q35a: How important is boating safety to you personally?
Base: Total sample – 2020 (n=2,006), 2019 (n=2,004), 2018 (n=3,101), 2017 (n=2,122)

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



Boating Safety – Anecdotes

Boaties and non-boaties were asked about a situation where they have *gone out on the water despite their own or others' concerns about the safety of the trip* to offer insights about what can lead people into unsafe boating situations. The following quotations provide informative snapshots.

Example Boaties' Stories

“My brother-in-law once bought a boat from Trade Me without either seeing it or doing a sea trial. He knew nothing about boating and the whole exercise was a disaster. Blown engine on the first outing, nearly sank the boat when he took us out, didn't know basic rules (passing, different markers, etc.). We tried to advise him, but he wouldn't listen.”

“I was surf-kayaking in Waihi when a pod of orcas arrived that were seen as a big threat by friends on the beach. They didn't do anything to us so much as we kayaked along with them for about 5 minutes before they swam off. Friends were worried about what they saw happening as a death risk. I didn't approach the orcas so much as just regular kayaking when they started moving along with me.”

Example Non-Boaties' Stories

“My son-in-law often goes boating and takes the kids with him. I once asked the kids if they were wearing a lifejacket and they said no. When I asked their father why they weren't wearing them, he said it was too hot and the water was calm and mild.”

“I was out on a sailboat with my friend and her family and I wasn't a very confident swimmer personally, so was quite scared and it was quite windy, meaning the boat was rocking and the people on the boat weren't balanced. Everyone was on one side and the sailboat capsized.”

Boaties and non-boaties were also asked to recall *a situation where they or someone they know have not gone boating because the trip was thought to be too unsafe*. These included:

Example Boaties' Stories

“My husband and I have travelled from home down to Foxton to launch the boat but decided when we got there that the wind had got up and the sea had too many whitecaps, so turned around and came back home. We've done that more than once.”

“My teenage son wanted to take the boat out fishing by himself, but we said not until he has completed his Coastguard Day Skipper and VHF courses. He has just completed both, so now has to take his Dad out for his final test (at Level 2 Covid).”

Example Non-Boaties' Stories

“Two of my sons own boats. They always check the tides and the weather; and make sure their families all wear lifejackets. I'm very confident they are doing the right and safe things.”

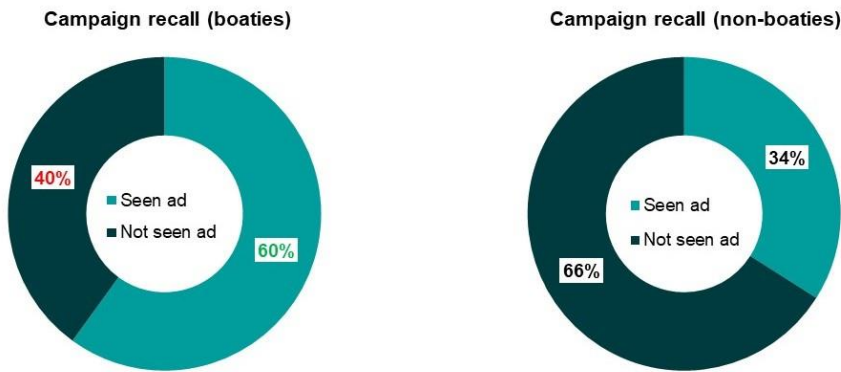
“My sister and her husband turned down invitation to go for a sail with my son on his dad's boat when they saw the beer and bottles of wine.”

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Advertising Recall

Both boaties and non-boaties were asked if they could recall seeing any advertising that comprise Maritime NZ's safety campaign from October 2019 onwards.

Some 60% of boaties recalled Maritime NZ advertising, which was understandably higher than the recall levels of non-boaties (34%).



Q36a: Which of the following can you recall seeing or learning about since last October? / Q3: Can you tell me if you own, skipper or use any of the following types of vessels?
Base: NZers 18+ recreational vessel users (n=910), Non-boaties (n=1,096)

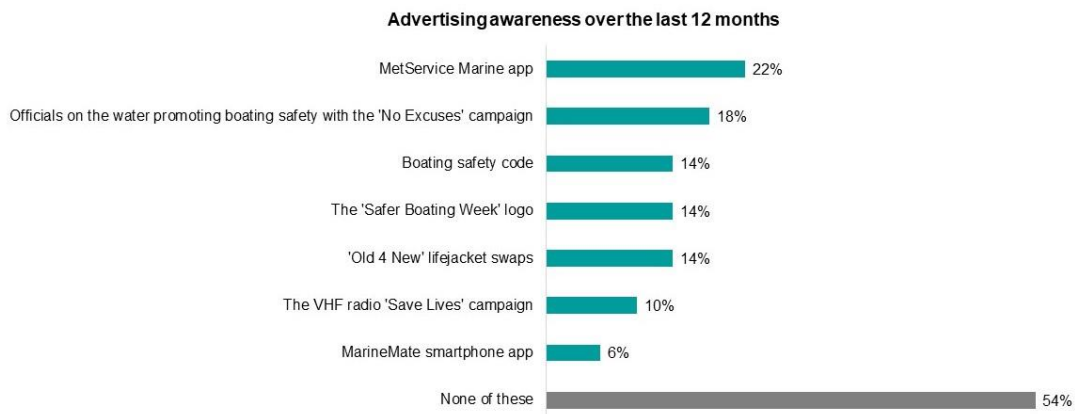
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Significantly higher vs. non-boaties is shown in green
Significantly lower vs. non-boaties is shown in red



Boaties and non-boaties were also asked which advertising from Maritime NZ they could specifically recall seeing from October 2019 onwards:

- The advertising with the highest recall overall was the MetService Marine app (22%).
- This was followed by the 'No Excuses' campaign (18%), the Boating Safety Code (14%), and the 'Safer Boating Week' logo (14%).
- More than half of all respondents reported that they had not seen any advertising material from Maritime NZ (54%).



Q36: Which of the following can you recall seeing or learning about since last October?
Base: Total sample (n=2,006)

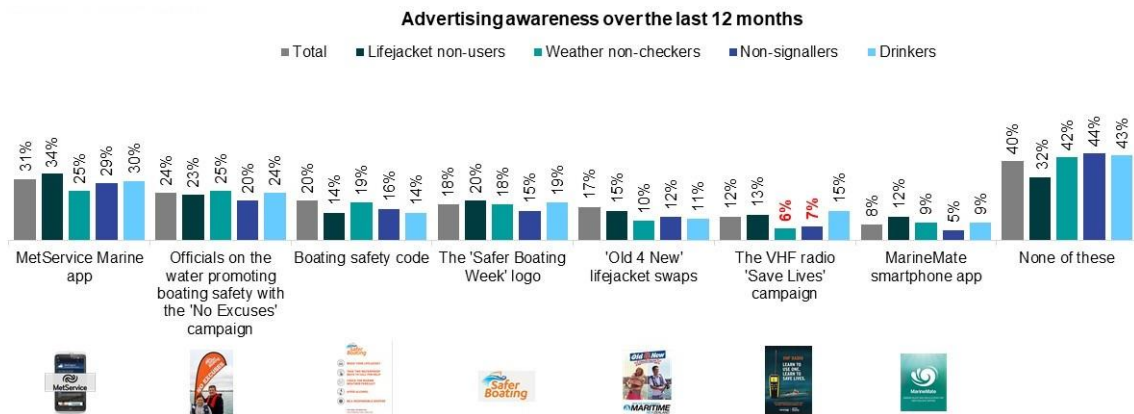
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Further analysis in relation to advertising awareness revealed some clear similarities and differences between boaties and the four key sub-groups:

- The MetService Marine app advertising had the highest recall overall amongst boaties (31%), followed by the 'No Excuses' campaign (24%), the Boating Safety Code (20%), and the 'Safer Boating Week' logo (18%).
- 40% of boaties reported that they had not seen any advertising material from Maritime NZ.
- The MetService Marine app advertising had the highest awareness amongst lifejacket non-users (34%).
- Weather non-checkers (6%) and non-signallers (7%) were significantly less likely to have seen the VHF radio 'Save Lives' campaign.



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

Base: NZers 18+ recreational vessel users (n=910), Lifejacket non-users (n=199), Weather non-checkers (n=150), Non-signallers (n=293), Drinkers (n=136)

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Significantly lower vs. total is shown in red



MAPS: CHANGING BOATING BEHAVIOUR

Underlying Theory

The questionnaire used the Ipsos MAPS model of behavioural change, which contends there are four areas in which behaviour is influenced (and this influenceable). These are:

- M. Motivational Factors (e.g. risk–reward calculations)
- A. Ability Factors (e.g. knowledge or skills)
- P. Physical Factors (e.g. access to requisite tools or equipment)
- S. Social Factors (e.g. peer pressure, social norms)

This model was used to better understand the barriers that exist in relation to the four key behaviours 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

A Note on Reporting

We assessed respondents’ attitudes regarding safer boating behaviours by asking the extent to which they agreed or disagreed with a series of attitudinal statements designed to reflect the MAPS factors in relation to each safety behaviour. To avoid problems with the questionnaire’s inferring ‘correct’ behaviours, the statements used presented a mix of desirable and undesirable safety attitudes. Therefore, we have indicated the answers that we desire to see in the following tables using blue text.

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Lifejacket Attitudes – Lifejacket Non-Users

Lifejacket non-users exhibited the desirable response for 11 of the 12 statements shown in the table below.

There has been good progress with the belief that lifejackets should be worn at all times – in 2020 lifejacket non-users are significantly more likely to agree that ‘The people I normally go boating with all agree that lifejackets are important to wear at all times’ (57% agree vs. 37% agree in 2019), and they are reportedly less embarrassed to encourage others to wear lifejackets (13% embarrassed vs. 27% in 2019).

The main problem remains the belief that ‘It is OK to wear put on a lifejacket only when the conditions get rough’, as 44% of lifejacket non-users believe this.

Lifejacket non-users’ behaviour when boating

NB: To reduce respondent burden, those categorised as belonging to more than one unsafe-boating group were asked this set of questions in relation to only one form of unsafe boating. Therefore, the base sizes for the MAPS questions are smaller than the total number of people reporting the unsafe behaviour in question – there were 159 Lifejacket Non-Users in total, but only 113 were actually asked the MAPS questions about lifejacket wearing.

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned with the potential for drownings to occur	60%	19%	22%
I would be embarrassed to encourage others to wear lifejackets	▼13% (27%)	69%	18%
My opinion about lifejackets doesn't make a difference	26%	50%	24%
I am not confident about getting everyone on board to wear lifejackets	28%	45%	27%
I believe that lifejackets are important to wear at all times	56%	22%	22%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to use lifejackets properly	78%	14%	8%
There are not always enough lifejackets for everybody on board	23%	63%	▼14% (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	▲57% (37%)	▼19% (42%)	24%
It's up to individuals whether they decide to wear lifejackets or not	39%	45%	16%
I only wear a lifejacket if others are also wearing them	21%	58%	21%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
Using lifejackets is convenient and comfortable	43%	34%	23%
It is OK to put on a lifejacket only when the conditions get rough	44%	37%	19%

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 16+ recreational vessel users – Lifejacket non-users (n=113)

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▲▼ Significantly higher / lower compared to 2019 scores

Note 1: % in this colour represent the desirable response for that behaviour.

Note 2: The numbers displayed in brackets represent last year's figures.



Interventions for Lifejacket Non-Users

With 44% of lifejacket non-users believing that ‘It is OK to put on a lifejacket only when the conditions get rough’, there is a need to raise awareness of the fact that people can fall still overboard and get into trouble even in calm conditions. Rather than just encouraging lifejacket usage per se, promotions should specify how they are needed regardless of conditions.

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Weather-Checking Attitudes – Weather Non-Checkers

Weather non-checkers exhibited the desirable response for 11 of the 15 statements shown in the table below.

In 2020 weather non-checkers are significantly more likely to agree with the statements ‘There is always somebody with a marine VHF radio operator’s qualification on my boat trips’ (28% agree vs. 0% in 2019) and ‘There is a suitable marine VHF radio on the vessel I usually go boating on’ (52% agree vs. 11% in 2019). This means that although incidence of the ideal behaviour is still lower than desired, improvements have been recorded.

Weather non-checkers’ behaviour when boating

NB: To reduce respondent burden, those categorised as belonging to more than one unsafe-boating group were asked this set of questions in relation to only one form of unsafe boating. Therefore, the base sizes for the MAPS questions are smaller than the total number of people reporting the unsafe behaviour in question – there were 150 Weather Non-Checkers in total, but only 109 were actually asked the MAPS questions about weather-checking.

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned with the potential for the weather to become worse while on my normal boating trips	60%	15%	25%
I would be embarrassed to encourage others to check the weather	11%	77%	12%
I would be embarrassed to encourage others to change the trip plans because of the weather	13%	77%	10%
My opinion about the weather doesn't make a difference	17%	63%	20%
I am not confident about getting everyone on board to pay attention to the weather	28%	47%	24%
I believe that weather forecasts are important to consider at all times	76%	10%	15%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to get the maritime / mountain weather forecasts	41%	37%	22%
I know how to use VHF maritime radio services when on the water*	26%	50%	24%
There is always somebody with a marine VHF operator’s qualification on my boat trips*	▲ 28% (0%)	49%	23%
I know the call sign for the vessel I usually go boating on*	26%	48%	26%
I understand all the parts of the weather forecast	45%	33%	▲ 23% (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	62%	14%	24%
I will let others decide what to do regardless of the weather forecast	23%	53%	25%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
There is a copy of the Maritime NZ Radio Handbook on the vessel I usually go boating on*	22%	45%	33%
There is a suitable VHF radio on the vessel I usually go boating on*	▲ 52% (11%)	▼ 27% (56%)	21%

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

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 vessel users – Weather non-checkers (n=109). *Caution: low base size (n<30).

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▲ ▼ Significantly higher / lower compared to 2019 scores

Note 1: % in this colour represent the desirable response for that behaviour.

Note 2: The numbers displayed in brackets represent last year’s figures.



Interventions for Weather Non-Checkers

The two biggest problems regarding weather-checking concern boaties’ inability to use marine VHF radio services when on the water and the absence of a Maritime NZ Radio Handbook on the vessel usually used.

Therefore, we recommend that Maritime NZ consider the provision of free Maritime NZ Radio Handbooks (e.g. distributed at marinas or delivered directly to boats), and the development of VHF radio usage instruction stickers to be placed by radios. These could be distributed through avenues such as boating magazines, clubs, marinas, boat ramps, and on-water checks. The stickers or handbooks should allow boaties to write their vessel call-signs on them (see the following section).

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Communication Attitudes – Non-Signallers

Non-signallers exhibited the desirable response for only 5 of the 14 statements shown in the table below. This year, non-signallers are significantly more likely to agree with the following statements:

- ‘I would be embarrassed to encourage others to take emergency communications devices’ (82% agree vs. 70% in 2019)
- ‘I believe that it is important to have at least two emergency communications devices on board at all times’ (56% vs. 38% in 2019)
- ‘The people I normally go boating with all agree that at least two forms of communication are carried’ (37% agree vs. 19% in 2019)

This indicates that while people are increasingly likely to value having two forms of communication and to believe that their fellow boaties value this too, they are less likely to risk social stress by encouraging others they are boating with to take sufficient devices.

Non-signallers’ behaviour when boating

NB: To reduce respondent burden, those categorised as belonging to more than one unsafe-boating group were asked this set of questions in relation to only one form of unsafe boating. Therefore, the base sizes for the MAPS questions are smaller than the total number of people reporting the unsafe behaviour in question – there were 293 Non-Signallers in total, but only 137 were actually asked the MAPS questions about emergency communications.

Motivational Factors	AGREE	DISAGREE	NEITHER / DK
I am concerned that I may need to call for help while on my normal boating trips	33%	49%	18%
I would be embarrassed to encourage others to take emergency communications devices	7%	▲82% (70%)	12%
My opinion about emergency communications devices doesn't make a difference	15%	44%	41%
I believe that it is important to have at least two emergency communications devices on board at all times	▲56% (38%)	▼14% (28%)	30%
Ability Factors	AGREE	DISAGREE	NEITHER / DK
I know how to use distress / emergency beacons	39%	50%	11%
I know how to use VHF maritime radio services when on the water*	30%	57%	14%
There is always somebody with a marine VHF operator's qualification on my boat trips*	21%	52%	26%
I know the call sign for the vessel I usually go boating on*	19%	60%	21%
I know how to use distress flares	36%	50%	14%
Social Factors	AGREE	DISAGREE	NEITHER / DK
The people I normally go boating with all agree that at least two forms of communication are carried	▲37% (19%)	34%	29%
I usually let others manage the communications devices	44%	36%	20%
Physical Factors	AGREE	DISAGREE	NEITHER / DK
There are distress / emergency beacons on the vessel I usually go boating on (including EPIRBs and PLBs)	▲20% (9%)	54%	27%
There are distress flares on the vessel I usually go boating on	20%	58%	23%
There is a suitable VHF radio on the vessel I usually go boating on*	21%	57%	21%

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

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 vessel users – Non-signallers (n=137). *Caution: low base size (n<30).

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▲▼ Significantly higher / lower compared to 2019 scores

Note 1: % in this colour represent the desirable response for that behaviour.

Note 2: The numbers displayed in brackets represent last year's figures.



Interventions for Non-Signallers

Non-signallers are the boatie sub-group least likely to be compliant with the desired responses for their boating behaviour. Given they exhibited the desirable response for only 5 of the 14 statements asked, interventions are suggested for the two behaviours which had the least compliance.

Just 19% of non-signallers knew the call sign for the vessel they usually go boating on. As this needs to be used in conjunction with the vessel radio, we recommend that any radio-use instructions (see the previous section) allow for the vessel call-sign to be written on them.

Some 58% of non-signallers reported the absence of distress flares on the vessel they usually go boating on. As these require a one-off specific purchase and on-board storage, we believe that interventions similar to those used for lifejackets be investigated, e.g. subsidised price deals and increased awareness.

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Drinking Attitudes – Alcohol Drinkers

Although drinkers exhibited desirable responses for 8 of the 11 statements shown in the table below, there were no significant changes in 2020.

This means that the problematic issue remains people’s reluctance to try and reduce other people’s drinking, with 54% believing it is individuals’ choices to make.

Additionally, over half of the drinkers feel that alcohol is safe to drink for their kind of boating (which we know to be disproportionately more likely to be larger powerboats).

Drinkers’ behaviour when boating

NB: To reduce respondent burden, those categorised as belonging to more than one unsafe-boating group were asked this set of questions in relation to only one form of unsafe boating. Therefore, the base sizes for the MAPS questions are smaller than the total number of people reporting the unsafe behaviour in question – there were 136 Drinkers in total, but only 106 were actually asked the MAPS questions about avoiding alcohol while 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	61%	19%	20%
I would be embarrassed to encourage others to drink less alcohol while boating	22%	51%	27%
My opinion about alcohol doesn't make a difference	36%	27%	37%
I am not confident about getting everyone on board to reduce their alcohol consumption	30%	38%	32%
Ability Factors			
I know how to reduce on-board alcohol consumption to avoid problems	52%	20%	28%
Operating a boat when drunk is illegal	72%	14%	14%
Social Factors			
Those I normally go boating with all agree that alcohol consumption should be minimised when on the water	49%	26%	24%
It is up to individuals whether they decide to drink alcohol or not	54%	25%	21%
I reduce my alcohol consumption only if others are also drinking less	20%	54%	26%
Physical Factors			
It is easy to ensure less alcohol is drunk on board	55%	23%	22%
It is OK to drink alcohol for the type of boating I usually do	57%	22%	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 vessel users – Drinkers (n=106)

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Note: % in this colour represent the desirable response for that behaviour.



Interventions for Drinkers

The main challenge in reducing on-board alcohol consumption is the **social** pressures that inhibit people’s likelihood of trying to reduce others’ drinking – people feeling that it is up to individuals to decide, and that they would be embarrassed and ineffective if they tried to reduce another boatie’s drinking. To address this behaviour, drinkers would potentially benefit from guidance on how to set the default position of not drinking on board and how this could be framed as the ‘collective responsibility’ of all passengers.

There is also a **physical** factor, in that 57% of drinkers agreed that ‘It is OK to drink alcohol for the type of boating I usually do’ – i.e. the nature of their boating is felt to be acceptable regarding alcohol consumption. These drinkers were notably more likely to be large powerboat users. Therefore, we recommend that the aforementioned drinking-reduction / avoidance messages be tailored to target those in large powerboats.