EXECUTIVE SUMMARY

- **The context**: Leisure boating has increased in popularity during the last three decades. A major survey of moorings was last conducted in 1991. Hence an urgent need for an up to date survey was apparent. The British Marine Federation has responded to this need by conducting an audit that focuses on the provision of berths and moorings throughout the United Kingdom.

- **The brief**: To produce from survey results, a reference document that provides a comprehensive regional analysis of mooring provision by numbers, type and ownership across the UK for both coastal and inland waters. The inland results are summarised below. The results of the coastal survey are presented in a separate report.

- **Geographical division of moorings:** There are three major inland Navigation Authorities: British Waterways, the Environment Agency and the Broads Authority. In addition there are numerous other Navigation Authorities with responsibility for smaller sections of our inland waterways. Many of these are also members of the Association of Inland Navigation Authorities (AINA).

  For the purposes of the survey, the Inland waterways were divided into 30 Inland units. Maps are provided in Appendix B, with tables for each unit in Appendices C and D. The maps gives an indication of the scale of the inland waterway network, with boats registered (or licensed) on the network last season (2002/3) recorded by the Environment Agency at around 32,000, British Waterways around 26,000 and Broads Authority around 13,000. Their figures do not include boats registered by other navigation authorities, although overall figures will be available from AINA shortly.

- **Current moorings**: A picture of UK inland marinas and moorings was established from three main sources:
  1. Survey responses to our questionnaires
  2. Assumptions about non-respondents to our questionnaire
  3. Information supplied by British Waterways from their database and relevant information from the Environment Agency, Broads Authority and AINA

- **Survey:** 926 inland mooring providers were identified from a variety of sources and were considered for inclusion in the structured survey. The list of providers included operators within navigation authorities jurisdiction. British Waterways, the Environment Agency and the Broads Authority each provided invaluable information. We would particularly like to acknowledge British Waterways for making their database available as a source of information from which to draw up a list of private commercial operators to contact.

- **Survey responses**: Of the 754 providers to whom survey sheets were sent, 409 were returned, giving a final response figure of 54.2% as a result of direct postal and follow-up telephone calls.

  1. Survey response data
  Of the 409 respondents, 304 'valid' respondents were received, the remaining 105 having no moorings for a variety of reasons e.g. boating clubs without moorings. Analysis of the data from these 304 questionnaires revealed a total of 24,385 moorings.

  2. British Waterways Database
  The database provided by British Waterways contained mooring information about 504 providers. Of these the data for 363 providers was adopted directly into the Audit resulting in 7,689 moorings. 141 providers were excluded from the Audit due to a lack of mooring information.

  3. Accounting for non-respondents
  Assumptions were made to account for the 345 potential moorings providers who did not respond to the survey on this occasion. Recognised 'pro-rating' methods were used, resulting in an estimate of a further 26,683 inland moorings.

  4. Accounting for providers not surveyed
  The original data British Waterways made available was structured into four sections (in each case the number of records is indicated in brackets):

  - Private Commercial providers on BW waters (PrCom/BW = 172 of 587 records)
  - British Waterways provision (BW/BW= 141 of 504 records)
  - 'End of garden/field' providers (660 records)
  - 'Other' providers (39 records)

  Questionnaires were sent to 415 of the private commercial operators on BW waters to supplement the information available as previously described. Assumptions were made about the remaining 172, along with moorings from the 141 BW/BW providers as well as the end of garden and other providers.

  Together, moorings from the providers within the database not surveyed were estimated at 16,039 using methods described in section 3.3.2. Further information is presented in Appendix F.

  Total estimate
  The 32,074 moorings from survey responses & the BW database, 26,683 pro-rated, and 16,039 estimated moorings from providers not surveyed together give a probable total of around 74,796 moorings.

i.e. in the region of 75,000 moorings on the UK Inland waterways in 2003

This figure bears comparison with AINA figures from 1998[1] which indicate 81,798 permanent moorings for powered and un-powered craft suggesting a potential underestimate of the total inland mooring market. Particularly, if short-term moorings this figure is revised to 105,911.

That said figures supplied by BW indicate that between 1996-97 & 2002-03 there has been a shift towards long-term licenses.

- **Mooring demand:** The survey demonstrates a high demand in inland waters of the UK. Two pieces of evidence taken from the survey responses alone, support this assertion:

- The current waiting list for moorings was 2,249, an overwhelming 98% of which were for power.
- The five-year waiting list totalled 3,762 moorings of which again 98% of the forecast demand was for power moorings.

  Current vacant moorings totalled 1,678 of the 24,385 moorings identified from completed questionnaires – an overall rate of 6.9%. Regional variations have a bearing on the figures for supply and demand. It is not known what level of vacancies exist from the total moorings supply. However, anecdotal evidence indicates strongly demand exceeding supply in some areas.
  This anecdotal evidence is reinforced by the data shown when the survey results & BW database are combined. The combined data reveals no vacancies in 2 of the 30 units. Grand Union Canal North recorded the highest vacancy rate at 16.1% of the total UK vacancies.

- **Mooring types**: Pontoon/marina moorings were by far the most popular type and were increasing both in number and in relative terms compared to other mooring types.

  The results reveal that pontoon/marina moorings accounted for 52.4% of the moorings in 2003 (16,801 of the 32,074). The next most important category was online offside accounting for 5,578 moorings or 17.4%.

- **Constraints on mooring provision:** Respondents were asked to complete two sections on constraints to provision of new moorings and expansion. The first section related specifically to applications made for new moorings over the past five years; the second to current or future developments.

[1] Figures from 1998 are the most recent available, these are shortly to be updated

During the past 5 years just under 30% of respondents had submitted applications for new moorings (89 of 304). Of these 58% were successful (only 52 of 304 responses). Both these figures are slightly lower than their coastal equivalents, although the difference may not be statistically significant.

Analysis of the results reveals the following broad constraints to extending moorings provision and associated facilities:

Lack of space
Planning system
Broad environmental issues

Further information is presented in Appendix D.

- **Conclusion:** The key findings from this report are as follows:

  The number of moorings is far greater than that shown in any previous surveys, although absolute comparison is difficult because of variations between surveys. Hence this audit is a baseline on which to build. The headline figure is that there are in the region of 75,000 moorings on the UK Inland waterways in 2003, although this figure may still be an under-estimate.

  There is a strong demand for moorings for current and mid-term (5 year) requirements and in some areas no vacancies were recorded. Current waiting list information indicates that there is overwhelming demand for power moorings.

  Pontoon/marina type moorings are prominent in the Inland sector and not surprisingly online offside moorings.

  Key constraints on moorings include lack of space on land and water, the planning system itself and environmental issues. BMF intend to carry out further analysis of the information gained from the survey to raise awareness of the constraints identified.

  A key aspect to follow up the audit is to work with government to consider how to create the right conditions for supply to keep up with demand, in particular how to improve investment opportunities for moorings providers. The information gained has been invaluable and a vote of thanks is extended to all those who completed questionnaires & provided useful information and feedback.

  A key output from this study is a database containing core information from the survey. Regular updates will be an important part of ensuring a greater understanding of provision of marinas and moorings in the UK, and trends in supply and demand.