

# **Marina Berth Supply & Demand Trends**

**Updated Report  
April 2018**

## Version Control

Date	Status	Author	Changes
17 April 2015	Report Completed	Matt Comer Strategic Analyst	
4 April 2018	Report Updated	Matt Comer Consultant	Partial update of report to include Westhaven occupancy statistics to February 2018, the current waiting list as at March 2018 and updated commentary on recent marina developments.
4 April 2018	Review Completed	Philip Wardale Special Projects Manager	

# Marina Berth Supply & Demand Trends

## 1. Executive Summary

### 1.1 Introduction

This report provides an overview of the local and international trends for recreational boats and marina berths and the likely future supply and demand for berths in the Auckland Market.<sup>1</sup> This analysis has informed Westhaven Marina's planning and business case for the proposed redevelopment of the Westhaven pile mooring area. The sources of the information include marina data, statistics, research reports and survey results. The original report was completed in April 2015. It has been partially updated in April 2018 with the latest Westhaven occupancy statistics, current Westhaven waiting list and updated commentary on recent marina developments.

### 1.2 Marina Berth Supply

The defined "Auckland Market"<sup>2</sup> that is the focus of this report comprises over 4,800 recreational marina berths which are comparable to Westhaven.<sup>1</sup> Westhaven is the largest marina, with 1,492 marina berths, comprising over 30% of the marina berths in the Auckland Market. This includes Westhaven's 2014 development of a new Pier Y which replaced its remaining 35 swing moorings with 73 new marina berths including modern plinths, pump out facilities and provision of multi-hull berths and fuel docks. Almost all of the marina berths in the Auckland Market are configured for mono-hull vessels, with very little supply of multi-hull marina berths.

There has been very limited supply of new marina berths in the Auckland Market during recent years. This reflects the increasing difficulty in gaining consent for new marina facilities on sensitive coastal land under the Resource Management Act and other legislation. A proposed new marina at Matiatia on Waiheke Island was challenged in the Environment Court and not approved. Subsequently, consent has been granted for a 186 berth floating marina to be constructed in Putiki Bay on Waiheke Island, despite some local opposition. In the wider Auckland region, a 131 berth marina at Sandspit was completed in 2016. The Sandspit and Putiki Bay marinas are both distant from the CBD and relatively small size, so are unlikely to have any material impact on demand at existing marinas in the Auckland Market.

### 1.3 Growth in Vessel Demand

Westhaven is well positioned to continue to attract strong demand in the future, given its central location and full service facilities; the expected long-term growth in the market; and constraints on new marina development.

The Global Financial Crisis (GFC) and increasing imports depressed the local boat manufacturing market, but boat numbers in the Auckland Market are expected to continue to grow over the long term. The proportion of households owning boats has approximately doubled in the past 40 years.<sup>3</sup> New Zealand has one of the highest boat ownership ratios in the world and Auckland's forecast population growth to 2.5 million over the period to 2040 will be a key growth driver (noting that changing population demographics could change the boat ownership ratio<sup>4</sup>).

The key risks to demand are boating affordability and alternative recreational activities. However, on balance, there is likely to be continued strong demand for marina berths in the foreseeable future.

### 1.4 Growth in Vessel Size

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<sup>1</sup> The scope of the "Auckland Market" considered in this report is defined in Section 2.1. It excludes very small marinas, distant marinas (Sandspit), commercial berths, marinas focussed on larger berths above 30m, swing and pile moorings and dry stackers.

<sup>2</sup> There are also over 4,500 pile and swing moorings in the Auckland region which cater for boat owners focussed on low cost (and these typically cater to smaller, older, lower value vessels). This study does not focus on these other moorings.

<sup>3</sup> Auckland Recreational Boating Study prepared for Auckland Council, Beca, April 2012, p34.

<sup>4</sup> Immigration is likely to reduce boating propensity per capita in New Zealand but the ageing population increases the target customers with discretionary funds for recreational boating.

There is a clear trend, both locally and internationally, of increasing vessel sizes. This is evidenced by:

- International and NZ market surveys and interviews confirming demand is strongest in the 12m plus range (see Section 3.2);
- NSW vessel registration forecasts for the next 30 years show fastest growth for 14m to 20m+ berths (see Section 3.1);
- Westhaven's marina berth sizes 13.5m upwards have average occupancy of 98% (which is effectively "full"). Whereas, declining occupancy in Westhaven's less than 10.5m berths has required discounted pricing to fill vacant berths (see Section 3.2.3);
- Westhaven's waiting list has grown significantly over the last 3 years to currently over 200 customers wanting marina berths in the 13.5m to 20m range (see Section 3.2.4);
- A consistent trend of increasing average berth lengths of marina developments in the Auckland Market over time. Recent marina development average berth lengths have been in the 15m to 18m range (see Section 2.3).

### 1.5 Growth in Non-Marina / Land Based Storage

In order to accommodate the growing volume of larger vessels in marinas there is an increasing requirement for alternative storage of smaller vessels up to 10m to 12m in length. These storage alternatives include boat stackers, hard stand and there are over 4,300 low cost non-marina swing and pile moorings in the Auckland region.<sup>5</sup> There is also strong growth in demand for vessels which utilise land based storage given their greater affordability and ease of use. Trailer power boats and personal water craft (jet skis) were growing at 10% p.a. growth prior to the GFC and a high level of growth is expected in the future.<sup>6</sup> In 2011 there were approximately 34,000 registered boat trailers in Auckland.

### 1.6 Growth in Powered Vessels and Multi-hulls

There is an increasing proportion of powered vessels, which require wider berths but shallower draft, however this trend may be tempered by future increases in fuel prices. There is also increasing demand for multi-hull vessel berths which generally require live aboard facilities.

### 1.7 Efficient Water Space Utilisation

The limited supply of new marinas means existing marinas in Auckland need to optimise the utilisation of their facilities to meet growing demand and respond to the local and international trends discussed in this report.

Westhaven is the last remaining major marina in Auckland with a large number of pile moorings. The pile moorings at Westhaven have low occupancy (65% during the last 12 months to February 2018) which has been declining and also has low pricing relative to marina berths. This represents a very inefficient use of Westhaven's water space. The proposed Stage 1 redevelopment of the pile mooring area with modern marina berths will significantly improve the utilisation of this water space and respond to market trends including increasing vessel size and growing use of multi-hulls and live aboard facilities.

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<sup>5</sup> There are approximately 70 Moorings Management Areas in the Auckland region which provide over 4,300 pile and swing moorings. These are lower cost than marina berths given the lack of convenient access and facilities. Swing moorings typically cater to smaller, older, lower value vessels.

<sup>6</sup> Beca, April 2012, p32.

## 2. Supply of Marina Berths, Moorings and Land-Based Storage

### 2.1 Background

The Auckland region's marinas have developed incrementally from the construction of the first of the region's marinas, the St Mary's Bay Boat Harbour in 1926. As an example, this site has increased in intensity of use from accommodating 120 swing moorings in its early days to the current Westhaven Marina which occupies the same footprint but accommodates over 1,800 boats in a combination of marina berths, pile moorings and land based storage. Other marinas in the region have typically developed in sheltered areas previously occupied by swing moorings. Continuing this trend in intensification, dry stacks and trailer boat parks are being increasingly used for storage of vessels up to 8m long and in some cases 10m long.<sup>7</sup>

### 2.2 Current Auckland Supply

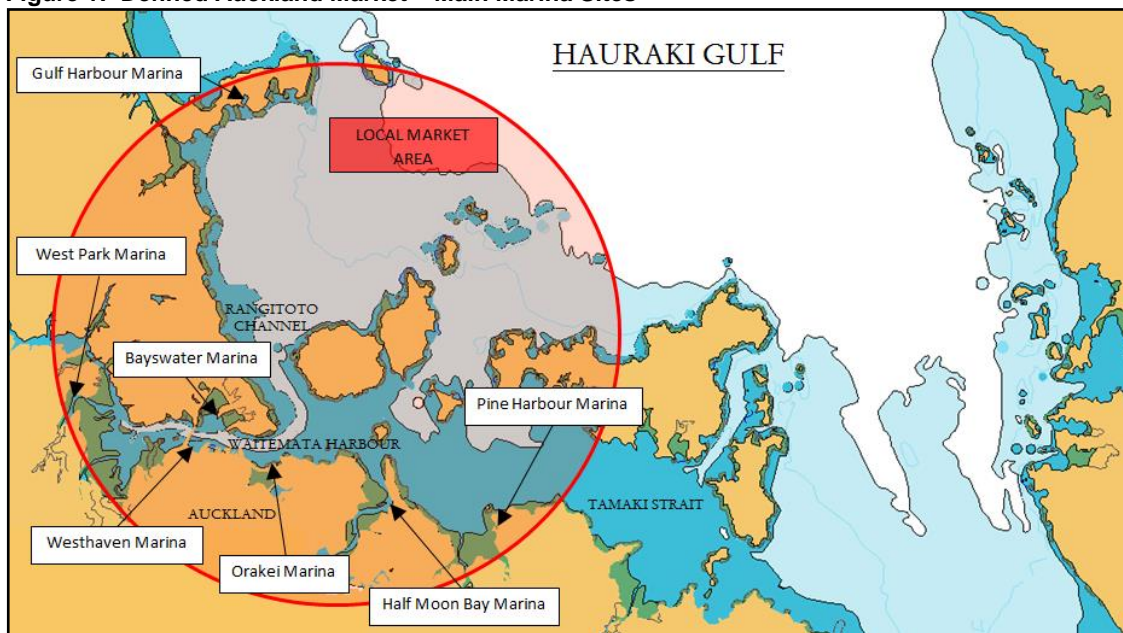
#### 2.2.1 Marina Berths

Around half of New Zealand's marina berths are located in the Auckland region.<sup>8</sup> This report is focussed on a defined Auckland marina market which is comparable to Westhaven which is highlighted in the map below and includes the main marina sites and berths within the south west of the Hauraki Gulf; extending from Gulf Harbour in the north to Pine Harbour in the south ("Auckland Market").

The following facilities are excluded from the scope of the Auckland Market analysis in this report:<sup>9</sup>

- The small marinas at Milford, Bucklands Beach and Outboard Boating Club<sup>10</sup>;
- Westhaven charter boat berths, Silo superyacht marina, Pier 21 marina, Hobson West and Viaduct Harbour marina; and
- The two dry stack facilities adjacent to Westhaven Marina which are operated by Orams and Pier 21 and can together accommodate 510 vessels up to 12m length
- The 131 berth Sandspit marina completed in July 2016 which is outside the main local market area shown in Figure 1.

**Figure 1: Defined Auckland Market – Main Marina Sites**



<sup>7</sup> Beca, April 2012, p34.

<sup>8</sup> Beca, April 2012, p32.

<sup>9</sup> The inclusion of these other facilities would increase the total number of marina berths in Auckland to over 6,000. Source: Beca, April 2012, p16.

<sup>10</sup> Outboard Boating Club excluded since height restrictions from bridge limit boat size.

The Auckland Market is mature and well established, with little development occurring in recent years. The most recent new supply was in 2014 Westhaven added a further 73 berths in the Pier Y development. The Auckland Market supply of marina berths (excluding swing and pile moorings) is shown in the table below.

**Figure 2: Local Auckland Market – Summary Marina Berth Mix**

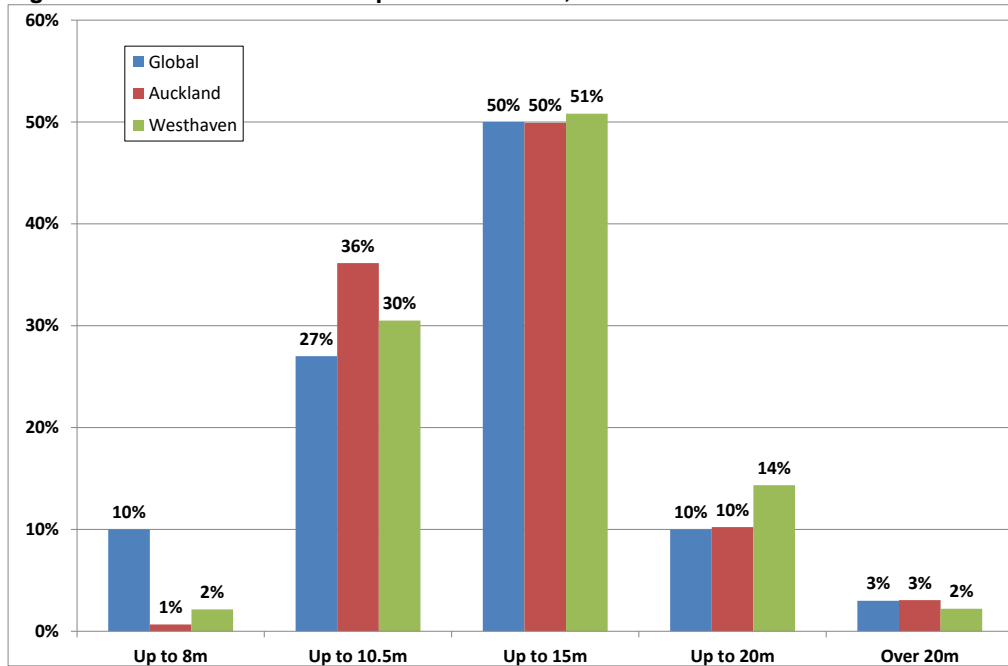
		MARINA							AUCKLAND MARKET		
		West-haven	Half Moon Bay	West Park	Pine Harbour	Gulf Harbour	Bays-water	Orakei	West-haven Pier Y	TOTAL SUPPLY	%
Approx. Yr. Established		1930's	1970's	1985	1987	1990	1996	2006	2014		
Berth Size (m)	8	32	-	-	-	-	-	-	-	32	0.7%
	9	8	113	127	36	-	-	-	-	284	5.9%
	10 – 10.5	447	247	290	183	256	29	-	-	1,452	30.2%
	12	446	107	-	207	377	168	-	-	1,305	27.2%
	13 – 13.5	-	-	133	80	178	68	26	22	485	10.6%
	14 – 14.5	248	36	-	-	-	-	-	19	306	6.3%
	15	-	43	31	-	102	36	48	23	302	5.9%
	16	83	2	11	31	1	44	-	-	172	3.6%
	17 – 18	72	-	-	10	49	20	41	-	192	4.0%
	19	-	-	-	-	-	-	18	-	18	0.4%
	20	50	9	-	5	20	14	2	9	109	2.3%
	21	1	-	-	-	17	-	13	-	31	0.6%
	22	15	-	-	-	5	6	1	-	27	0.6%
	23	-	-	-	-	-	-	2	-	2	0.0%
	24	13	-	-	-	7	-	1	-	21	0.4%
25	-	-	-	1	11	3	-	-	15	0.3%	
25m+	4	3	-	1	10	6	27	-	51	1.1%	
<b>TOTAL</b>		<b>1,419</b>	<b>560</b>	<b>592</b>	<b>554</b>	<b>1,033</b>	<b>394</b>	<b>179</b>	<b>73</b>	<b>4,804</b>	<b>100.0%</b>
<b>Av. Berth</b>		<b>12.7m</b>	<b>11.1m</b>	<b>12.3m</b>	<b>12.0m</b>	<b>13.2m</b>	<b>14.0m</b>	<b>18.7m</b>	<b>15.0m</b>	<b>12.8m</b>	

Source: Marina Projects Limited, data from marinas.

The Auckland Market comprises over 4,800 marina berths, with an average length of 12.8m. Westhaven is the largest marina in this market, comprising over 30% of the marina berths.

The following graph provides a comparison of the global distribution of boats berthed at marinas with the local Auckland Market supply of marina berths and the Westhaven berth mix.

**Figure 3: Marina Berth Mix Comparison – Global, Local Auckland Market & Westhaven**



Source: Westhaven data, data from other Auckland marinas, ICOMIA Global Marina Development presentation, October 2012.

The chart shows that Westhaven and the Auckland Market currently have a broadly similar distribution of marina berths to the global market, but with much fewer small berths up to 8m. In New Zealand small vessels tend to be stored on trailers, swing moorings, hardstand or boat stackers rather than in marinas.

### 2.2.2 Multi-hull Marina Berth Supply

Presently there is little supply of multi-hull berths in New Zealand. Accordingly 15 multihull berths have been recently created at Marsden Cove Marina (by removing the centre pile from mono-hull berths) and 18 multi-hull berths were included in the Westhaven Pier Y development.

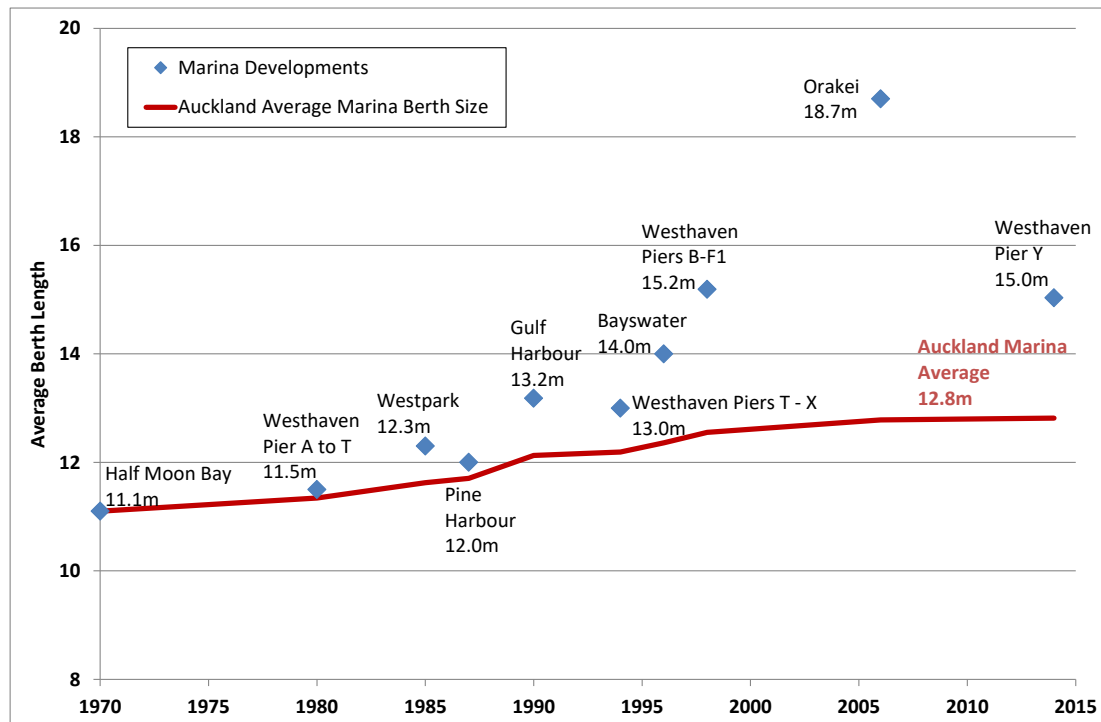
## 2.3 Marina Developments

### 2.3.1 Increasing Berth Size

There has been a clear increasing trend in the size of berths in marina developments in New Zealand.

As shown in the chart below, the average size of the floating marina berths in the Auckland Market has increased by 1.7m over the last 45 years from 11.1m to 12.8m. The most recent marina developments have been significantly greater than this average.

**Figure 4: Average Berth Size of Marina Developments in Auckland Market**



Source: Westhaven Marina, Marina Projects Limited, data supplied by other marinas.

Other marina developments outside the defined Auckland Market in recent years include:

- Marsden Cove: completed in 2006, with an average berth length of 15.2m;
- Whangamata: completed in 2008, with an average berth length of 13.1m;
- Sandspit: completed in 2016, with berth sizes ranging from 12m to 18m.



### 2.3.2 New Marina Development

The last new marina that was developed in the local Auckland Market was the 179 berth Orakei marina in 2006. In the wider Auckland region, the only new marina constructed during the last decade is a 131 berth marina at Sandspit completed in July 2016.

Respondents to the Auckland Marine Industry Survey<sup>11</sup> noted that it is becoming increasingly difficult to gain consent for new marina facilities with competing demand for water space and high costs and uncertainty associated with consent processes.

This was demonstrated by the proposed new marina Matiatia on Waiheke Island being challenged in the Environment Court and not approved, resulting in Waiheke Marinas Limited going into involuntary liquidation shortly afterwards.

Subsequently, consent has been granted for a 186 berth floating marina to be constructed in Putiki Bay on Waiheke Island, despite some local opposition.

The Sandspit and Putiki Bay marinas are both distant from the Auckland CBD and relatively small size, so are unlikely to have any material impact on demand at existing marinas in the Auckland Market. There is also potential for extension of the Orakei marina but this is unlikely to proceed in the near term and is subject to consenting.

Given the difficulty in building new marinas on sensitive coastal land under the Resource Management Act and other legislation, existing marinas will need to expand to meet demand.

## 3. Marina Berth Demand Analysis

### 3.1 Growth in Vessel Numbers

International and local data confirms that there is a clear long-term trend of increasing vessel numbers driven by population growth:

- The value of global recreational boat market sales was US\$18.2 billion in 2009 and was expected to grow to US\$27.8 billion in 2015, representing a compound annual growth rate of 8.9%;<sup>12</sup>
- Ownership of recreational vessels in NSW has grown significantly over the last 30 years, with the fastest growth during recent years being for 14m+ boats, as shown in Table 1 below. The NSW Boat Ownership and Storage Report noted that vessel ownership has grown with population increases and forecast that growth in vessel numbers will remain strong. This will create demand for on-water storage infrastructure such as marinas as well as upgraded and expanded recreational boating facilities and boat ramps.

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<sup>11</sup> Waterfront Auckland: Survey of the Auckland Marine Industry, Paul Rowe, March 2012.

<sup>12</sup> Global Recreational Boating Industry Analysis and Forecast 2010-2015, Lucintel.

**Table 1: NSW Recreational Vessel Registrations (Boat Size Changes 1983 - 2015)**

VESSEL SIZES (M)	NSW 1983	NSW 2003	Annual Growth 1983 - 2003	NSW 2009	Annual Growth 2003 - 2009	NSW Jan-15	Annual Growth 2009 - 2015
0 - 3.99	25,636	65,688	4.8%	67,446	0.4%	70,243	0.8%
4 - 5.99	63,760	100,863	2.3%	121,546	3.2%	122,310	0.1%
6 - 7.99	3,321	13,006	7.1%	18,829	6.4%	21,791	2.9%
8 - 9.99	663	5,476	11.1%	6,497	2.9%	6,431	-0.2%
10 - 11.99	365	3,657	12.2%	4,476	3.4%	4,652	0.8%
12 - 13.99	137	1,528	12.8%	2,114	5.6%	2,429	2.8%
14 - 15.99	62	550	11.5%	910	8.8%	1,156	4.8%
16 - 17.99	29	185	9.7%	310	9.0%	458	8.0%
18 - 19.99	14	83	9.3%	150	10.4%	240	9.7%
20M & >	5	53	12.5%	105	12.1%	186	11.9%
<b>TOTAL</b>	<b>93,992</b>	<b>191,089</b>	<b>3.6%</b>	<b>222,383</b>	<b>2.6%</b>	<b>229,896</b>	<b>0.7%</b>
<b>12m upwards</b>	<b>247</b>	<b>2,399</b>	<b>12.0%</b>	<b>3,589</b>	<b>6.9%</b>	<b>4,469</b>	<b>4.4%</b>

Source: NSW Boat Ownership and Storage Report, 2010; NSW Transport and Maritime Statistics 31 January 2015

The GFC and increasing vessel imports significantly reduced demand for New Zealand built vessels, with the exception of trailer boats. However, NZ Marine expects continued growth of boat numbers in New Zealand, as shown in the table below. Note that yachts and launches is the relevant category for marina berths. Beca estimates there are around 11,000 yachts and launches in Auckland and projected that this will grow by 1,600 vessels by the year 2041.<sup>13</sup>

**Table 2: Estimated growth of boat numbers in New Zealand per annum**

Boat Type	Existing Fleet	Annual Growth	Annual Growth %
Trailer power boats	186,170	5,000	2.7%
Yachts and launches	22,313	100	0.4%
Commercial boats	5,495	150	2.7%
Personal water craft (jet skis)	3,114	1,000	32.1%
Trailer sailor boats	15,333	100	0.7%
Dinghies, canoes, Lasers, Windsurfers etc.	282,430	15,000	5.3%
Less: Boats scrapped/exported	n/a	(6,000)	n/a
<b>Total</b>	<b>514,855</b>	<b>15,350</b>	<b>3.0%</b>

Source: NZ Marine Industry Association, October 2014

The forecast growth in Auckland's population from 1.5 million to 2.5 million in 2041, representing growth of 1.7% p.a.<sup>14</sup>, is likely to underpin long-term demand for vessel ownership in the region.

New Zealand has a boat ownership ratio of approximately one boat per eight people – amongst the highest ratio of boat ownership in the world. By way of comparison the ratio is one boat per 18 people in the United States, 40 in Holland, 130 in England, 185 in Germany and 450 in Japan.<sup>15</sup>

The proportion of households owning boats has approximately doubled in the past 40 years with an estimated 15% to 19% of the country's households owning a boat and an estimated 25% (1 in 4) of Auckland's households owning a boat of some type.<sup>16</sup>

<sup>13</sup> Beca, April 2012, p32.

<sup>14</sup> Statistics New Zealand models three scenarios for the future of Auckland's population – high, medium and low growth. Given Auckland's history of rapid population growth, Auckland Council believes it is prudent to base its future planning on the high-growth scenario of growth to 2.5 million in 2041,

<sup>15</sup> Pleasure Boat International Resource Guide: A Reference for U.S. Exporters, 2014 Edition, US Department of Commerce, p70.

<sup>16</sup> Beca, April 2014, p34.

The relationship between population growth and ownership of vessels requiring marina berths is unlikely to be proportional given that the makeup of Auckland's population demographics is changing as a result of immigration (lower propensity for boat ownership) and ageing population (higher propensity for boat ownership).

High growth in the numbers of personal water craft (jet skis) and other small vessels such as kayaks is also expected to continue in the future.<sup>17</sup> However these do not require marina berths so are beyond the scope of this report.

### 3.2 Growth in Vessel Size

International and local data confirms that there is a trend of increasing vessel length.

#### 3.2.1 International Surveys

Waterfront Auckland conducted surveys with representatives from the following international marine industry companies:

- Ian McAndrew, CEO, Australian Marina Management Pty Ltd, Treasurer, Marina Industries Association of Australia (MIAA)
- Andy Goss, General manager, Walcon Marine Australia, Pty Ltd
- J. Everett Babbitt, President, Bellingham Marine International
- John Spragg, General manager, Bellingham Marine Australia
- Andy Stephens, CEO, Vetus-Maxwell, Australia
- Barry Jenkins, Chairman, Superyacht Australia
- Merritt Alves, Association of Marina Industries (USA)

The consensus amongst respondents was that there is a trend to larger vessels, wider beams and more multi-hull vessels. Marinas will need to increase availability of dry-stacking for vessels under 10 – 12m to enable reconfiguring existing marinas for larger vessels.

Bellingham noted the following trends in berth size from the US and Australian markets:

- 1960's and 1970's vessels typically ranged from 20' to 40' (6 – 12m)
- 1980's increased to 25' to 50' (8 – 15m)
- 1990's increased to 30' to 55' (9 – 17m)
- 2000's increased to 40' to 60' (12 – 18m)
- 2010 increased to 40' to 70' (12 – 21m)

Bellingham also noted that larger berths typically offer higher returns on investment and provide greater resistance to economic downturns.

Other US manufacturers also confirmed that production was focussed on vessels mainly in the 12m – 19m range, with sailing vessels typically 12m and launches 16m. US survey respondents also confirmed an increase in multi-hull vessels.

The distribution of lengths of boats in marinas globally is summarised in the table below.

**Table 3: Global Statistics – Average Boat Size in Marinas**

Length	%
Up to 8m	10%
Up to 10m	27%
Up to 15m	50%
Up to 20m	10%
Over 20m	3%

Source: IMG / ICOMIA Global Marina Development presentation, October 2012

<sup>17</sup> Beca, April 2014, p32.

### 3.2.2 NZ Surveys

#### Marine Industry Survey Results

Surveys of individuals working in the maritime industry were conducted for Waterfront Auckland to assist in its future planning for Westhaven.<sup>18</sup>

By far the most common trend noted by respondents was a tendency to new boats getting larger and many respondents noted that this is already noticeable in the marina. Looking forward, respondents expected this trend to continue. In the past 12m was considered to be a large boat, it is now considered to be average. Ken Davern, owner of Marina Berths Ltd, a company that acts as an agent for people selling their berth occupancy licences across New Zealand, noted a drop-off in demand for smaller berths and an increase in popularity of berths of 16m to 18m.

Three reasons were generally put forward for the trend to bigger boats:

- Increased power output & efficiency of modern engines, which compensates for the increased size;
- Materials technology and efficient production techniques are bringing manufacturing costs down (this is particularly noticeable in the influx of new imported vessels); and
- New boat buyers want the biggest and the best, in order to make an impact on the water and in the marina. Those with money are prepared to spend it in order to maximise the comfort and convenience of their boating experience.

However, Leigh Hopper (the developer of the Marsden Cove and Whitianga marinas) noted that there is uncertainty and therefore risk around boating affordability that boat owners (existing and future) will consider. These range from fuel pricing, licencing and occupation charges for the coastal marine area and difficulty and increasing costs of consenting marina developments.

#### Westhaven Marina Users Survey<sup>19</sup>

The results of this survey conducted by Waterfront Auckland in conjunction with the Westhaven Marina Users Association are consistent with the international trend towards increasing vessel size.

#### NZ Marina Operators Association Survey<sup>20</sup>

This survey confirmed that the average berth length at most marinas is around 12m currently. The berth lengths which NZ marina operators noted had strongest demand for rentals were 12m and 15m.

### 3.2.3 Westhaven Occupancy

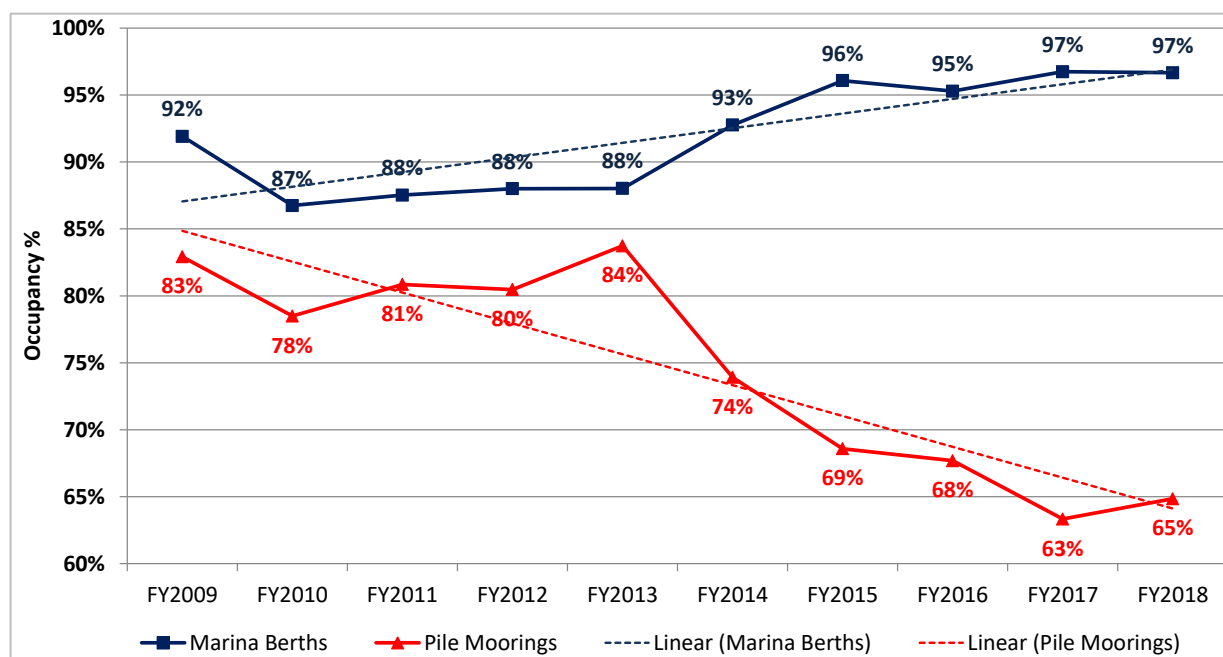
Westhaven Marina currently has effectively full occupancy in its marina berths but relatively low and declining occupancy in its pile moorings, as shown below.

#### **Figure 5: Westhaven Marina Occupancy**

<sup>18</sup> Waterfront Auckland: Survey of the Auckland Marine Industry, Paul Rowe, March 2012. Westhaven Marine Industry survey: Research results prepared for Waterfront Auckland, Ben Parsons & Associates, 17 February 2012.

<sup>19</sup> Westhaven Marina Users Survey, 2012.

<sup>20</sup> NZ Marina Operators Association, Summary of Responses, Members' Survey, 2012.



Source: Westhaven data. "Marina Berths" includes mono-hulls vessels only.

Westhaven's multi-hull berths had average occupancy of 96% during the last 12 month period to February 2018.

The following table shows the occupancy for Westhaven marina berths (excluding pile and swing moorings, multi-hulls and charter berths) since the start of the 2009 financial year. This shows the general recovery in occupancy following the GFC. It also shows the decline in occupancy in the smallest berths up to 10m during the period from 2011 to 2013 which required discounted pricing to improve occupancy in 2014. The 73 new Pier Y berths constructed at Westhaven in 2014 received strong demand and this area has achieved effectively full occupancy.

The strong occupancy in berths lengths 12m upwards is consistent with the international trend of growing vessel sizes discussed above and also the Westhaven waiting list (refer to Section 3.2.4 below).

**Table 4: Westhaven Marina Berth Occupancy by Berth Size**

Berth Size	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018YTD <sup>1</sup>
Up to 9m	94%	90%	95%	89%	83%	92%	87%	84%	94%	80%
Up to 10m	90%	79%	82%	81%	80%	88%	94%	96%	96%	96%
Up to 12m	92%	91%	93%	93%	92%	95%	98%	97%	98%	98%
Up to 14m	96%	94%	88%	92%	95%	98%	98%	98%	98%	98%
Up to 16m	95%	91%	93%	95%	95%	98%	88%	83%	96%	98%
Up to 18m	89%	83%	89%	93%	94%	98%	96%	99%	97%	99%
Up to 20m	92%	90%	76%	89%	97%	99%	100%	93%	86%	98%
Over 20m	89%	88%	82%	75%	85%	96%	100%	93%	96%	92%
<b>Total</b>	<b>92%</b>	<b>87%</b>	<b>88%</b>	<b>88%</b>	<b>88%</b>	<b>93%</b>	<b>96%</b>	<b>95%</b>	<b>97%</b>	<b>97%</b>

Source: Westhaven data, financial year ending June. Excludes pile moorings, swing moorings, multi-hulls and charter berths.

1. The 2018YTD column includes financial year to date data for the 8 months to February 2018.

### 3.2.4 Westhaven Waiting List

Westhaven's waiting list as at March 2018 includes customers wanting 237 marina berths sized from 12 metres upwards. The waitlist has grown significantly (approximately doubled) during the last 3 years. This shows high levels of unsatisfied demand amongst the relevant audience for the proposed pile mooring development.

**Table 5: Westhaven Waiting List for Marina Berth Sizes Over 12 Metres**

Berth Length	Mono-hull	Multi-hull
12m		9
13.5m	43	3
14m	42	4
14.5m	3	5
15m	12	1
16m	45	1
18m	40	1
20m	21	1
22m+	5	
<b>Total</b>	<b>211</b>	<b>16</b>

Source: Westhaven waiting list as at March 2018.

Excludes any duplicates and requests for berth swaps within the marina.

### 3.2.5 Land Based Storage

Modern vessels at the small end of the market will become increasingly able to be stored at home on trailers, or in dry-stack facilities close to the marina.

The effect of this is likely to result in more demand for small boat dry stacking or hardstand facilities around Auckland's launching locations. Currently there are two dry stackers in central Auckland and there are approximately 169 boat ramps in the region.

Storage and launching facilities will become increasingly higher priorities for the marina sector. Onshore storage could lead to a reduction in demand for marina berths where these vessels can be accommodated more economically onshore. However, storage issues are exacerbated by smaller urban residential sites coupled with a larger urban population.

Larger berths assist in reducing the landside demands for car parking requirements.

## 3.3 Sail vs Powered Vessels

There has been a local and international trend of much higher growth in powered vessels, reflecting the time constraints of the modern boating customer, which will shift the berth mix towards powered vessels. NSW vessel statistics clearly show the faster growth in power vessels (70% increase over 10 years) relative to sail vessels (10% increase). However, in the longer term this current trend may be tempered by the increases in the cost of fuel.

NZ Marine estimates that 60% of moored boats (approximately 13,000) are yachts and 40% are power boats (9,000). The Westhaven Marina Users Survey<sup>21</sup> results showed the intentions of several owners to change from a yacht to a powered vessel.

Although not part of the target market for marina berths, there is a trend to larger trailer boats that will have an impact upon marina design. Trailerable power boat production in New Zealand was experiencing 10% year on year growth prior to the GFC. In 2009 NZ Marine's growth forecast for this sector was halved but the sector is still predicted to more than double output by 2020.

<sup>21</sup> Westhaven Marina Users Survey, 2012.

### 3.4 Multi-Hulls

There has been a trend both locally and internationally towards growing use of multi-hull vessels. For example, in Australia as at 2010, there were 162 marina multi-hull berths, representing 5.8% of the total marina berths.

A large number of respondents to the Auckland Marine Industry Survey<sup>22</sup> expected that multi-hulls will be more popular in future. This is an international trend that New Zealand is catching onto, although at this stage multi-hulls are not as popular as they are becoming overseas. A number of reasons for the increase in multi-hulls were put forward. They tend to be more stable and easier to control on the water, making them more attractive to new boat owners, and they tend to have larger living areas, allowing more room for modern conveniences, reflecting the lifestyle aspirations of newcomers to boating. They also offer better fuel economy, especially important as the price of fuel rises. As with the increasing size of boats in general, new materials and production techniques are making multi-hulls more attractive propositions. The factors that led to the global increase in catamaran popularity are present here in New Zealand, and the switch to catamarans by the Americas Cup fleet will only influence that trend further. Survey respondents noted that there are also disadvantages to multi-hull berths:

- Multi-hulls occupy a significant water area inevitably resulting in higher mooring costs but multi-hull owners are reluctant to pay an equivalent square meter rate to mono-hull berths;
- Many multi-hull owners are transient offshore cruisers and therefore multi-hull revenues are more seasonal (lower annual occupancy) and require live aboard capability including close access to ablutions.

## 4. Conclusion

The Auckland Market is expected to continue to experience strong demand for marina berths consistent with international trends but limited supply due to the increasing difficulty in gaining consent for new marina facilities on sensitive coastal land under the Resource Management Act and other legislation. The limited supply of new marina berths means that existing marinas in Auckland need to optimise the utilisation of their facilities to meet growing demand and respond to the local and international trends discussed in this report including increasing vessel lengths; growth in multi-hull vessels and live aboard facilities; more powered vessels; and alternative land-based storage options for smaller vessels.

Westhaven is the largest marina in Auckland and, given its central location and full service facilities, it is likely to continue to attract strong demand for marina berths in the future driven by the expected long-term growth in the market. Westhaven is the last remaining major marina in Auckland with a large number of pile moorings. The pile mooring area of Westhaven marina has become increasingly under-utilised as evidenced by its low and declining occupancy rates. By comparison, there is excess demand for modern marina berths, evidenced by Westhaven's effectively full occupancy and a growing waiting list. The proposed Stage 1 redevelopment of the pile mooring area will respond to this current need and the trends identified in this report to significantly improve and future proof the utilisation of this area.

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<sup>22</sup> Waterfront Auckland: Survey of the Auckland Marine Industry, Paul Rowe, March 2012.