

## **Boat Rental - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

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### **Report description:**

Boat Rental Market Analysis

boat rental market size in 2026 is estimated at USD 19.46 billion, growing from 2025 value of USD 18.41 billion with 2031 projections showing USD 25.64 billion, growing at 5.68% CAGR over 2026-2031. The current growth wave reflects a structural migration from ownership to access-first consumption, reinforced by resilient coastal tourism demand, municipal waterfront upgrades, and wider acceptance of peer-to-peer (P2P) digital booking channels. Operators report brisk utilisation rates in key Mediterranean and Caribbean hubs, while government grant programmes for marina modernisation in the United States and Europe continue to unlock capacity. Demand tailwinds also arise from emission regulation deadlines that spur fleet renewal, with hybrid and full-electric vessels gaining visibility in short-haul charters. Competitive intensity remains high as technology-forward platforms enter new geographies, introducing data-driven pricing and predictive maintenance features that lift asset yields. Meanwhile, insurance providers have begun rolling out purpose-built policies for P2P rentals, a development that lowers entry barriers for individual owners and accelerates supply expansion.

Global Boat Rental Market Trends and Insights

Growth in Coastal and Marine Tourism

Mediterranean operators benefit from harmonised licensing that enables week-long itineraries spanning multiple countries without onerous customs checks. Visitor surveys confirm that programme variety and safety rank above price, suggesting scope for

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premium-tier packages that combine guided excursions with onboard culinary services. In Southeast Asia and the Southern Caribbean, port authority upgrades and destination marketing campaigns are expanding the catchment for first-time renters. The post-pandemic focus on open-air leisure further strengthens the boat rental market as travellers seek crowd-averse alternatives to land-based resorts.

#### Proliferation of Online Peer-to-Peer Rental Platforms

Digital aggregators lower search and transaction costs, allowing individual vessel owners to tap global demand while retaining pricing autonomy. Market studies indicate that online boat rentals grew 3.5 times faster than luxury hotel bookings in recent seasons, aided by robust insurance products that now cover up to USD 300,000 in liability per trip. Real-time availability feeds and algorithmic dynamic pricing raise utilisation to levels once reserved for fleet operators, improving owner economics. Regulatory compliance still varies by jurisdiction, but leading platforms invest heavily in skipper-licence verification and local tax remittance features, turning compliance into a competitive moat. Lower commission structures relative to traditional charter brokers have redirected budget-conscious travellers toward P2P bookings, especially for day-cruise motorboats.

#### Seasonal Demand Volatility

Mediterranean operators earn up to 70% of annual revenue during a 12-week summer window, exposing cash flows to weather shocks and economic uncertainty. Shoulder-season promotions and sport-event tie-ins help but rarely offset peak reliance. Weather-triggered cancellations force platforms to refund bookings, adding liquidity strain. Labour markets mirror the pattern; professional crew migrate to warm-water regions during Europe's winter, leaving gaps that inflate wage bids at season start. Geographic diversification can smooth revenue but entails asset ferrying and regulatory dual-compliance costs that smaller operators struggle to bear.

Other drivers and restraints analyzed in the detailed report include:

Millennial Preference for Access Over Ownership  
AI-Driven Dynamic Pricing Boosts Boat Utilisation  
Stringent Emissions and Noise Regulations

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Motorboats contributed 40.78% of the boat rental market size in 2025, retaining an edge through multi-purpose versatility spanning fishing, watersports, and sightseeing charters. Stable handling characteristics and moderate draft make them suitable for varied coastal terrains, from shallow Florida keys to steep Croatian coves. Catamarans, however, are surging at a 9.08% CAGR through 2031, riding group travel and luxury tourism preferences for spacious decks and minimal roll motion. Operators reposition catamarans into week-long charter packages that fetch higher daily rates and longer booking windows, lifting lifetime yield per hull. Sailing yachts sustain a loyal purist clientele that values wind-powered voyages and lower fuel costs, while rigid-inflatable boats fill niche roles such as dive support or coastal patrols.

Fleet renewal underscores the trend. Le Boat's GBP 100 million order for 400 Delphia cabin cruisers over 10 years signals belief in sustained demand for canal and river cruising experiences. Across the Mediterranean, charter brokers report 80-plus-foot power catamarans booking out a full season ahead, illustrating demand-pull even before new units hit slips. Investors thus view larger multihulls as an accretive asset class within the boat rental market.

Internal-combustion engines still anchored 82.08% of the boat rental market revenue share in 2025, reflecting legacy asset pools

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and unmatched range for multi-day charters. Yet full-electric units clock an 17.62% CAGR as coastal noise and emission caps draw nearer, particularly around Scandinavian fjords and Alpine lakes.

Hybrid drivetrains provide a bridging option for operators needing 100-plus nautical mile reach but wishing to reduce fuel burn. The International Maritime Organization's 20% greenhouse-gas reduction milestone for 2030 sharpens the transition timeline. Battery cost curves continue trending downward, and rapid-charging pontoons are rolling out in premium marinas, reducing range anxiety. As regulatory sticks combine with consumer pull, electric units will likely account for a double-digit slice of the boat rental market share by decade's end.

The Boat Rental Market Report is Segmented by Boat Type (Yacht, Sailing Boat, Catamaran, Motorboat, and RIB), Power Source (IC Engine, Hybrid, and Full-Electric), Activity Type (Fishing, Leisure Sailing / Cruising, and More), Booking Channel (Online Aggregator Platforms and More), Rental Duration (Hourly and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

### Geography Analysis

Europe controlled 38.60% of global revenue in 2025, supported by dense marina networks, cross-border cruising regulations, and a tradition of summer yachting holidays. Mature charter corridors around Croatia, Greece, and the Balearics now offer electric-only zones that entice eco-conscious travellers. The continent also hosts the largest inland-waterway rental base, spanning French canals to German lakes, broadening seasonality beyond coastal peaks. Infrastructure investment continues, supported by EU Blue Growth funding and local waterfront regeneration grants that modernise piers and install shore power for low-emission fleets.

Asia-Pacific is expected to be the fastest-growing region, with an 7.88% CAGR projected through 2031. Rising disposable incomes in China and India and pro-tourism policies in Indonesia and Thailand foster new charter corridors and island-hopping itineraries. Singapore positions itself as a superyacht logistics hub, leveraging deepwater berths and tax incentives to attract charter vessels that later reposition across Southeast Asia's archipelagos. North America expands at 6.05% CAGR, underpinned by a robust recreational boating culture and deep capital markets willing to finance fleet upgrades. The federal Boating Infrastructure Grants continue channelling funds into transient-slip projects that support charter activity. South America posts a 7.12% CAGR on growing inbound tourism and coastal infrastructure improvements, led by Brazil's Atlantic charter routes and Chile's Patagonia expedition market. Middle East and Africa grow more modestly due to regulatory hurdles and marina scarcity, though Dubai's luxury yacht scene and South Africa's Western Cape eco-tourism niche produce steady gains.

### List of Companies Covered in this Report:

Boatsetter Inc. GetMyBoat ClickandBoat Nautal Sailo Inc. SamBoat Zizooboats GmbH Boat Jump Incrediblu Globe Sailor Yachtico Inc. Le Boat Dream Yacht Charter Freedom Boat Club Anchor Rides Adventure Boat Rentals Blue Boat Yacht Entertainment Co.

### Additional Benefits:

- <ul> The market estimate (ME) sheet in Excel format
- 3 months of analyst support </ul>

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