

# *Boating Industry Snapshot*

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## **Drivers of Growth in Victoria**



# Mission of the BIA Victoria

The BIAV is the voice of the industry. Its membership base represents over 80% of the state's recreational boating industry including manufacturing, wholesale, retail and service businesses. Members are united in their goal for improvement and regulation of the boating industry. The BIAV is committed to promoting recreational boating in a safe and environmentally friendly way - and we're focused on promoting professional standards and services for our members and the boating public.

# Drivers of Growth

- 01 Access to Water
- 02 Employment & Training
- 03 Public Education
- 04 Strong Manufacturing
- 05 Destination Boating

# Victorian Boaters



## INDUSTRY

Industry members are likely to be male (80%), aged in their 30s or 40s (65%), living in a metro area (59%). More than half have been in the industry for over 20 years. The most represented areas are marine equipment retailing, boat dealership and distribution, boat manufacturing and marine equipment manufacturing.  
Source: 2014 Boating Census

## COMMUNITY

The core user group are likely to be men (91%) aged in their 40s or 50s (72%), living in a regional area (52% vs 48%). A typical boating trip is half day with friends or family in Westernport or Port Phillip. The current boat is likely to be a 4 – 6 metre cuddy-cabin with a single outboard.

Source: 2014 Boating Census



# Industry Size & Scope

Contributes \$4.5 billion to the Victorian economy annually

- 17,700 full-time jobs
- 268,336 marine license holders
- 172,000 registered boats
- 10% of the Victorian population aged over 14 (representing 477,000 people) own a water-craft, including a motorboat, speedboat, yacht with keel or other sailboat, jet-ski, canoe, row-boat or windsurfer
- Roy Morgan indicates there are 996,000 people (Victoria and Tasmania) who spend time each year in the marine industry
- Over 90% of Victorian recreational vessel registrations are trailed boats which are less than 8m in length
- 68% of Victorian registered boats are operated on Port Phillip and Westernport each year

## APPLIANCE OWNERSHIP IN VICTORIA



Source: Roy Morgan September 2014

‘There are more owners of water-craft than caravans or motorbikes in Victoria’

# 01

## Access to Water

**I**mproving the quality and availability of ramps will be the single biggest driver to increased boating participation. The finding comes from the 2014 Boating Census, a major piece of research commissioned by the BIAV.

The study identified that more ramps, better quality ramps and more parking will encourage greater boat usage on our waterways.



“Demand for boating on the Bays is only going to increase.”

Ernst & Young

### Demand Set to Increase

The Bays, which integrate a range of recreational and commercial activities, are the state’s primary boating destination for both locals and visitors, and it is expected that demand for boating on the Bays is only going to increase in the future. The increase in popularity of other water sports such as windsurfing, kite surfing and jet skiing, and an increasing population in the greater Melbourne district and in coastal areas such as Wyndham and Geelong is further likely to increase demand by locals and visitors wishing to engage in such recreational activities.

These improvements include the provision of additional parking and holding berth facilities.

While boat ownership demand is impacted by population growth along with increasing household recreational spend and increasing Gross State Product, the ability to realise increasing demand is constrained by the limited supply of boating support infrastructure and facilities along with the low supply of events and activities on and around the Bays. This constraint will become more pronounced in the future with the established trend of increasing boat sizes.

Source: Ernst & Young

### Implication

As participation rates grow, more infrastructure will need to be located around population centres, holiday destinations and seasonal ‘hot spots’

# 02

## Employment & Training

**R**ecruitment and apprenticeships are a major opportunity. Boat building and repair businesses are looking to industry for training and support.

To be successful, the government and industry must continue to foster educational standards and promote a career pathway.

The boating industry is engaging schools and community to

encourage new people to join – and help imagine a lifelong career. A united approach, reviewing and monitoring the education pathway, will make it a profession – and industry people want to join.

This focus should include the formal education system (TAFE, RTO, etc) and the informal education system (workshops, seminars, etc).



“Concern is not so much the apprentices being available but the quality of education and training they can access.”

The Boating Census

### Some upcoming initiatives, supported by the BIAV:

- Melbourne Boat Show education and career promotion
- Melbourne Boat Show Yearbook content, showcasing careers in the boating industry
- Building a boat on site at the Melbourne Boat Show
- BIAV Apprentice of the Year
- BIAV Breakfast Briefings
- BIAV Marine Industry Careers Guide

### Implication

Attracting and retaining skilled employees is a major opportunity for the boating industry

# 03

## Public Education

There is a perception that boating is expensive and difficult to participate in. To overcome these barriers the BIAV has recently launched its summer marketing campaign, Life's Better with a Boat.

Using the power of social and digital media - and our members channels – the Life's Better with a Boat campaign is designed around key messages:

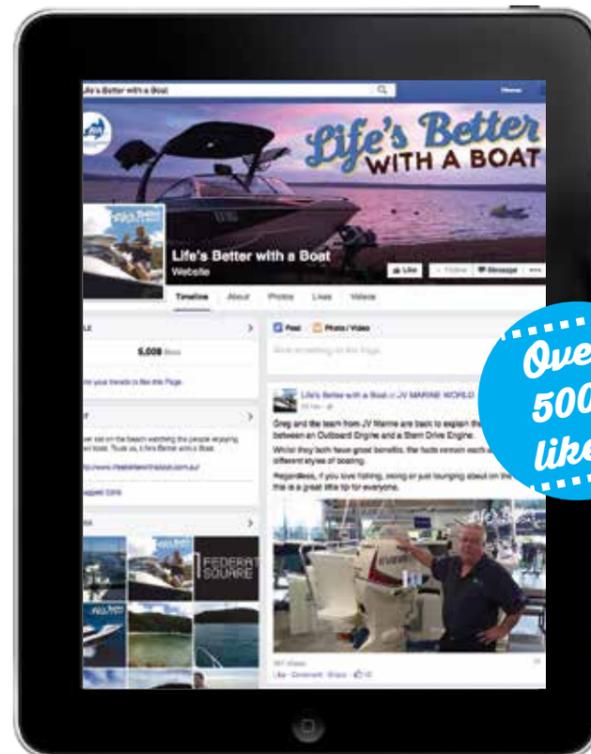
- Operating and maintaining a boat can be simple and fun
- Boating is family friendly and safe
- It's not as expensive as you think
- Things you can do with your boat

The campaign has attracted widespread interest among the public and industry, and given the nature of the media channels, will continue to grow.

“Operating and maintaining a boat can be simple, affordable and fun.”

Life's Better with a Boat campaign

The BIAV is increasing participation with the 'Life's Better with a Boat' campaign.

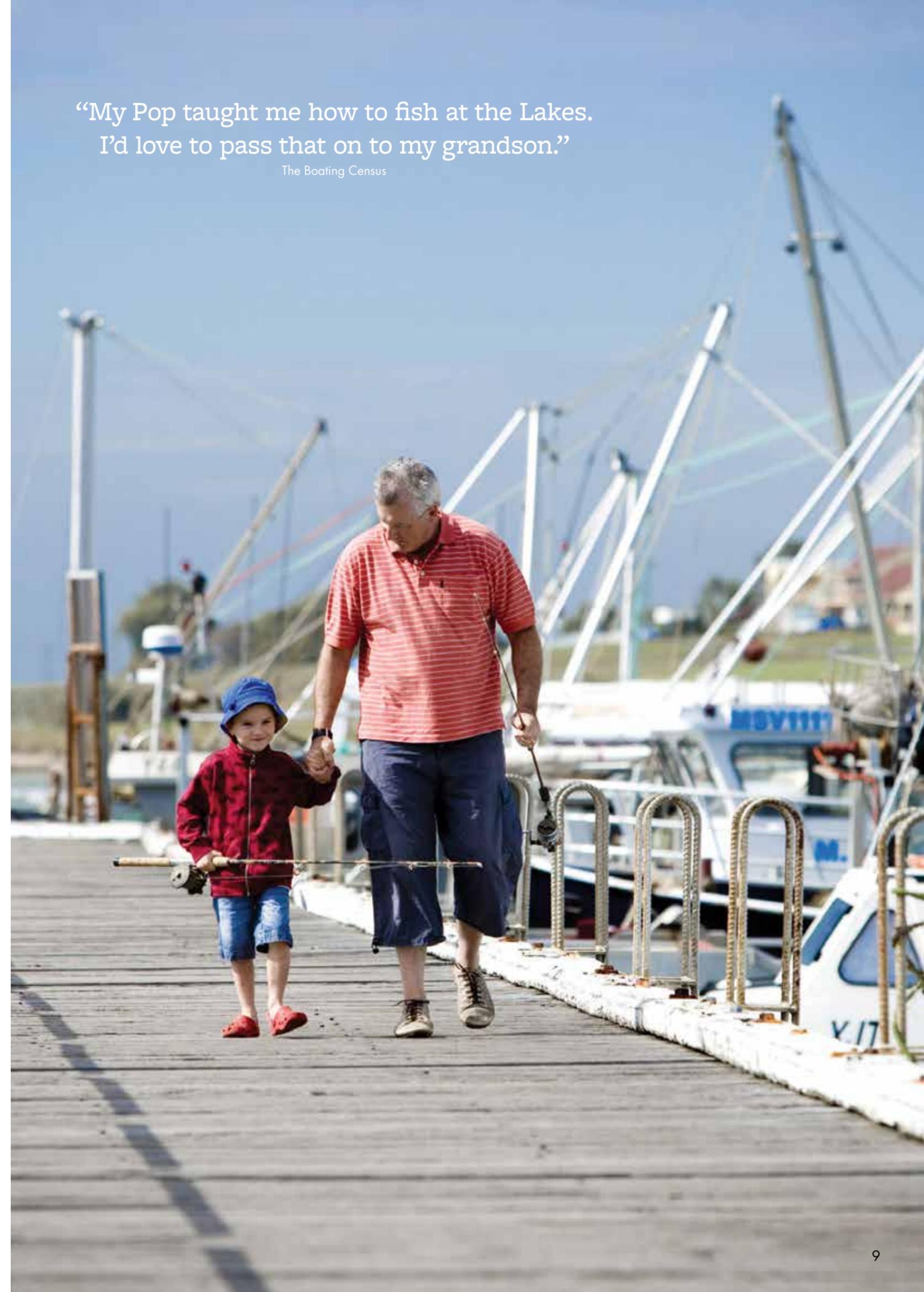


### Implication

Enhance the value of boat ownership by demonstrating the utility of a boat - and educate users on boat handling skills

“My Pop taught me how to fish at the Lakes. I'd love to pass that on to my grandson.”

The Boating Census



# 04

## Strong Manufacturing

Victoria is well represented in Australian boat manufacturing, with prestigious brands including, Bar Crusher Boats, Bass Strait Boats, Caribbean, Edencraft, Evolution, Haines Hunter, Hart Marine, Malibu, Spy Boats, Streaker Boats, Whitley and trailer manufacturers including Easy-Tow, Dunbier and Mackay.

These brands are major contributors to Victoria's \$4.5 billion dollar boating economy. They also represent a large proportion of the state's 17,700 full-time employees.

88% of the boating community say  
"I prefer to buy Australian made"

2014 Boating Census



# 05

## Destination Boating

The destination is a critical part of the boating experience. Roy Morgan research highlights that Victorian boat owners are highly active in the tourism sector.

'86% of Victorian boat owners plan on taking a trip in the next 12 months - and they are 67% more likely to visit theme parks compared to the state average'

Holiday activity of Victorian Boat Owners	%	% State Avg	Index*
Plan on taking a trip in next 12 months	86	75	1.15
Been on long trip last 12 months	76	58	1.31
Experienced outdoor activities last 12 months	51	28	1.82
Say "I like to go away on weekends"	60	48	1.25
Restaurant, food or wine experience last 12 months	26	20	1.30
Visited National Parks or forest last 12 months	22	13	1.69
Went to professional sports event last 3 months	18	14	1.29
Rented a car or truck in last 3 months	10	8	1.34
Went to a theme park in last 3 months	5	3	1.67
Travelled by air in last 12 months	48	40	1.20
Traveller by ferry, jetcat, rivercat last 3 months	7	5	1.54

\*Index = times more likely relative to the state average  
Roy Morgan Research September 2014



### Top 5 Destinations for Victorian Boat Owners\*

1. Mornington Peninsula region
2. Phillip Island region
3. The Lakes region
4. Geelong, Queenscliff, Barwon Heads region
5. Murray, Mildura, Swan Hill region

\*Inclusion based on index rating  
Roy Morgan Research September 2014

Boating holidays are becoming more desirable to boat owners, thanks to cheaper fuel prices, better trailers and larger trailerable boats. Environmental factors have had a positive impact, with in-land water levels rising and pelagic fish stocks increasing. The bluefin tuna run is now a major tourist attraction on the southwest coast of Victoria, with anglers coming far and wide for the chance to land a 100kg fish.

### Implication

Opportunity for growth and transfer of skills from other industry

### Implication

Promoting destinations and partnering with tourism operators will stimulate usage



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