British Marine Federation

MARINAS & MOORINGS NATIONAL AUDIT 2003
COASTAL SECTORS – EXECUTIVE SUMMARY

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- **The context**: Leisure boating has increased in popularity during the last three decades. A major UK wide 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 coastal survey results are summarised below. The results of the inland survey are presented in a separate report.

- **Geographical Distribution:** The UK coastline was subdivided into 31 Coastal sectors.

- **Current mooring providers**: 1001 potential coastal mooring providers were identified from a variety of sources and were contacted as part of a structured survey.

- **Survey responses**: Of the 1001 providers who were sent survey sheets, 600 responded, giving a final response figure of 60% as a result of direct postal and follow-up telephone calls.

- **Current moorings**: Provision of current moorings was established from survey responses and pro-rating techniques to account for non-respondents.

  Survey response data
  Of the 600 respondents, 412 'valid' respondents were received; the remaining 188 having no moorings (mostly boating clubs). Analysis of the data from these 412 questionnaires gave a total of 89,164 moorings.

  Accounting for non respondents
  Assumptions were made to account for the 401 potential mooring providers who did not respond to the survey on this occasion. Recognised 'pro-rating' methods were used, resulting in an estimate of a further 59,400 coastal moorings. This figure should be treated with a degree of caution, as it relies on the survey responses being representative of non-respondents.

  Total Estimate
  The 89,164 actual and 59,400 pro-rated moorings together give a probable total of around 148,564 moorings.
  i.e. in the region of 150,000 moorings around the UK Coast in 2003.

- **Mooring demand:** The survey demonstrates that the demand for moorings exceeds the supply in coastal waters of the UK. Three pieces of evidence taken from the survey responses alone, support this assertion:

1. The winter shore storage waiting list was 1,703 moorings
2. The 2003 waiting list for moorings was 10,118 (44% were for sail moorings, 35% for power, 21% unassigned)
3. The five-year waiting list totalled 12,212 (48% of the forecast demand was for sail, 34% for power moorings, 18% unassigned)

No attempt has been made to account for waiting lists or vacancies for non-respondents. However, current vacant moorings totalled 2,470 of the 89,164 moorings identified from completed questionnaires - an overall rate of 2.8%. Regional variations have a bearing on the figures for supply and demand as indicated in Appendices C and D.

From the survey results, no vacancies were recorded in 11 of the 31 coastal sectors. Generally, there were very few vacancies in Southwest and South Central England, between Eastbourne & Greater London, from Boston to Berwick on Tweed and in Northwest and West Wales.

The highest vacancy rate (15.7%) was in Northern Ireland followed by the Portsmouth Harbour to Bognor Regis sector (8.8%).

- **Mooring types**: Pontoon moorings were by far the most abundant 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 41.3% of surveyed moorings in 2003 (36,789 of 89,164 surveyed) whereas in 1991 the calculated percentage was 38.3% (26,429 of 68,916 surveyed).

  Swinging moorings accounted for 28.0% (24,961 of 89,164), with fore and aft moorings 10.4% (9,299 of 89,164). Together these two types accounted for 38.4% of all moorings (34,260 of 89,164) compared with 43.4% in 1991 (29,910 of 68,916). Hence the proportion of these two types of mooring appears to have declined since 1991, although absolute numbers have not.

- **Constraints on mooring provision:** Survey respondents were asked to identify specific constraints on mooring provision through two different questions. No written guidance was given and so responses were entirely spontaneous.

  The majority of respondents provided ‘no response’ in this section of the questionnaire. Of the responses received six general areas were identified:

  1. Lack of space
  2. Planning system
  3. Broad environmental issues
  4. Environmental designations[1]
  5. Dredging
  6. Finance

[1] SSSIs (Sites of Special Scientific Interest), AONBs (Areas of Outstanding Natural Beauty), SACs (Special Areas of Conservation)’ etc

Further information is presented in Appendix D

- **Conclusion:** The key findings from this survey 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.

  Demand for moorings exceeds supply both for current and mid-term (5 year) requirements. There is a shortage of winter shore storage.

  Pontoon/marina type moorings are growing in importance in response to consumer demand. Whilst, the numbers of other types of moorings (e.g. fore and aft and swinging moorings) appear to be increasing, the proportion in relation to pontoon moorings is decreasing.

  Key constraints on moorings include lack of space on land and water, the planning system itself, environmental issues, finance and dredging problems.

  BMF intend to carry out further analysis of the information gained from the survey. This will allow BMF to raise awareness of the constraints identified and work with government to consider developing a strategy for UK marinas and moorings. The information gained has been invaluable and a vote of thanks is extended to all those who completed questionnaires.

  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.