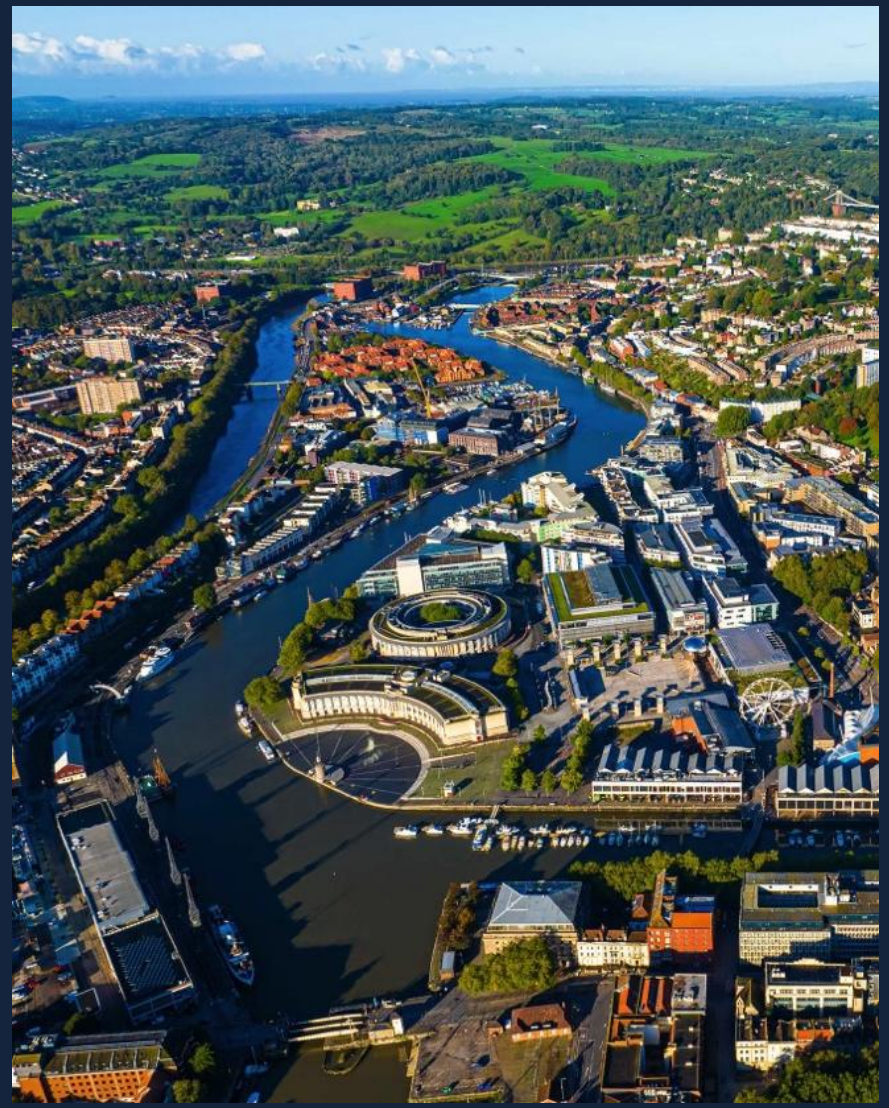


MARINA PROJECTS

# Bristol Floating Harbour

## Mooring Demand Study: Market Study

SETTING THE WORLD STANDARD IN MARINA DESIGN



Prepared For: Bristol Harbour Authority

Document Reference: MP418-R-01

21st November 2025

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# Section 1 – Introduction

# Introduction

Bristol Harbour Authority (BHA) has appointed Marina Projects to assess the mooring offer within Bristol Floating Harbour (Bristol Harbour). The study will analyse existing demand and identify opportunities for growth in key market sectors to guide future operational and investment planning.

To provide a broader perspective, the study will review the regional market which has a direct influence on Bristol Harbour. This will provide context for current level of demand (occupancy), available facilities, and pricing.

A separate assessment will compare Bristol Harbour with similar UK city centre harbours. This exercise will help shape recommendations for tariffs, licence durations, and facilities, ensuring Bristol Harbour remains competitive within the national marine leisure market.

A summary of the core outputs of the market study is:

- Establish demand for different mooring types (liveaboard, leisure, commercial, etc).
- Review of tariffs and pricing structures (to include licence durations) to optimise revenue aligned to market conditions.
- Identify existing Harbour facilities and services to inform proposals for new or upgraded berthing facilities.

These outputs will subsequently inform the other key deliverables for the wider Mooring Demand Study and can be summarised as follows:

- Develop a Harbour rezoning plan that responds to landside uses and explores opportunities for expanding underused areas of the Harbour.
- A financial overview with reference to the various recommendations. The overview will highlight potential income uplift, associated impacts on operating costs, and capital expenditure requirements.





# Harbour Context

Bristol Floating Harbour has a rich maritime heritage, historically serving the shipping trade and industrial activity. To manage the River Avon's significant tidal range, the Floating Harbour was designed with a system of locks to retain water at all states of the tide. The Harbour's history, innovative engineering, and city centre location combine to make it a unique urban waterfront asset.

Over time, the Harbour and surrounding landside have evolved towards leisure, commercial and residential use, becoming a tourist destination in its own right. The Harbour accommodates a wide range of vessel types including liveaboards, leisure vessels, ferry services and watersports activities (rowing, stand up paddleboards etc.). A limited number of permanent commercial and heritage vessels also berth and operate within the Harbour.

Despite its popularity and high activity levels, the Harbour faces significant financial challenges and currently operates at a deficit. The Bristol Harbour Strategy 2026 – 2031 sets out a clear vision to address these challenges, with a primary goal of achieving financial self-sufficiency through a sustainable operating model. Other strategic priorities include:

- Improving infrastructure and improving operational efficiency
- Positioning Bristol Harbour as a leading marine leisure destination
- Enhancing resilience and long-term viability

The Mooring Demand Study is the first step to delivering that vision. It provides the evidence base for future investment and operational planning that will lay the foundation for phased improvements to secure the Harbours future, both financially and as a city asset.

# Section 2 - Site Visit Observations

# Site Visit Overview

A site visit of Bristol Harbour was conducted with members of the BHA team on 7th October 2025. The primary purpose was to view the Harbour from the water, covering the full study boundary from Cumberland Basin to Netham Lock, and to gain a clear understanding of the existing mooring arrangements and operational environment.

Key elements of the site visit included:

- **On-water Assessment:** visiting mooring locations, identifying vessel types and observing infrastructure condition across the Harbour.
- **Landside Visits:** visited different landside assets to understand the relationship between each mooring zone.
- **Operational Discussions:** Engaged in discussion with BHA staff to understand how the Harbour operates, identify any operational challenges and identify where the staff feel future development opportunities lie.

A complete record of Marina Projects observations is provided in Appendix A, with key points provided on the following pages.





# Key Observations

### Tariffs

There are currently **4 tariffs in operation** for leisure and liveaboard moorings (liveaboard, pontoon, non pontoon and winter berth). All of which offer a singular linear price per metre rate.

The tariffs are positioned below typical rates of modern leisure facilities with a **narrow range of tariff types** which does not reflect the locations and facilities that are currently available.

There is **opportunity to introduce a broader and fairer range of tariffs** that better reflects mooring location, access, security and facilities.

Conversely, the commercial fees and harbour dues currently applied are overly complex and often disproportionate to the level of activity. This pricing structure can be prohibitive for many operators, leading to missed opportunities for revenue and engagement.

### Facilities

**Facilities are generally limited and are of a mid to low quality** with only 4 facilities blocks throughout the Harbour.

There is **opportunity to improve and introduce a greater range of facilities in strategic locations** which has the potential to be combined with changes to tariffs.

### Lock Operations

Lock operations have **experienced failures this year, resulting in less visitor traffic**.

There is **capital replacement works underway** for key component parts with a view to overcome these challenges.

### Vessel Demand

There are **22 vessels on the waiting list, 17 of which are narrowboats, widebeam vessels & barges**.

**12 vessels hold a liveaboard licence**. It is understood there are other vessels within the Harbour used for residential purposes without this licence.

Harbour staff recognise there is **opportunity to expand liveaboard mooring** arrangements and liveaboard licences in response to the housing shortage in Bristol.

# Key Observations

### Commercial Vessels

- There are **10 vessels which hold a commercial licence**.
- Of these, 8 pay an annual fee on a long-term licence. A range of fees are currently in place with some being very low.
- **Two vessels' commercial contracts include an element of revenue/profit sharing**. This arrangement has had **positive feedback from operators** as well as contributing to **Harbour revenue generation**.
- It is acknowledged by the Harbour team of the preference to transition all commercial vessels on to percentage of turnover agreements in combination with lower fixed berthing fees.
- There is **aspiration to introduce a greater range of commercial enterprises on to the water** i.e. floating exercise and wellness spaces, cinema, offices, etc. This has **linkages with opportunities identified in the Commercial Prospectus and Place Shaping Strategy.**

### Rezoning

- The modern Harbour has evolved organically over a number of decades resulting in **a mix of mooring types and vessels that does not necessarily align with landside uses.**
- The Place Shaping Strategy identified a diverse range of on water and land interventions to achieve the 20-year vision outlined in the document. In conjunction with these proposals, there is **scope to reorganise the Harbour ensuring different mooring areas and vessel activity respond to landside uses.**

### Parking & Accessibility

- It is acknowledged by Harbour staff that **parking and accessing moorings is a challenge for mooring holders** with limited drop off availability.
- The Harbour is open to introducing a Traffic Regulation Order (TRO) to help address the issue.



# Section 3 - Market Study

# Market Definition

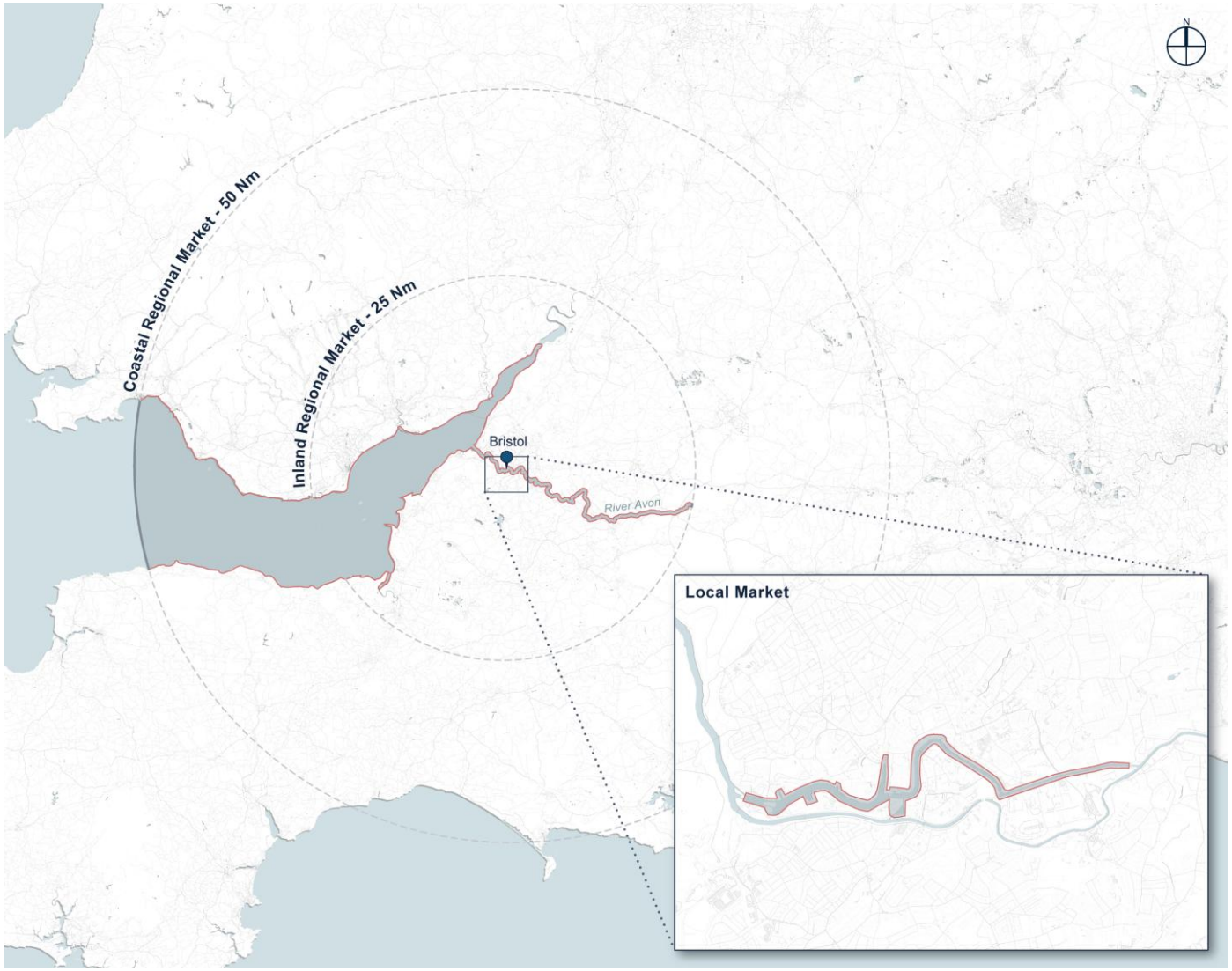
For the purposes of the report, the established market areas are as follows:

- **Local Market:** Bristol Harbour (Cumberland Basin to Netham Lock)
- **Regional Market:** Bristol Channel (50Nm coastal market and 25Nm inland market.)

Following discussions with the Client, and with reference to the Bristol Harbour Place Shaping Strategy and Bristol Harbour Strategy documents, it has been agreed the extent of the local market encompasses the area from Cumberland Basin to Netham Lock including the Feeder Canal. This eastern area of the Harbour is recognised as a key zone of redevelopment within the city centre and presents an opportunity to expand the mooring offer within Bristol.

To define an appropriate regional market study area for Bristol Harbour, and acknowledging the Harbour can be accessed from the Bristol Channel and the Kennet and Avon Canal the following boundaries have been established:

- **Bristol Channel (Coastal):** 50 nautical miles^ (Nm) radius from Cumberland Basin and is based on a typical one-day cruising range for vessels* and informed by local boating trends.
- **Kennet and Avon Canal (Inland):** 25Nm radius from Netham Lock, reflecting practical cruising distances for inland vessels, particularly narrowboats that cruise at slower speeds.




*^Although located within the 50Nm radius, the inland waters of the River Severn east of Sharpness are excluded from the assessment due to the extended transit times required to access Bristol Harbour.*

**Sailing vessels do arrive from the outermost limit of the boundary (e.g., Swansea). However, these vessels typically require a stop enroute to or from Bristol due to shorter cruising ranges and the impact of tidal flows in the Bristol Channel.*

# Report Structure

Bristol Harbour accommodates a diverse range of uses, combining leisure boating with liveaboard, commercial and heritage vessels and water transport operations.

By contrast, the regional market, both coastal and inland, reflects a more typical recreational boating environment, albeit inland waterways do support a proportion of liveaboard activity.

The regional market serves as a useful illustration of modern leisure marinas, offering insights into boating activity, berthholder facilities and tariffs structures that highlight pricing comparables and competitive positioning. However, due to the differing characteristics between the local and regional markets, particularly with respect to differing tidal conditions, types of boating activity and user groups it is not appropriate to make direct comparisons between the two.

To ensure clarity, this report presents the local and regional market assessments as separate subsections, allowing each market to be considered on its own terms.



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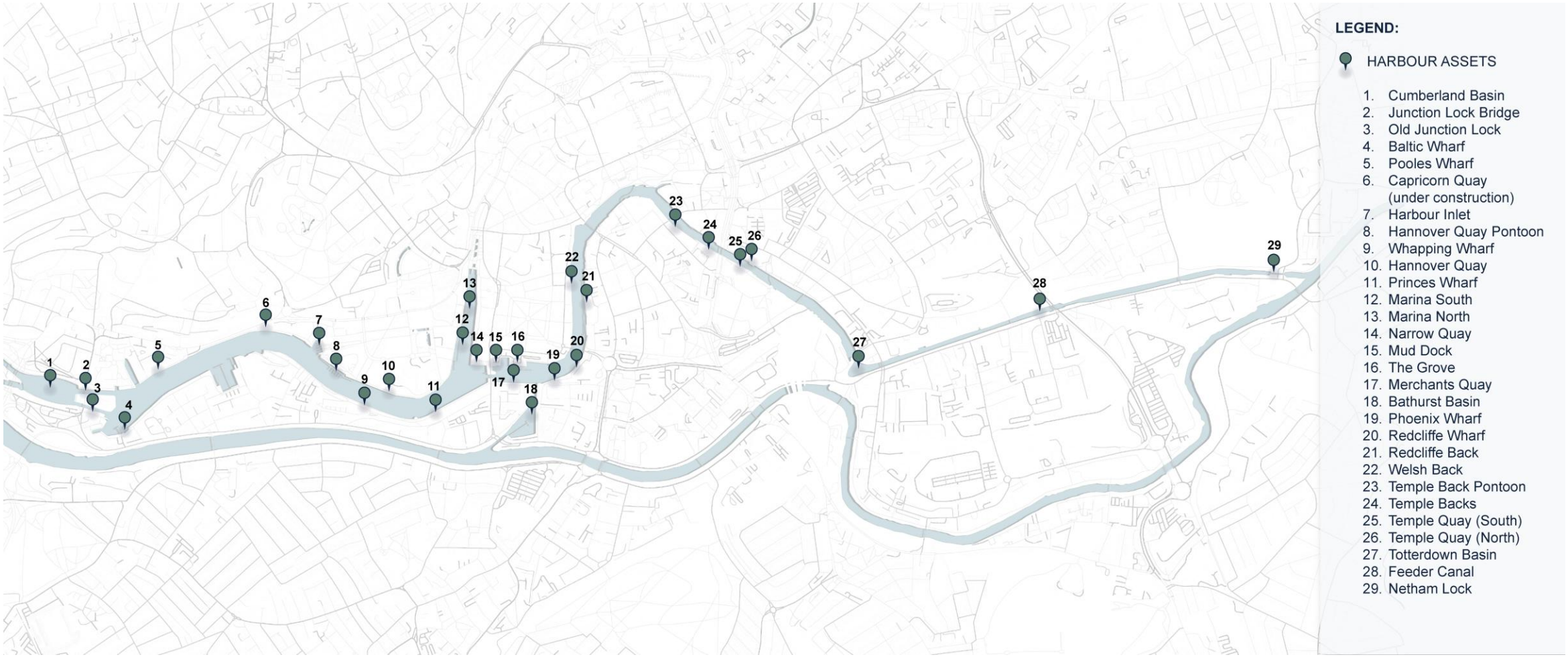



# Local Market: Bristol Harbour

# 3.1 Market Overview

This section provides an overview of the Harbour's mooring areas and key access points. It also outlines the main vessel types currently using the Harbour and identifies their distribution across the site. This understanding forms the foundation for the study work going forward and will inform subsequent analysis and recommendations.

# Local Market Overview



# Local Market

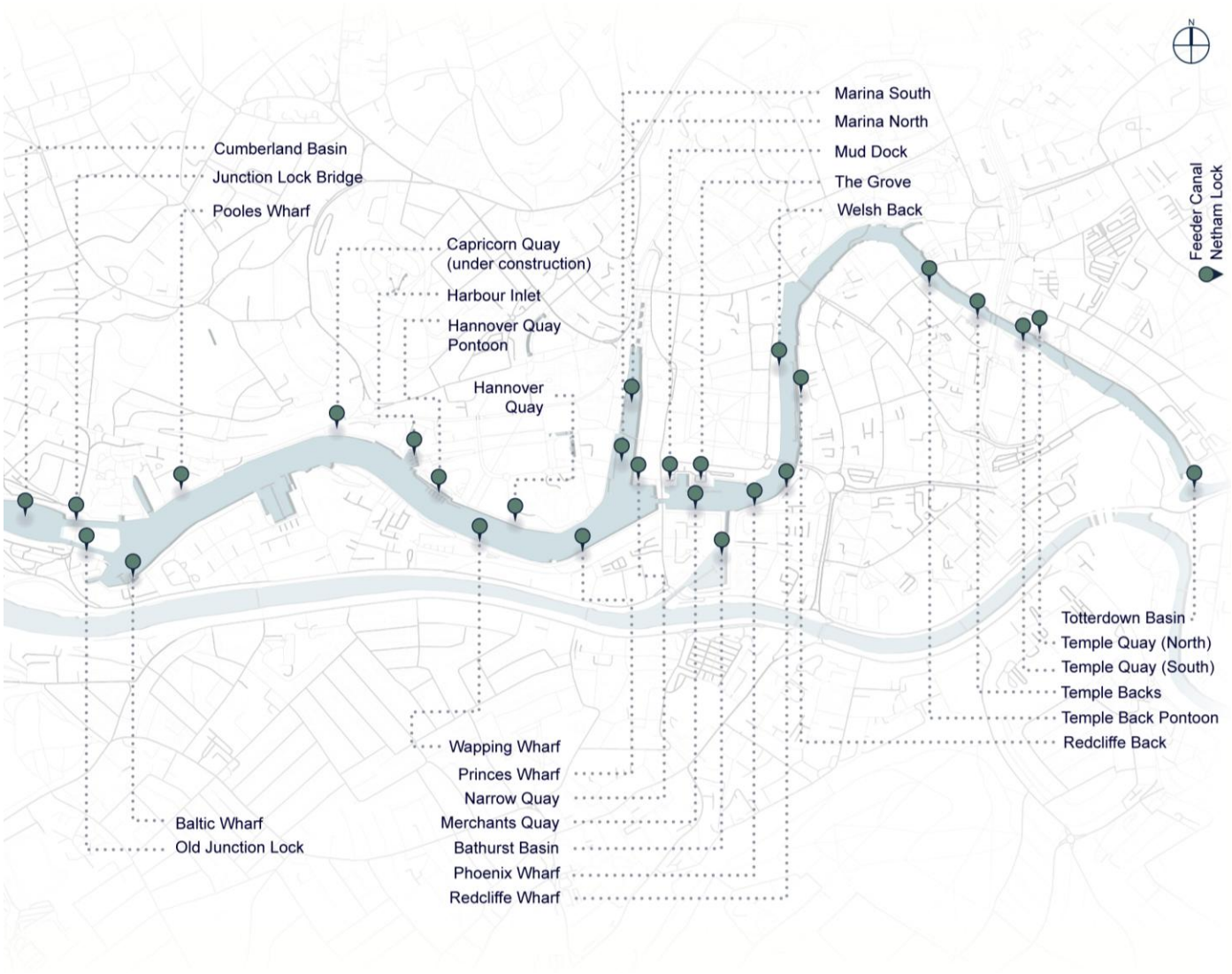
There are a wide variety of mooring areas within Bristol Harbour, with vessels able to berth against a quay wall or on walk-ashore pontoon berths (both alongside and finger pontoons). The character and quality of these mooring areas vary across the Harbour. Among them Hannover Quay, Inlet Harbour and The Grove are regarded as the most desirable locations, due to their proximity to amenities, secure berthing, and position setback from the main nightlife areas.

There is a notable reduction in vessel activity east of Bristol Bridge (Temple area). This corresponds with the surrounding landside which transitions to a quieter area of the city with a greater concentration of commercial offices in contrast to the lively central Harbourside and M-Shed areas.

A large proportion of all moorings within the Harbour are owned and managed by Bristol Harbour Authority. It is noteworthy that there are 3 other operators that provide moorings and are discussed in Section 3.3.

It is important to identify the existing distribution of vessel types within the Harbour and their relationship with the adjacent landside areas. This will form the basis of the development of a rezoning plan.

The following pages provide an overview of the different vessel types within the Harbour, along with location plans for each type, based on information provided by BHA from Havenstar (marina management software).



# Vessel Types



**Narrowboat**
LOA: Up to 22m | Beam: Up to 2m

Vessels specifically designed to navigate the inland waterways of the UK with the maximum length and beam (width of a boat at its widest point) built to conform to the dimensions of locks in the canal system.

Modern leisure narrowboats function as a floating home equipped with the amenities necessary for long term living on the water. They are commonly used for holidays, touring sections of the canal network, or as permanent or part-time residences.




**Widebeam**
LOA: Up to 22m | Beam: Typ. 3m

A widebeam vessel is defined by a beam exceeding that of a standard narrowboat, typically ranging from 3m to 3.65m.

Widebeam vessels are used in the same way as narrowboats, primarily for cruising the canal network or as a residence. Their main advantage is the additional living space provided by the greater width. However, the wider beam can restrict cruising activities and access to certain sections of the canal network.



**Barge**
LOA: Up to 36m

Traditionally used to transport cargo, many barges have been converted for leisure or residential use.

While they serve similar purposes to narrowboats and widebeam vessels, most barges are unable to cruise the inland waterways due to their size, which prevents them from passing through the locks. Within Bristol Harbour, a small number of barges are used as permanent homes.

# Vessel Types



**Day Boat**
LOA: Up to 10m

Small vessels (motor & sail) used for leisure purposes, generally designed with no accommodation with activity limited to short durations i.e. 2-3 hours either visiting a local destination or as a day out on the water.



**Cruising Vessel**
LOA: 10.01 – 30.00m

Vessels are generally used in a similar way to day boats, for recreational day-boating activities. However, they are designed with overnight accommodation and can travel longer distances, often forming part of a multi-day travel itinerary.



**Superyacht**
LOA: 30.01m & above

Large, ultra-luxury motor or sailing vessels designed primarily for leisure, though they can also be used for exploration or scientific research. Designed for extended cruising, vessels are typically privately owned by UHNWI/HNWI, they are also available for charter through professional brokers.

Operated and managed by a dedicated crew and captain, these vessels provide an exceptional luxury experience, featuring a wide array of high-end amenities and on-board activities.

# Vessel Types




## Commercial Vessel
LOA: Up to 52m

Within Bristol Harbour there are 10 vessels used for commercial purposes, providing floating spaces primarily for leisure activities including restaurants & bars, a hotel, live music venue with one vessel dedicated to specialist mast construction.

All vessels are accessible by the public and contribute to Bristol's vibrant waterfront.



## Heritage Vessel
LOA: Typ. 18m & above

Bristol Harbour features several permanent heritage vessels with connections to the city's maritime history. Some vessels such as the SS Great Britain are no longer in service and have been converted as a floating museum and tourist attraction, while others such as The Matthew of Bristol remain active and are used for educational purposes and sail training, boat tours and private events.

In addition to these permanent vessels, a number of visiting vessels such as replica tall ships moor in the Harbour for short periods or as part of the Harbour Festival creating interest on the water.




## Passenger Vessel
LOA: Up to 21m

In Bristol Harbour, passenger vessels can be categorised as follows:

**Ferries:** Small vessels providing transport services along dedicated routes with scheduled stops at designated ferry landings, serving both visitors and daily commuters.

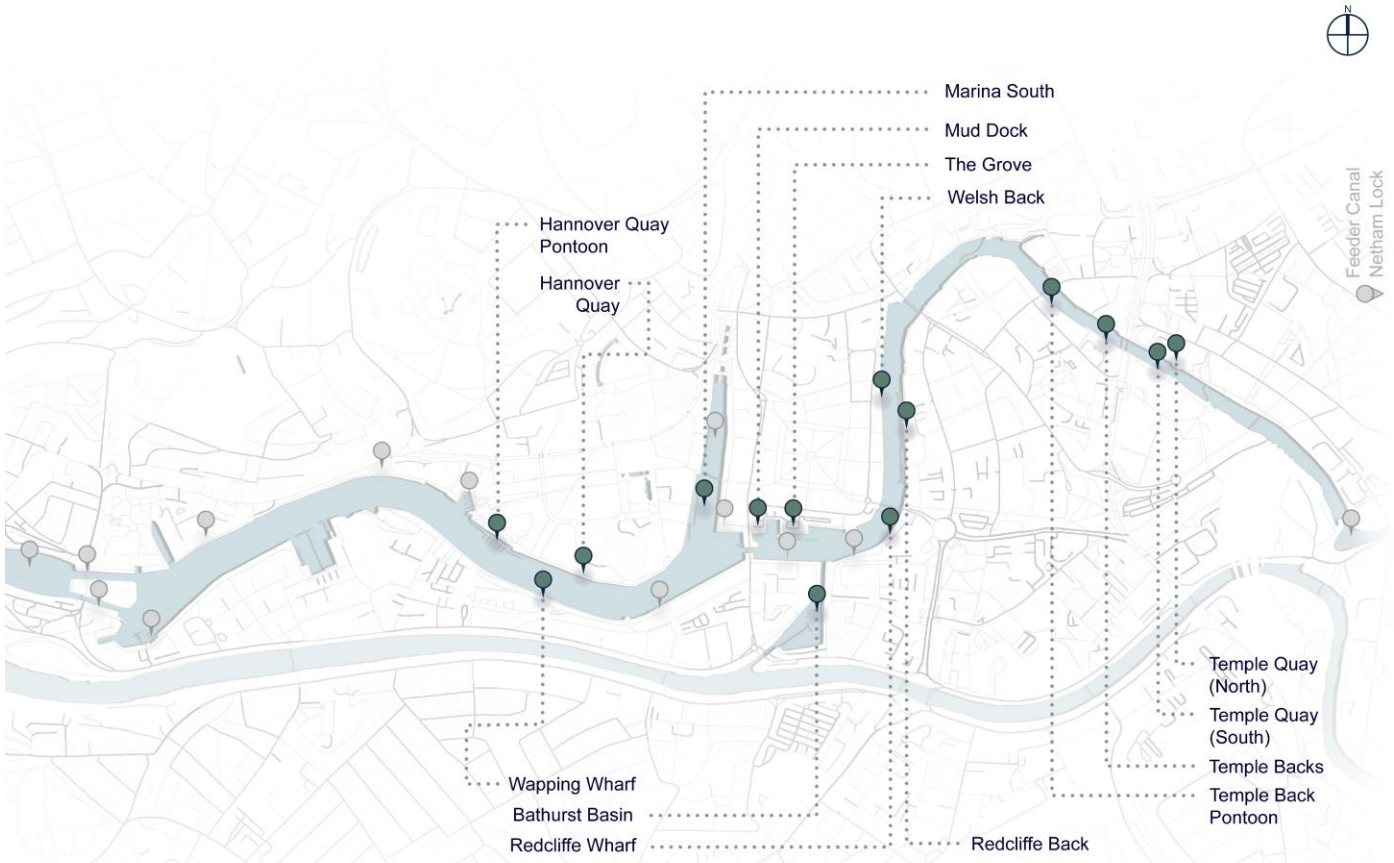
**Light Commercial:** Operators offering leisure and tourism services including group tours both within the Harbour and along the Kennet and Avon Canal and Avon Gorge, with boats also available for private hire.

# Local Market: Liveaboard Vessels

In the context of Bristol Harbour, liveaboard vessels are typically narrowboats, widebeam vessels or barges that serve as an individuals primary place of residence. These vessels are primarily moored within the Harbour but have the capability to travel along the wider canal network.

Following an assessment of vessel data provided by BHA from Havenstar, the following observations can be made:

- A total of 34 vessels are used for residential purposes.
- Of these, 22 hold an annual liveaboard licence.
- The remaining 12 vessels hold long term licences, with a number of contracts containing a right to renew clause.
- Vessels are berthed throughout the Harbour on a combination of pontoon and wall moorings.
- A number of vessels are moored in busy public areas with high footfall and activity during the day and evening, such as Marina South and Hannover Quay. This can create potential conflicts with landside users.
- It is assumed vessels may prefer to moor here due to proximity of facilities, security and access arrangements.
- Indicates a requirement for rezoning of the Harbour and introducing a wider range of facilities to service these vessels.



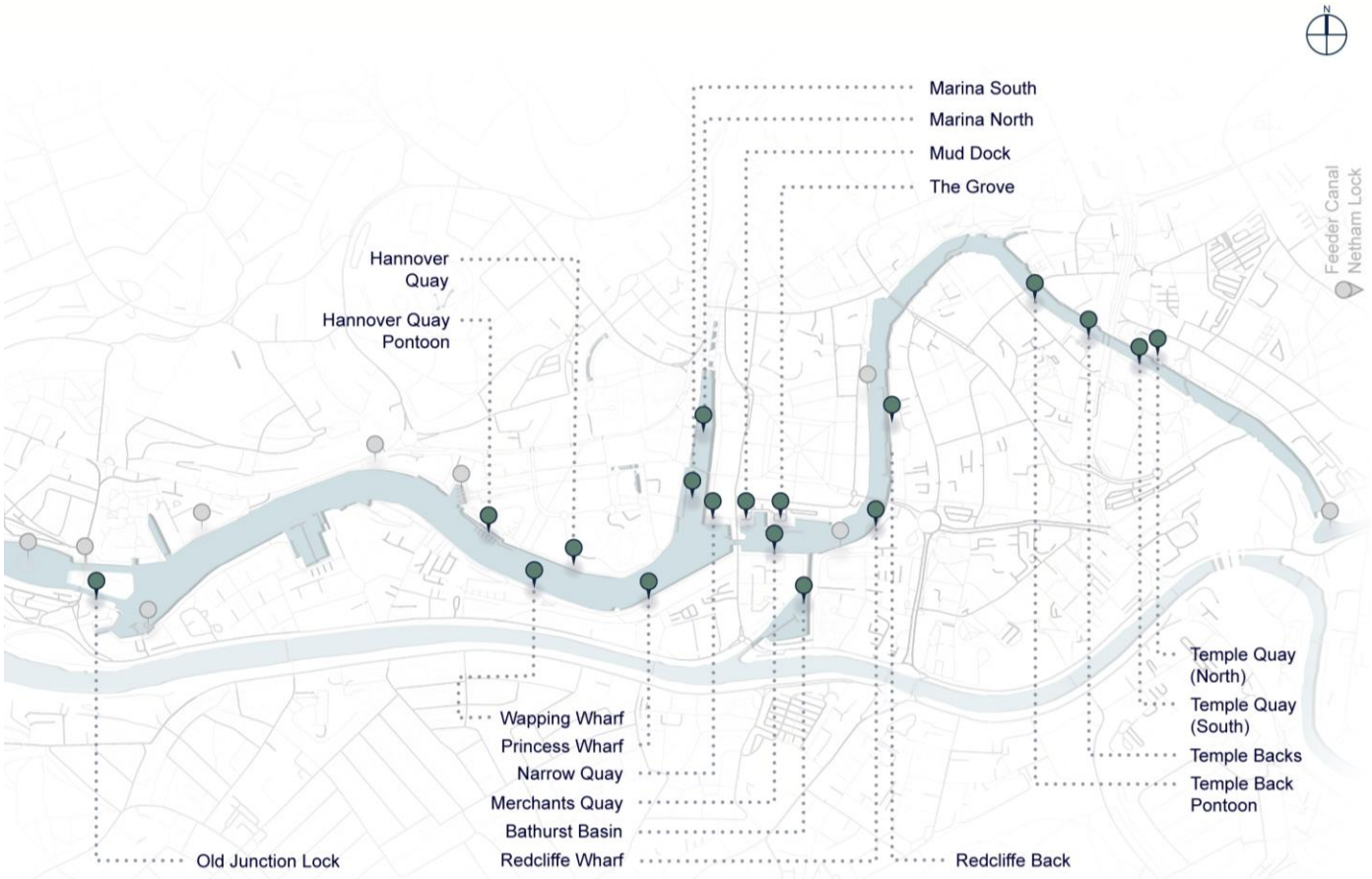

*Note: For the purposes of this section of analysis only vessels berthed on Harbour owned assets are considered.*

# Local Market: Leisure Vessels

Leisure vessels are used exclusively for recreational purposes, ranging from day trips where a vessel is used for part of a day within the Harbour or at a nearby destination, to longer journeys over an extended period which involves overnight stays onboard. These vessels are categorised as day boats, cruising vessels or superyachts and can be either motor or sail powered.

Following an assessment of vessel data provided by BHA, the following observations can be made:

- There are 142 vessels with an annual leisure licence. This excludes passenger vessels which are discussed separately.
- Similar to liveaboard vessels, leisure vessels are currently moored throughout Bristol Harbour on a combination of pontoons and wall moorings.
- Although not yet operational, the new Capricorn Quay pontoons are expected to provide additional moorings for leisure vessels.
- Several leisure mooring areas overlap with liveaboard moorings, suggesting potential opportunities to reorganise the layout to better segregate different types of vessel activity.




*Note: For the purposes of this section of analysis only vessels berthed on Harbour owned assets are considered.*

# Local Market: Commercial & Heritage Vessels

**Commercial Vessels**

There are 10 vessels operating under commercial licences within Bristol Harbour. The majority of vessels serve leisure and entertainment purposes with two used for marine construction related activities.

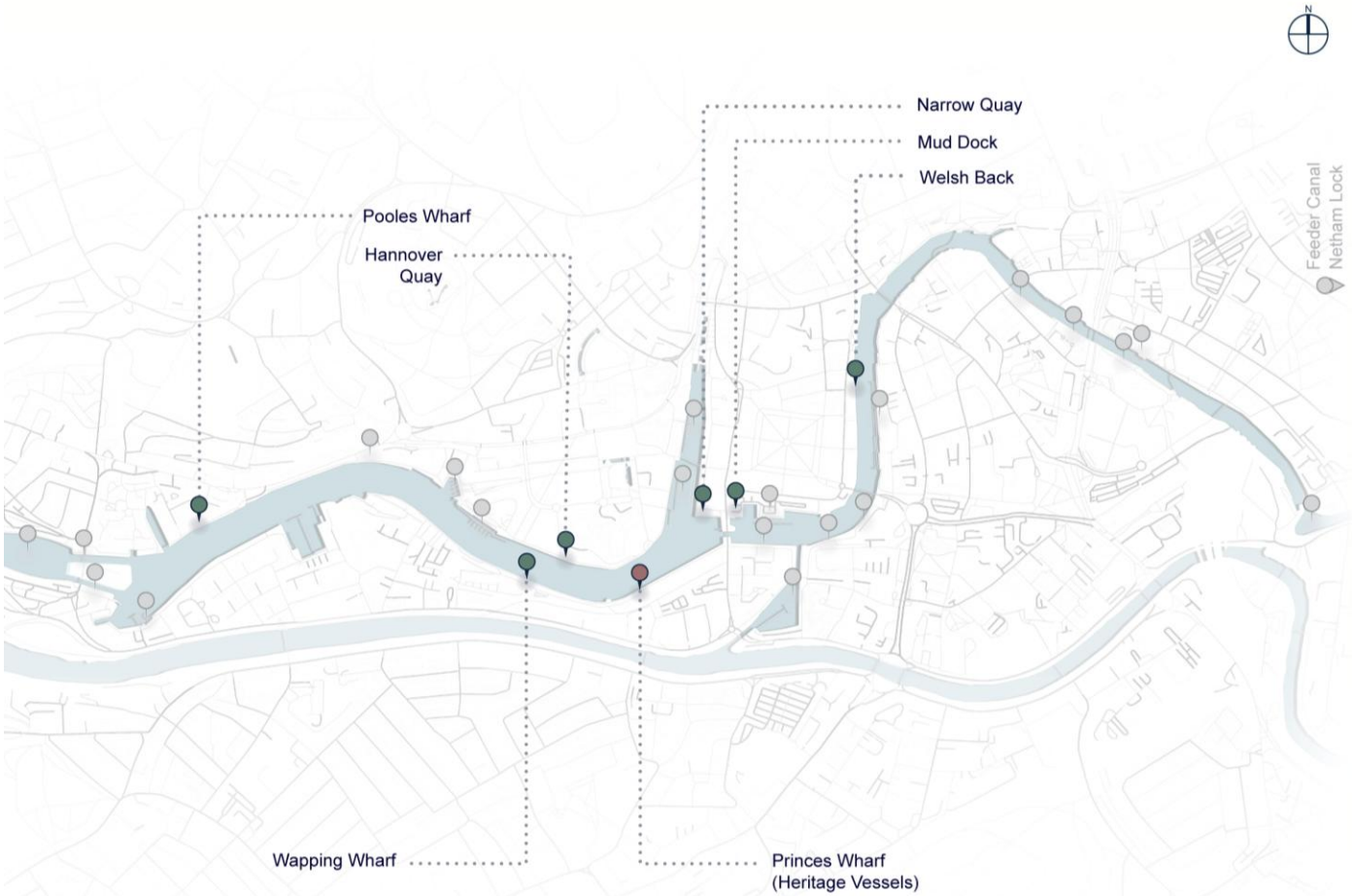
The vessels are generally well distributed throughout the Harbour which contribute to its character, offering distinctive experiences without overwhelming the Harbourside. There is a modest concentration of leisure-oriented commercial vessels around Welsh Back, offering dining and bar facilities, which complements the F&B offering on King St.

There is potential to increase the number of commercial vessels, to enhance vibrancy, encourage continuous waterfront activity, and activate quieter sections of the Harbour, while remaining sympathetic to existing uses and the Harbour's overall character.

**Heritage Vessels**

Heritage vessels are moored at Princes Wharf which reflects the areas shipbuilding and industrial past. The moorings are also connected to Wapping Wharf and the CARGO food and retail destination.

This creates a unique blend of historic character and modern activity which could be capitalised on with an increased number of heritage vessels and ferry linkages to connect the public on the southern side of the Harbour with the Amphitheatre and central Harbourside.




*Note: For the purposes of this section of analysis only vessels berthed on Harbour owned assets are considered.*

# Passenger Vessels

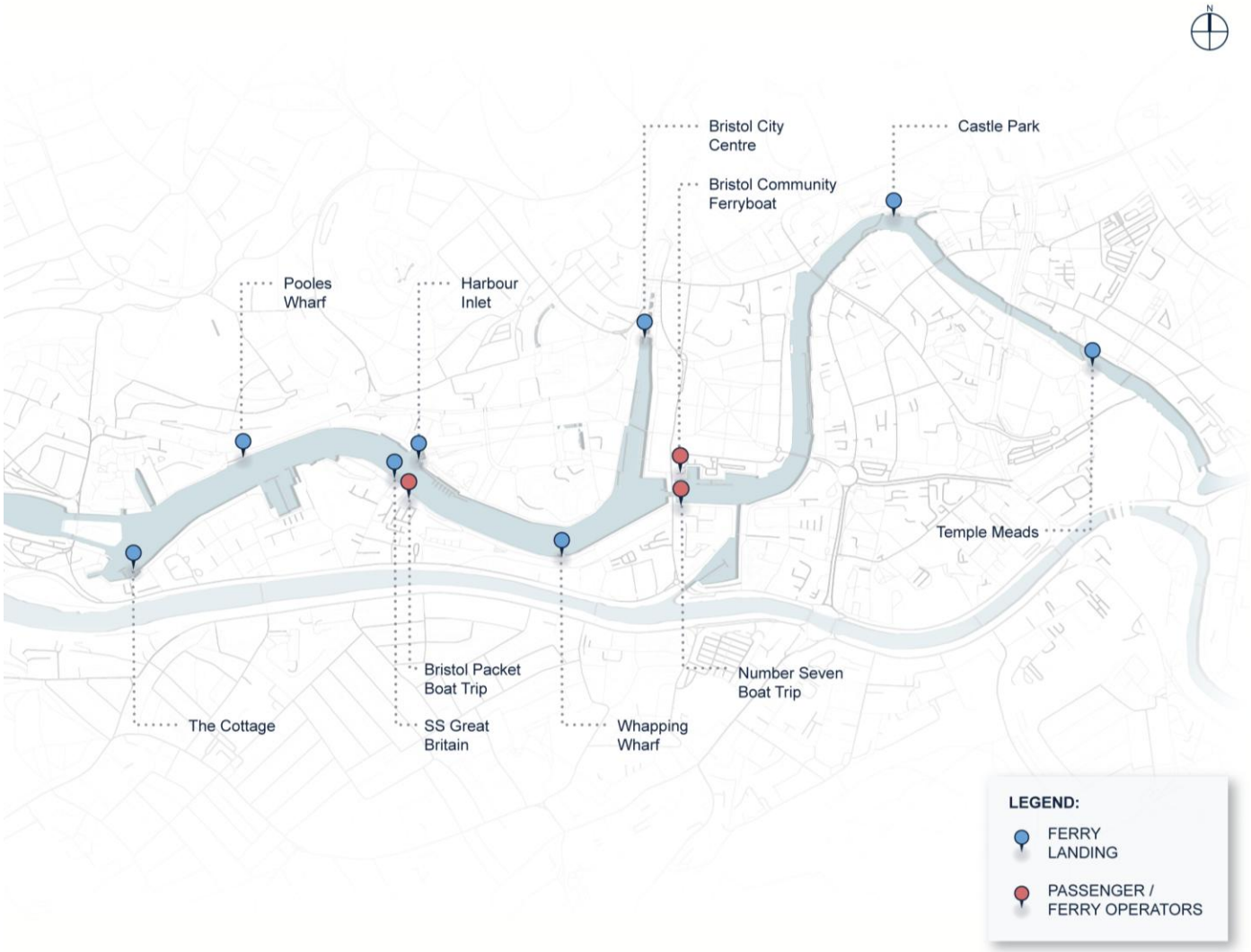
Passenger vessels within Bristol Harbour are defined as:

**Ferries:** Vessels operating on scheduled routes for visitors and commuters.

**Light Commercial:** Vessels offering leisure and tourism services i.e. sightseeing tours within the Harbour and the Kennet and Avon Canal/Avon Gorge.

The following observations are of note:

- There are 16 passenger vessels (5 ferry & 11 light commercial) in the Harbour.
- These vessels hold leisure licences but also pay additional commercial charges.
- There are 8 ferry landings well distributed throughout the Harbour.
- Bristol Community Ferryboats operate the primary ferry services within the Harbour, calling at all landings with the exception of Harbour Inlet.
- Number Seven Boat Trip operates the only cross Harbour ferry service between SS Great Britain and Harbour Inlet.
- There is an opportunity to introduce additional cross Harbour ferry stops to encourage movement across the Harbour and reduce road traffic.
- Furthermore, there is an opportunity to expand the ferry stops at either end of the Harbour as the Temple Quarter and West Harbour regeneration projects are delivered.
- Opportunity to relocate these vessels from prime mooring areas which would unlock valuable waterfront space. It remains important to provide suitable alternative locations with good access and landside facilities to support water transport operations.




*Note: For the purposes of this section of analysis only vessels berthed on Harbour owned assets are considered.*

# Vessel Mooring Location Summary

| | Liveaboard | Leisure | Commercial | Heritage | Passenger |
|---|---|---|---|---|---|
| Bathurst Basin (Pontoons & Wall) | Y | Y | N | N | N |
| The Grove (Pontoons & Wall) | Y | Y | N | N | N |
| Hannover Pontoons & Quay | Y | Y | Y | N | N |
| Merchants Quay | N | Y | N | N | Y |
| The Mud Dock | Y | Y | Y | N | Y |
| Narrow Quay | N | Y | Y | N | N |
| Old Junction Lock | N | Y | N | N | N |
| Princes Wharf | N | Y | N | Y | N |
| Pooles Wharf | N | N | Y | N | N |
| Marina North | N | Y | N | N | N |
| Marina South | Y | Y | N | N | N |
| Redcliffe Wharf | Y | Y | N | N | N |
| Redcliffe Back | Y | Y | N | N | N |
| Temple Back (Pontoons & Wall) | Y | Y | N | N | N |
| Temple Quay | Y | Y | N | N | N |
| Wapping Wharf | Y | Y | Y | N | Y |
| Welsh Back | Y | N | Y | N | N |

## 3.2 Bristol Harbour Vessel Data

The Client provided a number of datasets relating to vessels managed by BHA and a small number managed by Property Services. The data covers existing mooring holders, waiting and reallocation lists, and visitor data.

This information has been analysed to provide a comprehensive understanding of current activity within the Harbour and demand from annual mooring holders and visitors.

Collectively, this analysis will be used to inform the rezoning plan, licence and tariff recommendations, as well as to identify the market segments to target.

# Bristol Harbour Vessel Mix

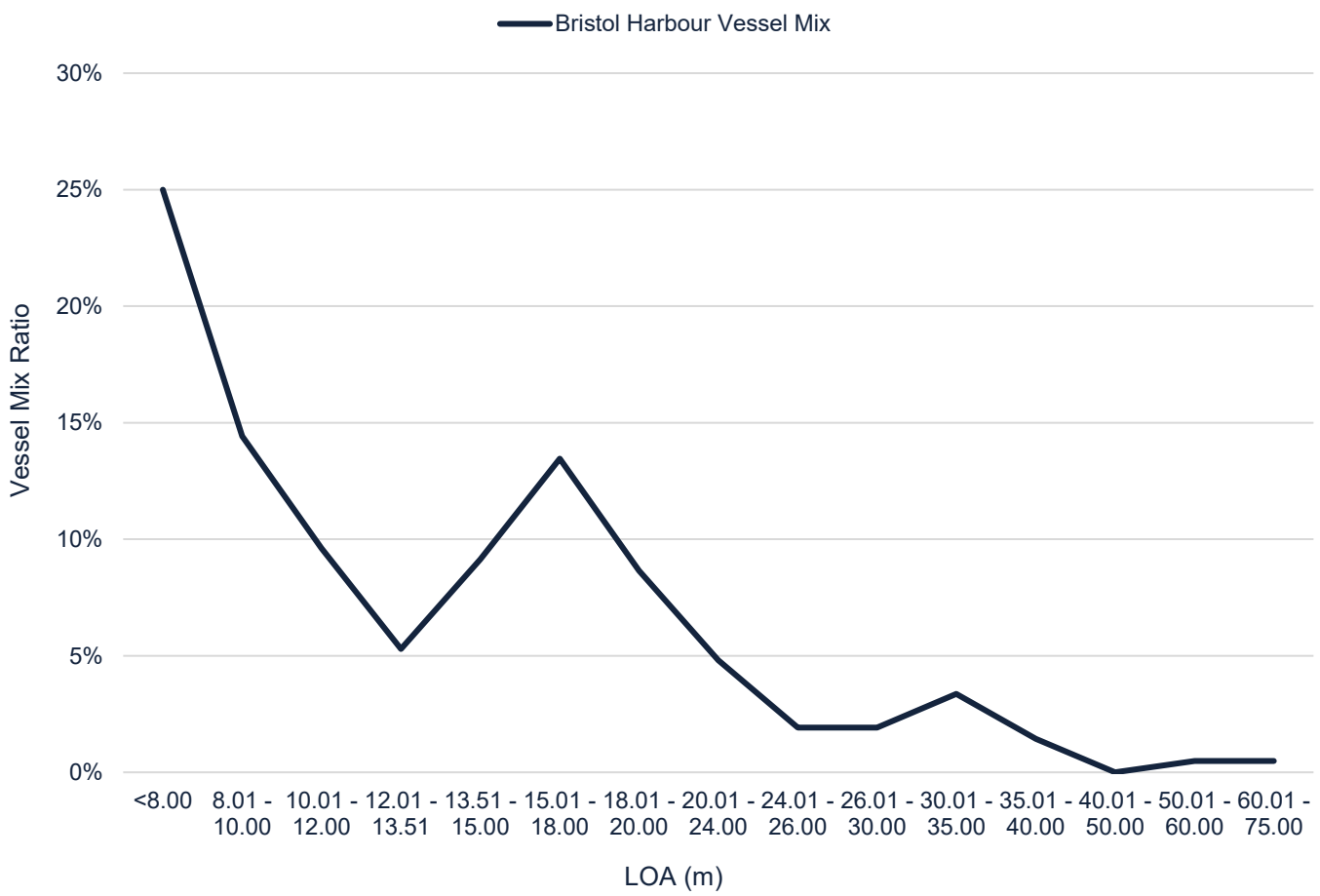
BHA provided existing mooring data from Havenstar and a schedule of vessels managed by Property Services which includes all vessels that hold commercial and residential long term licences. These datasets have been combined in order to provide a complete overview of all vessels currently moored in the Harbour.

The vessel mix for Bristol Harbour is provided in the below schedule. Further analysis of the vessel mix is provided on the following page.

| LOA (m) | Number | Ratio |
|---|---|---|
| ≤8.00 | 52 | 25% |
| 8.01 - 10.00 | 30 | 14% |
| 10.01 - 12.00 | 20 | 10% |
| 12.01 - 13.50 | 11 | 5% |
| 13.51 - 15.00 | 19 | 9% |
| 15.01 - 18.00 | 28 | 13% |
| 18.01 - 20.00 | 18 | 9% |
| 20.01 - 24.00 | 10 | 5% |
| 24.01 - 26.00 | 4 | 2% |
| 26.01 - 30.00 | 4 | 2% |
| 30.01 - 35.00 | 7 | 3% |
| 35.01 - 40.00 | 3 | 1% |
| 40.01 - 50.00 | 0 | 0% |
| 50.01 - 60.00 | 1 | 0.5% |
| 60.01 - 75.00 | 1 | 0.5% |
| **Total** | **208** | **100%** |



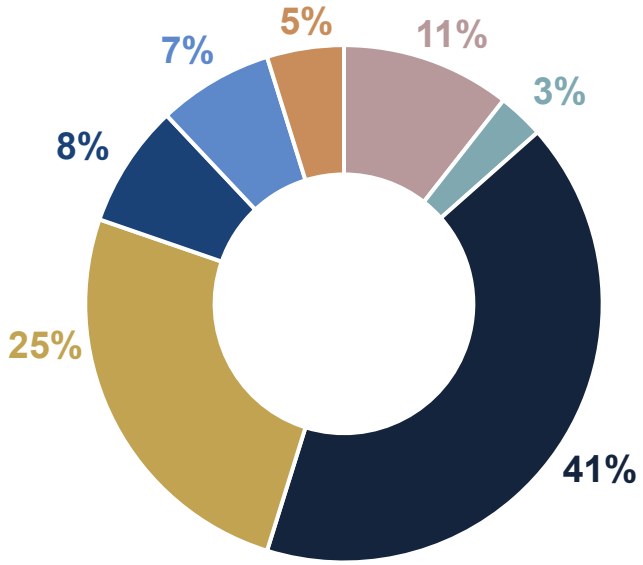
# Bristol Harbour Vessel Profile




- There are 208 vessels moored on an annual basis in Bristol Harbour. This number only includes vessels managed by the Harbour and Property Services.
- Approximately 50% of vessels are 12m and below. This reflects the typical vessel profile of boats navigating the Bristol Channel where challenging tidal conditions favour smaller vessels, and on the Kennet and Avon Canal where vessel size is constrained by draft, air draft and lock dimensions.
- There is a concentration of activity in vessels 13.51m – 20m, accounting for around 30% of activity. This reflects the high number of narrowboats, widebeam vessels and barges in the Harbour.
- Approx. 80% of all vessels with a liveaboard licence are between 13.51m - 20m. The majority of vessels are narrowboats, widebeam vessels or barges. This provides guidance on the berth lengths that should be introduced for any new liveaboard mooring areas.
- There are a small number of larger vessels up to 75m. These vessels are a combination of commercial vessels and those on long term residential licences.
- The vessel mix in Bristol Harbour reflects the diverse activities and user groups present within the Harbour.
- The typical lengths associated with different vessel types will help inform the rezoning plan by guiding where vessels may be reallocated. Where new moorings are proposed, it will also inform the appropriate sizes of berths to provide.



## Bristol Harbour Vessel Type




| Vessel | Ratio |
|---|---|
| Motor | 41% |
| Narrowboat & widebeam | 25% |
| Barge | 11% |
| Passenger | 8% |
| Sail | 7% |
| Commercial | 5% |
| Heritage | 3% |

- Motor vessels and narrowboats (including widebeam vessels) account for approximately 70% of all activity. This provides clear direction on which market segments to prioritise particularly with respect to leisure and residential moorings.
- This is further supported by the number of barges, with 22 of these vessels holding a leisure, liveaboard or long term residential licence.
- Sail, commercial and heritage vessels account for a modest proportion of all vessel activity. This represents an area with potential for growth.

# Bristol Harbour Licences

Bristol Harbour operates a number of licences which are summarised in the table below.

| Licence | Number | Ratio |
|---|---|---|
| Leisure (inc. passenger vessels) | 158 | 76% |
| Liveaboard | 22 | 11% |
| Long Term Commercial | 10 | 5% |
| Long Term Residential | 12 | 6% |
| Property Services* | 6 | 3% |
| **Total** | **208** | **100%** |

BHA and Property Services have provided useful insights of the various licences in effect across the Harbour, these are summarised in Appendix B. Key observations are provided here and will inform the financial overview work as this progresses.

- A broader range of licence types should be introduced to address the range of activity and user groups in the Harbour.
- A small number of vessels currently do not hold licences. It is recommended that all vessels in the Harbour should hold a licence and contribute the appropriate fees.
- Verification of licences for all vessels. This is particularly important for leisure vessels as some are understood to be used for residential purposes.
- Consideration should be given to the use of the terms ‘residential’ and ‘liveaboard’ within mooring agreements, as they may inadvertently imply entitlements or rights for licence holders, potentially exposing BHA to legal or operational challenges during regeneration efforts.
- It is acknowledged by the Harbour team of the preference to transition all commercial vessels on to commercial licences. These licences would incorporate an element of profit sharing, combined with lower fixed berthing fees, creating a fairer and more sustainable model that incentivises operators while increasing Harbour revenue.



**There are a small number of heritage vessels which are managed by Property Services. These vessels do not hold a licence, for the purposes of analysis these have been listed separately.*

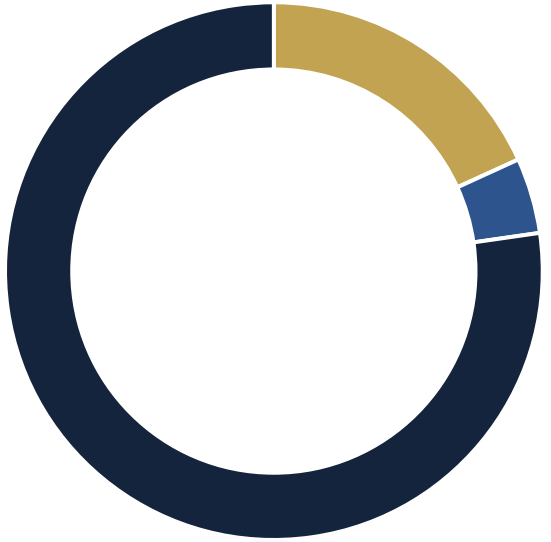
# Waiting List Vessel Mix

BHA operates a waiting list for those vessels wishing to secure an annual mooring in the Harbour. A summary of the vessels is provided below:

| LOA (m) | Number | Ratio |
|---|---|---|
| ≤8.00 | 3 | 14% |
| 8.01 - 10.00 | 1 | 5% |
| 10.01 - 12.00 | 2 | 9% |
| 12.01 - 13.50 | 1 | 5% |
| 13.51 - 15.00 | 1 | 5% |
| 15.01 - 18.00 | 7 | 32% |
| 18.01 - 20.00 | 5 | 23% |
| 20.01 - 24.00 | 2 | 9% |
| **Total** | **22** | **100%** |

- There are a total of 22 vessels on the waiting list as of October 2025.
- The waiting list is weighted towards larger vessels which is reflected in the vessel type analysis with almost all vessels being narrowboats, widebeam vessels and barges.

# Waiting List Vessel Type



**4**
**Motor Vessels**

**1**
Sail Vessel

**17**
Narrowboat/Widebeam/ Barge

- Approximately 80% of vessels on the waiting list are a narrowboat, widebeam vessel or barge.
- This clearly demonstrates the market segments making the demand for moorings in the Harbour.
- Only a small number of motor and sail vessels are on the waiting list.



# Reallocation List

In addition to the waiting list for new vessels awaiting a berth in the Harbour, BHA also maintains a separate reallocation list. This list is for existing vessels moored in the Harbour that wish to be relocated to a different mooring location. The data is summarised in the below schedule:

| Vessel Type | Number of Vessels | Vessel Length | Current Mooring Location* |
|---|---|---|---|
| Narrowboat / Widebeam | 4 | 12.5 – 16m | Temple Back, Temple Quay, Narrow Quay |
| Motor | 2 | 6.5m & 19.5m | Temple Back |
| Sail | 1 | 12.5 | Hannover Quay |
| **Total** | **7** | | |

The reasons for individuals wishing to move are varied but can be summarised as follows:

- Issues related to antisocial behaviours and noise
- Availability of utilities (power/water)
- Desire for secure moorings and more convenient access
- Preference to be on a pontoon mooring as opposed to quay wall moorings

This provides valuable insight into the types of facilities and mooring environments that are most desirable and should be prioritised as part of the wider Harbour strategy and capital investment.

Notably, several vessels currently moored in the Temple Quay/Backs area are seeking to move. Noting the aspiration to increase mooring capacity in this area and the Feeder Canal, the success of any proposed new moorings is likely to be influenced by the availability and quality of these key amenities.

**The current mooring locations of two of the vessels is unknown and therefore not included in the summary.*

# Visitor Data

Bristol Harbour provided visitor data recorded via the Sail Bristol app. The app is used by visitors to book a mooring for short term periods. The dataset has been analysed to establish a profile of annual visitor activity, visitor income and other related insights. The data is provided on the following pages.

**Methodology**

- While the majority of visitor bookings are made via the Sail Bristol app, additional bookings can be made in person at the Harbour Office and Netham Lock. Only app-based bookings are included within the analysis; therefore, the total number of visitors is likely understated.
- The data assessed covers the period 1st January 2025 to 30th September 2025.
- The data is self reported by visitors and not all data fields are completed. Only data that was provided has been assessed.
- Vessel length can be entered in either feet or metres, and there is currently no reliable way to distinguish between these units in the dataset. Consequently, vessel length analysis has not been undertaken.
- Vessel type information is not captured; therefore, it has not been possible to determine which types of vessels most commonly visit Bristol Harbour.
- The app is also used to book manually propelled craft launches (e.g. rowing boats, paddleboards) via slipways. As these craft do not use moorings, they have been excluded from the analysis.
- A number of visitors are repeat users or may own multiple vessels. As a result, the data presented does not necessarily represent unique vessels.



## Key Visitor Statistics: January to September 2025

**1,784**

total visitor nights

**391 Unique Vessels**

visited during the period

**£39,500**

approx. revenue from visitors

**56%**

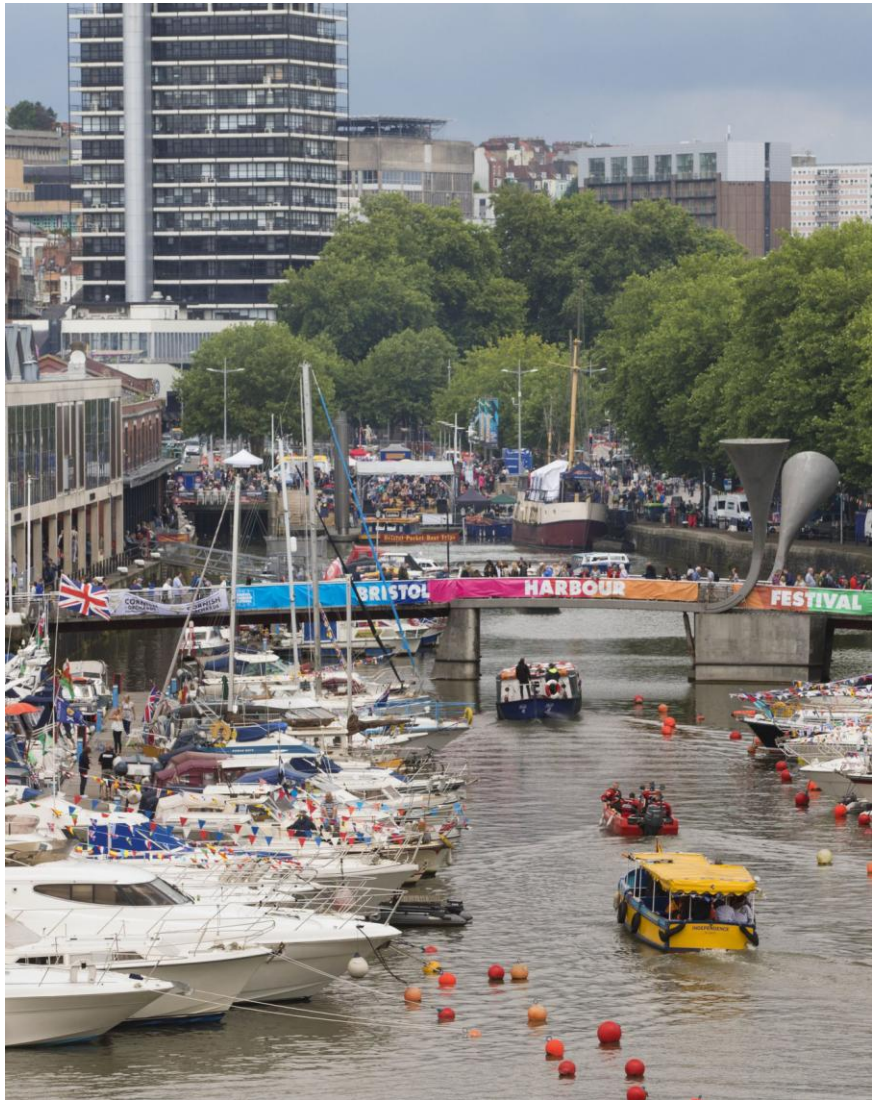
of visitors from Bristol postcode area

**111 Repeat Vessels**

visit more than once

**51%**

of visitors stay for 1 night

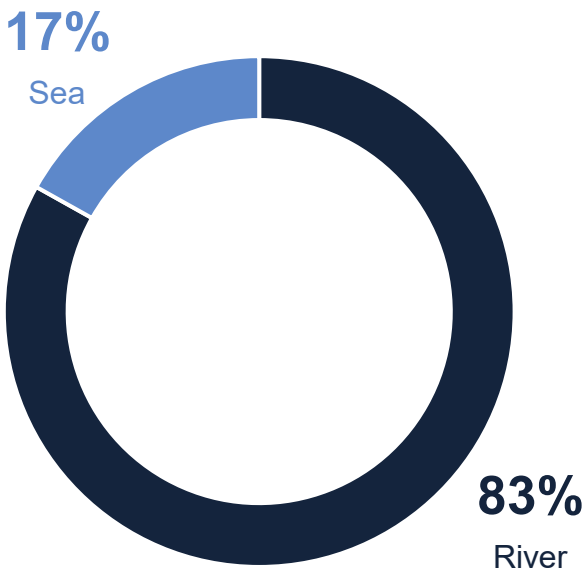



## Visitor Activity January – September 2025




- Boating activity aligns with typical seasonal patterns, with the summer months being the most popular.
- There is a significant uptick in activity in week 29, coinciding with the annual Harbour Festival.
- It is understood visiting vessels are typically moored at Harbour Inlet and Narrow Quay but they can be moored elsewhere during busy periods.

# Visitor Arrival




- The majority of visitor activity is from the Kennet and Avon Canal.
- This aligns with information provided from the BHA team that the lock issues have significantly reduced visitor activity from the Bristol Channel in 2025.
- At the time of writing, historic visitor data (i.e. 2023, 2024) has not been provided. Therefore, it has not been possible to measure the impact of the lock issues against previous years visitor activity.
- While manual propelled craft are excluded from the overall analysis, it remains noteworthy that these craft account for a significant portion of activity in the Harbour. This activity totalled approx. 500 bookings and ~£6,800 in income.
- While this user group is not a primary focus of the Mooring Demand Study, they will be considered within the wider context of the rezoning plan as it is developed.

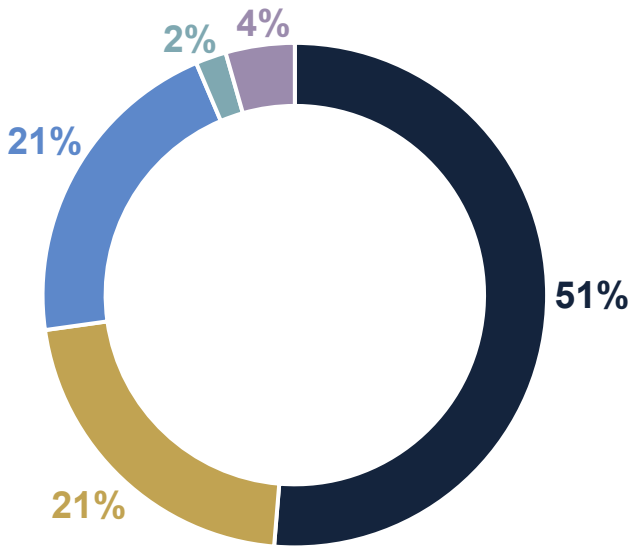








## Visitor Nights




| Nights | Ratio |
|---|---|
| 1 Night | 51% |
| 2 -3 Nights | 21% |
| 4 -7 Nights | 21% |
| 8 – 10 Nights | 2% |
| 11 – 14 Nights | 4% |

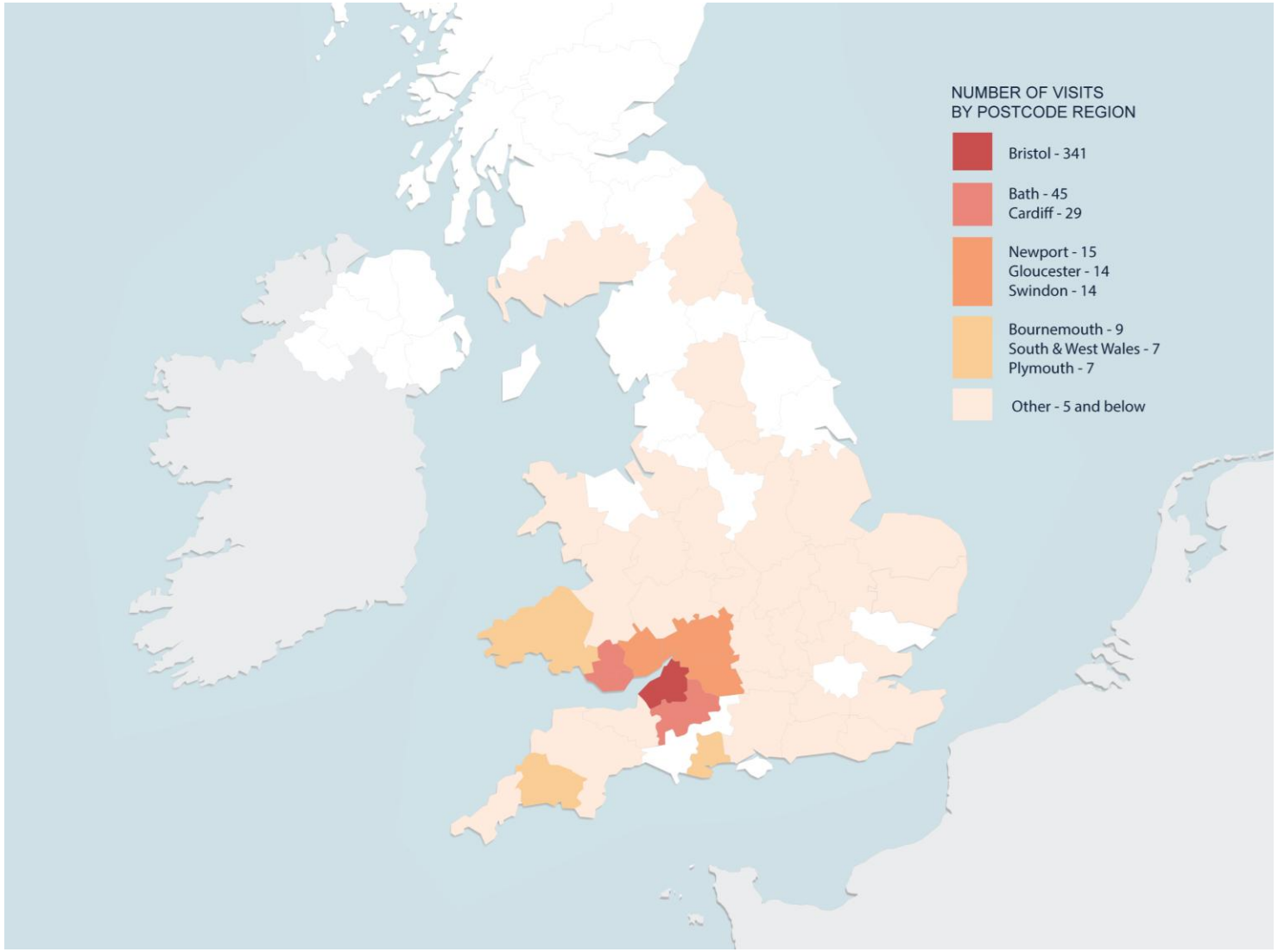
- The majority of visitors (74%) stay 1 night.
- The remainder of activity is generally split between those staying for a weekend or up to a week.
- Extended stays of 8 nights or more are uncommon, accounting for only 6% of activity.

# Visitor Origin

Assessment of visitor data has identified the areas across the UK where visitors arrive from based on postcode region.

The following observations are of note:

- Visitors from within the Bristol postcode region account for 56% of all activity.
- There is a greater concentration of visitors from nearby postcode areas, mostly around the Bristol Channel and Kennet and Avon Canal reflecting convenience and ease of access.
- It is noteworthy, however, that visitors also come from a wide range of locations across the UK, with a small number from Europe, the USA, Australia, and New Zealand.
- Acknowledging that one of the key priorities of the Harbour Strategy is to promote Bristol Harbour's profile, this data provides guidance on where marketing efforts may be focused.



# 3.3 Bristol Harbour Assets

While it is important to understand the existing mooring holders and visitor activity in the Harbour, it is equally important to consider other marine leisure activities and support facilities.

This section examines various water recreation Clubs, (cruising, rowing, etc) as well as other commercial watersport operators. In addition to on-water activity, it is also essential to consider supporting marine leisure infrastructure and customer amenities.

Together, this information provides a comprehensive overview of existing activity and market assets within the Harbour. It helps identify the location and nature of other marine leisure user groups, highlights opportunities for rezoning, and informs where new facilities could be introduced.

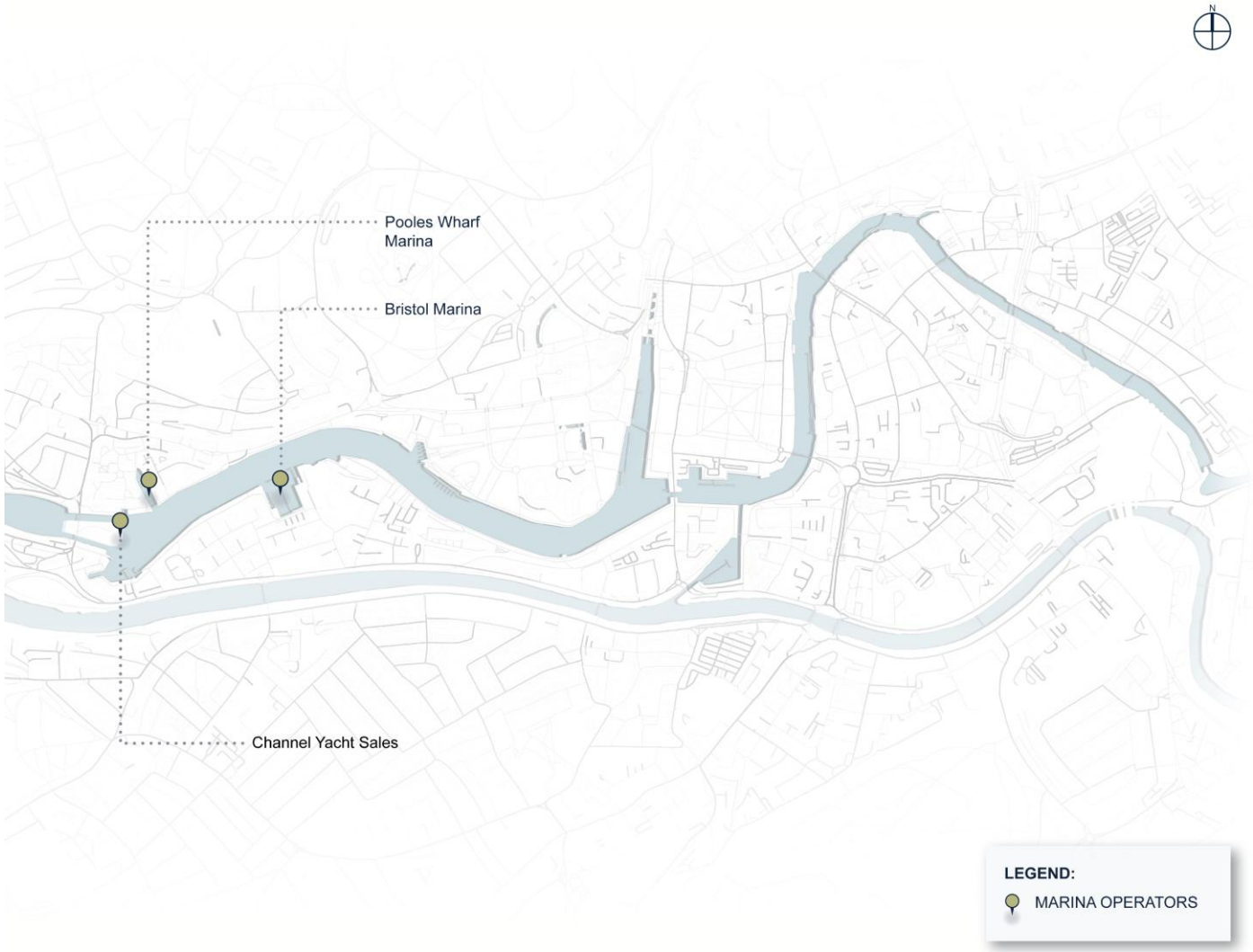
# Marina Operators

In addition to the moorings managed by BHA, there are three private operators offering moorings within the Harbour and are identified on the adjacent image.

**Channel Yacht Sales** primarily provides yacht brokerage services but does also offer a small number of annual pontoon berths.

**Bristol Marina** is the only full service facility in Bristol Harbour with serviced pontoon berths and boatyard. The marina is leased by BHA to a private entity and is noted to be of a reasonable quality.

**Pooles Wharf Marina** is a small, low quality facility within the Harbour offering quay wall alongside berthing. Vessels are often rafted alongside each other. The owner holds the freehold for the marina. Bristol Harbour does not receive income or have any involvement in the operation of this marina.



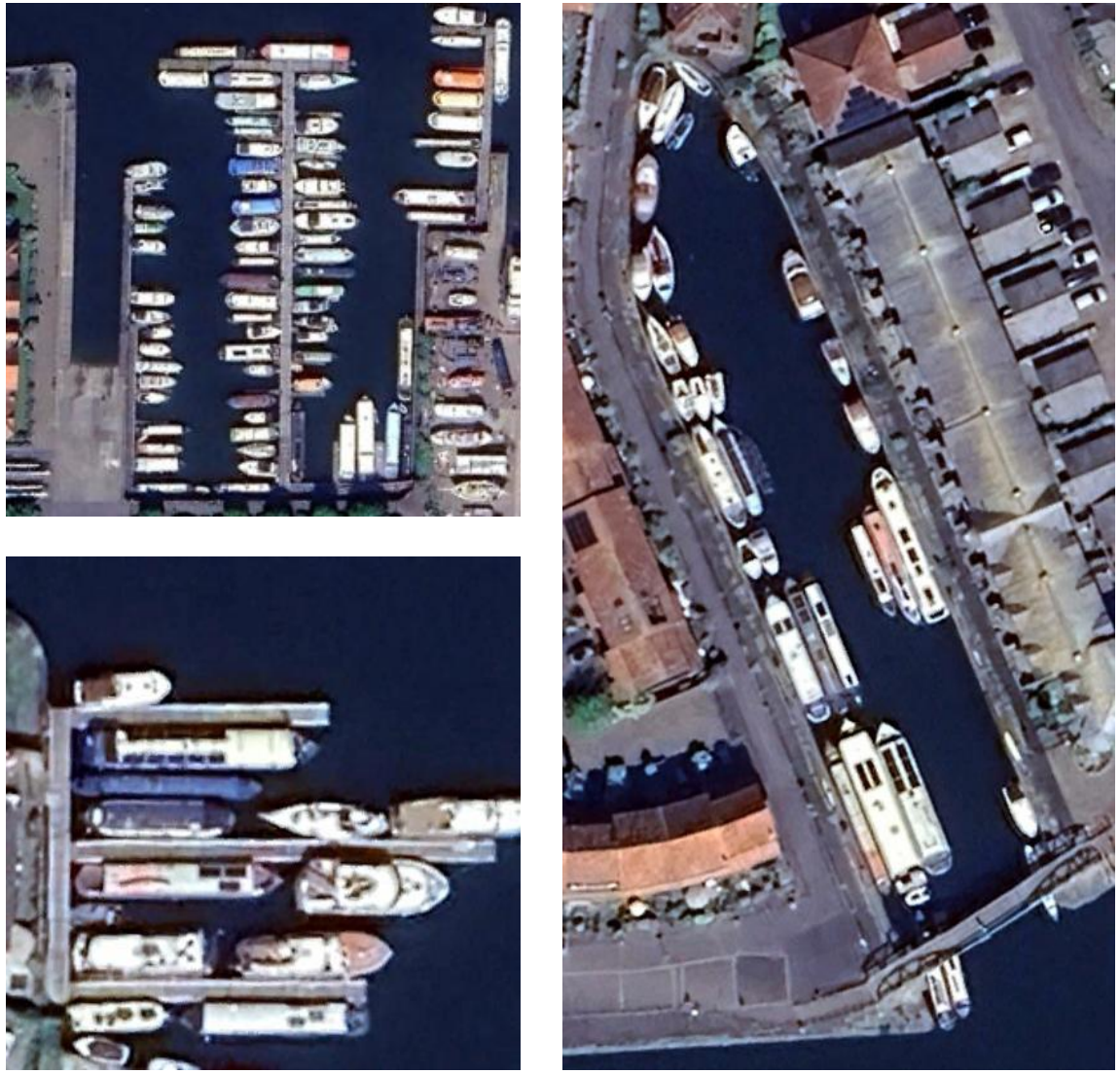
# Marina Operator Vessel Activity

Vessel activity at the three facilities has been established using recent satellite imagery which provides a snapshot of activity at a single point in time.

The vessel mix of the facilities is provided in the below table.

| LOA (m) | Bristol Marina | Channel Yacht Sales | Pooles Wharf Marina |
|---|---|---|---|
| ≤8.00 | 14 | 0 | 17 |
| 8.01-10.00 | 13 | 2 | 3 |
| 10.01-12.00 | 22 | 1 | 1 |
| 12.01-13.50 | 2 | 1 | 3 |
| 13.51-15.00 | 13 | 4 | 2 |
| 15.01-18.00 | 6 | 2 | 3 |
| 18.01-20.00 | 3 | 1 | 3 |
| 20.01-24.00 | 0 | 1 | 1 |
| **Total** | **73** | **12** | **33** |

- There are 118 vessels berthed at the different facilities.
- There are a range of vessel lengths within the Harbour reflecting the varied types of vessels and associated activities present in the market.
- The three facilities have very high to full occupancy demonstrating the strong level of demand for moorings within the Harbour.



*Top Left: Bristol Marina | Bottom Left: Channel Yacht Sales | Right: Pooles Wharf Marina*

# Marina Operator Vessel Type

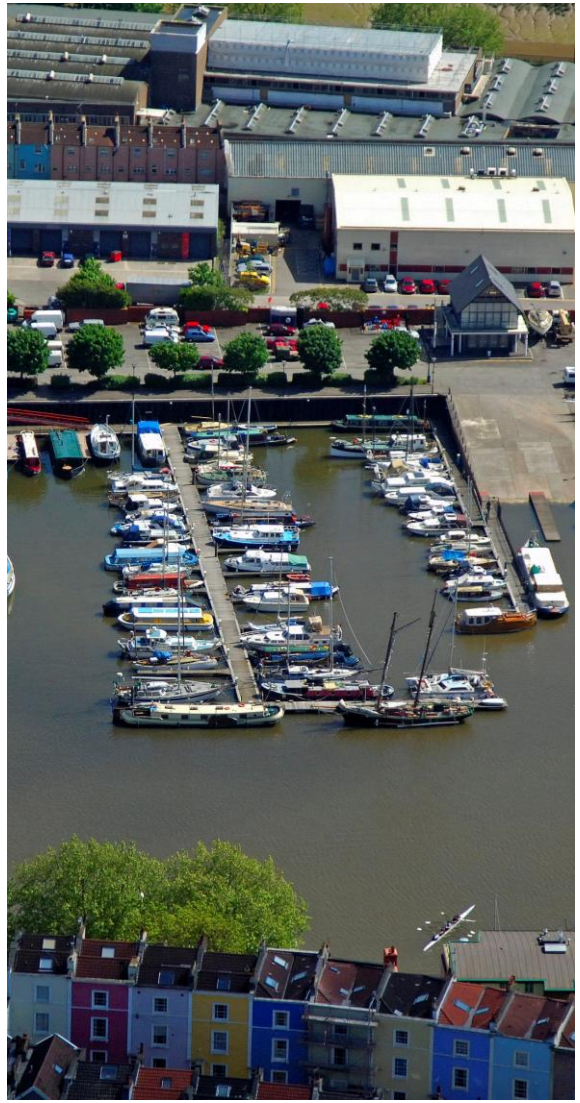
Noting the wide range of vessel lengths at the three facilities, analysis of the types of vessels has been conducted and is summarised in the below table.

| Vessel Type | Bristol Marina | Channel Yacht Sales | Pooles Wharf Marina | Total |
|---|---|---|---|---|
| Barge/ Narrow/Widebeam* | 42 | 6 | 13 | **61** |
| Motor | 25 | 5 | 15 | **45** |
| Sail | 6 | 1 | 6 | **12** |
| **Total** | **73** | **12** | **33** | |

- Approximately 50% of all vessels are barges or narrow/widebeam vessels.
- Anecdotal evidence suggests a reasonable proportion of these vessels are used for residential purposes and further highlights the demand from this vessel type within the Harbour.
- Around 40% are motor vessels indicating there is strong marine leisure activity in the Harbour.
- 80% of all motor and sail vessels are 10m & below.
- Barges and narrow/widebeam vessels are generally larger in size ranging from 12m to 24m.







*Top Left: Pooles Wharf Marina | Bottom Left: Channel Yacht Sales | Right: Bristol Marina*

**For the purposes of this section of analysis, barges and narrow/widebeam vessels have been grouped together due to their similar uses.*

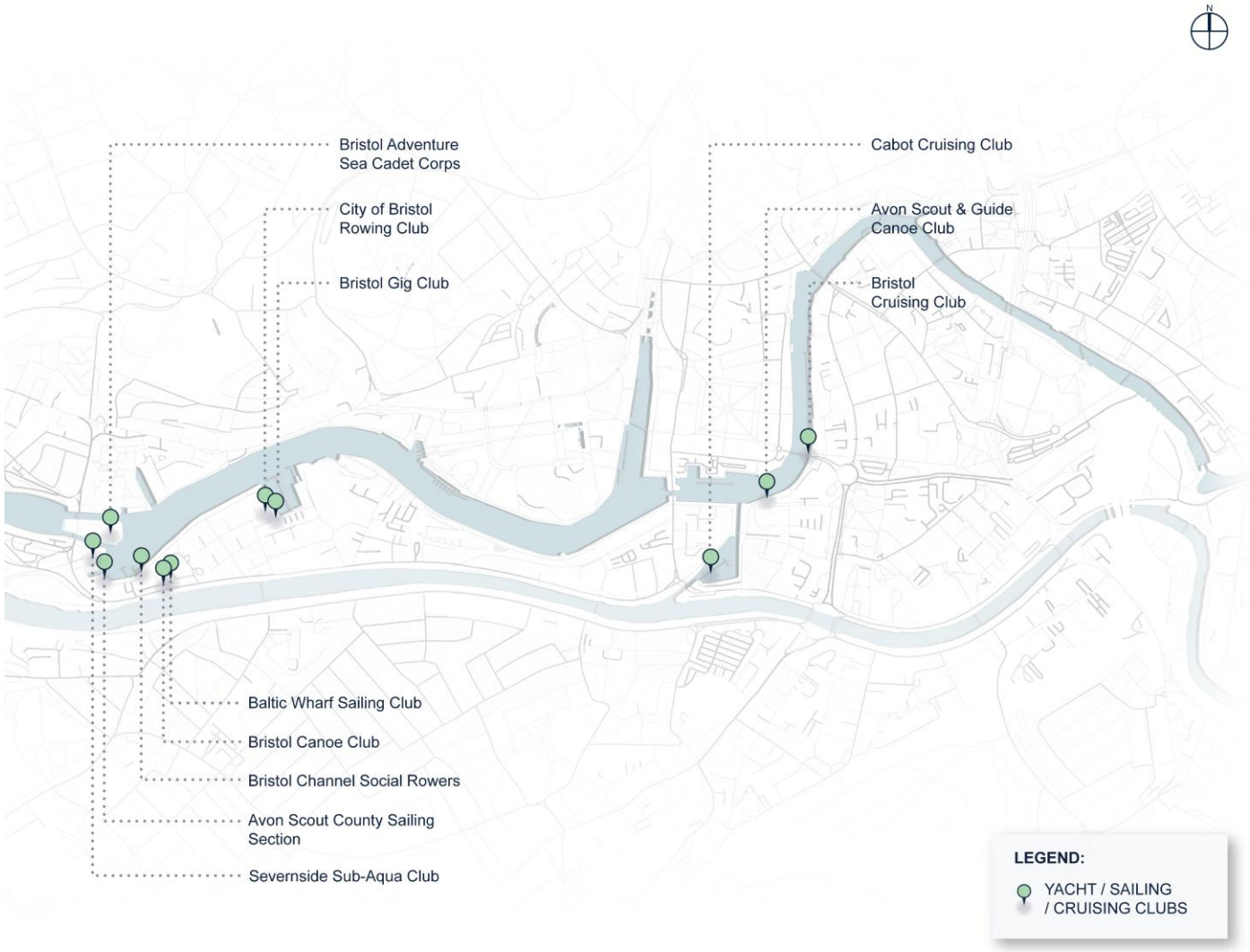
# Water Recreation Clubs

The adjacent image identifies all water recreation Clubs in Bristol Harbour with activities that can be largely categorised into:

- Boating activity (cruising and sailing Clubs)
- Rowing and canoeing activity
- Other Clubs including Bristol Adventure Sea Cadet Corps which is a youth Club offering a wide range of on water activities and the Severnside Sub Aqua Club which focuses on diving and snorkelling.

The following observations are noteworthy:

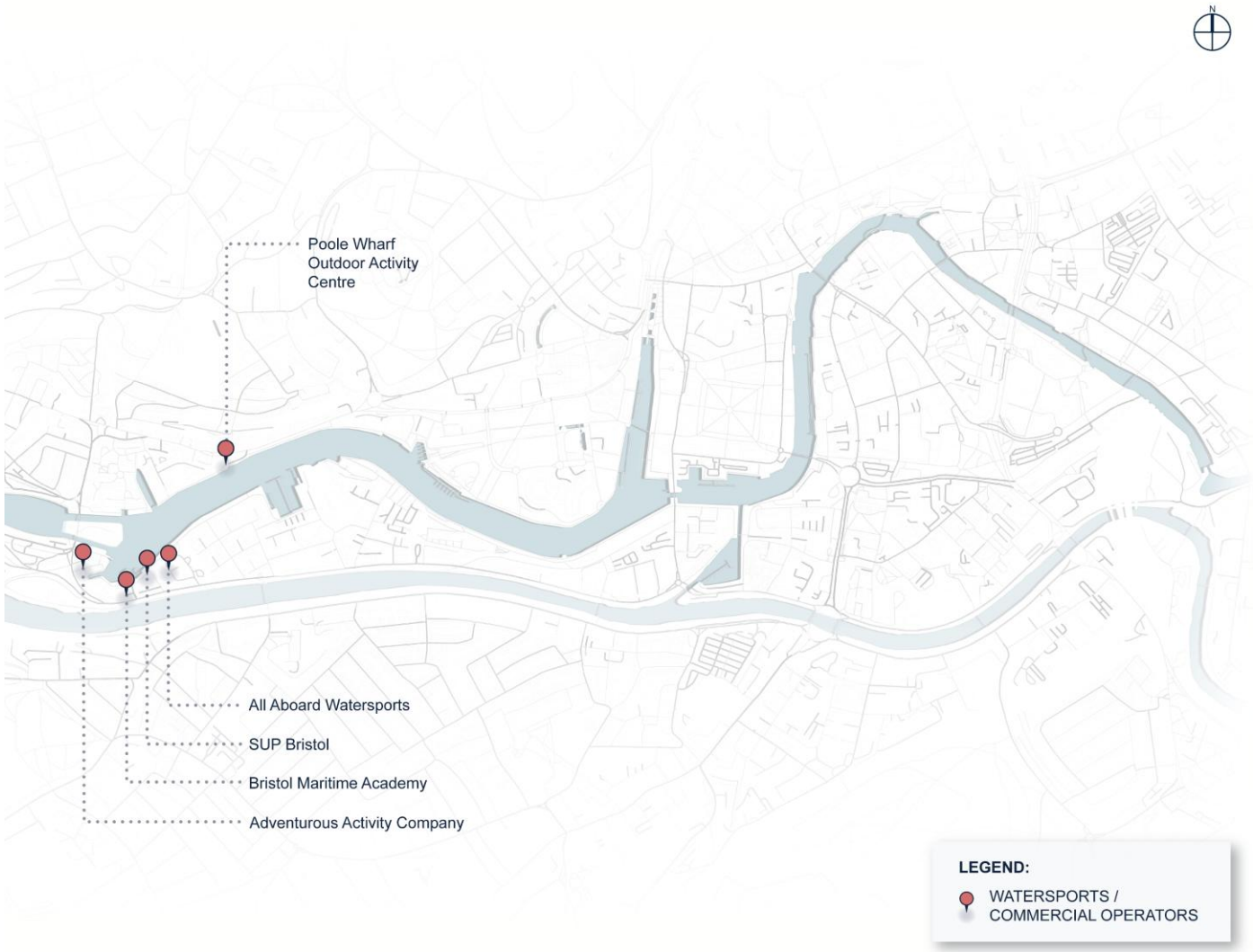
- There are 11 water recreation Clubs based in the Harbour
- These Clubs are generally concentrated in the west of the Harbour with landside connections to Baltic Wharf and Bristol Marina.
- Two prominent Clubs within Bristol Harbour are the Cabot Cruising Club at Bathurst Basin and the Bristol Cruising Club at Redcliffe Back, whose members own a combination of leisure and liveaboard vessels.
- A number of boating and rowing Clubs have landside facilities including Clubhouses and storage ashore, which are important aspects to support their operations.



# Watersports Commercial Operators

In addition to water recreational membership Clubs, there are a number of commercial operators offering a range of watersports activities including paddlesports, sailing, powerboating etc. These operators are identified on the adjacent plan, the following observations are of note:

- There are 5 watersports commercial operators in the Harbour.
- All operators are concentrated in the Baltic Wharf area, which also contains a large proportion of the Harbour's water recreation Clubs.
- Similarly to water recreation Clubs, all commercial operators have an operations building and storage areas for boats, equipment, etc which are essential for their day-to-day operation.
- In contrast to membership Clubs, commercial operators typically host larger numbers of visitors each day. The development of a rezoning plan and any associated facilities recommendations must account for this increased daily demand, particularly in relation to parking, access to facilities, and use of waterspace.
- The popularity of entry-level watersports, supported by water recreation Clubs, commercial operators and other facilities such as The Wave (local inland surf facility), provides a transitional pathway into boating. For example, owners of SUPs or rowing boats may become a future long-term marina customer. Encouraging these types of activities is desirable, as they help introduce new users to boating and support future growth.



# Customer Facilities

### Customer Facilities

There are 4 customer facilities throughout Bristol Harbour. These are generally of a mid to low quality with the exception of the facilities at Inlet Harbour which is a more recent installation.

There is a new floating facility at the Capricorn Quay pontoons which at time of writing are not yet open.

The facilities are largely concentrated in the central Harbour area.

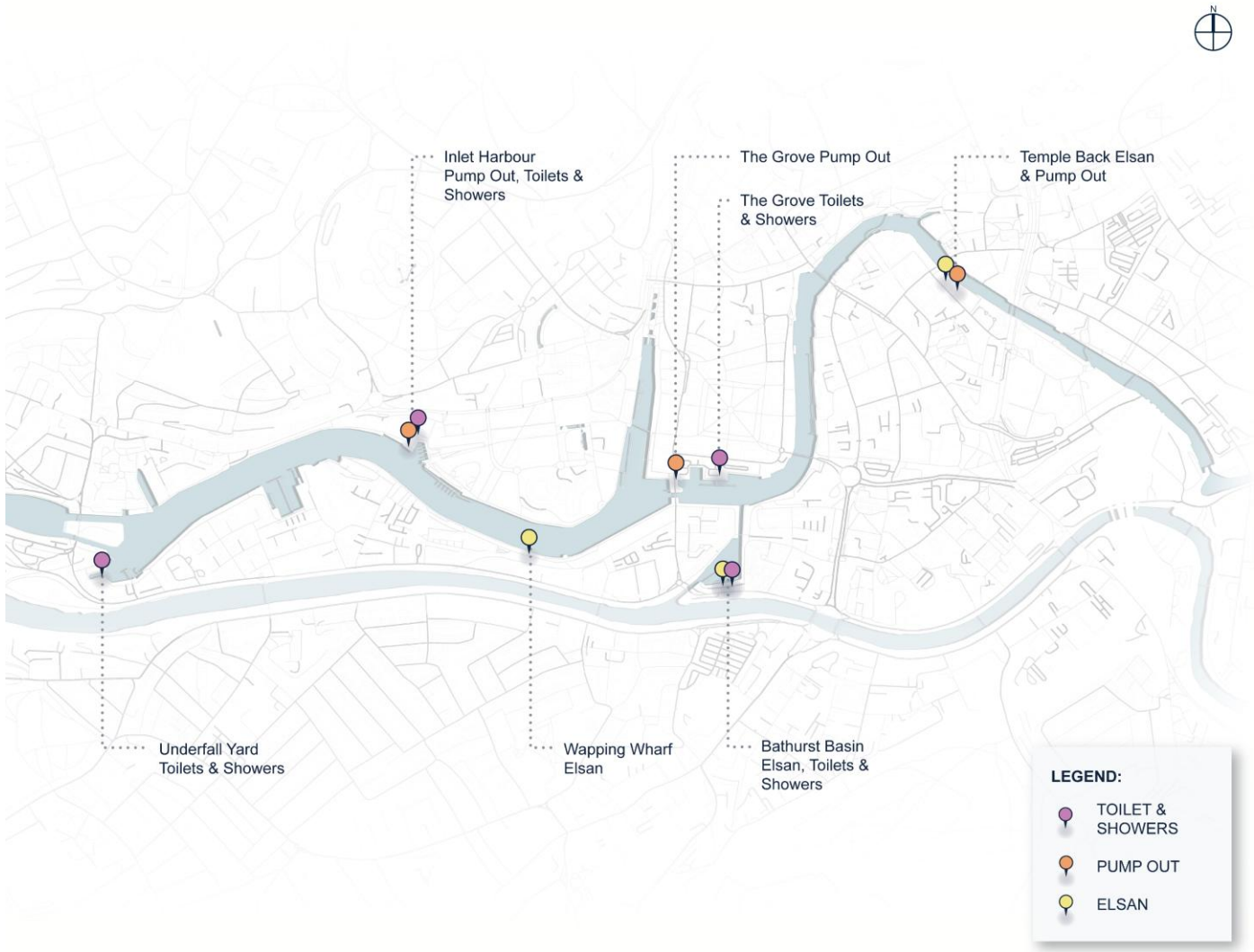
There is a clear requirement to introduce a greater number of facilities strategically throughout the Harbour.

### Wastewater Facilities

Wastewater pump out and elsan disposal facilities provide an environmentally safe way to remove black and grey water from a boats holding tank or cassette toilets.

There are 3 pump out and 2 elsan disposal points within the Harbour. It is of note that 2 of the pump out facilities are as of October 2025 out of service.

Consideration should be given to the increased demand on these facilities resulting from the proposals to expand the provision of moorings in the Harbour.



# Support Services

**Boatyards**

Vessels require access to a range of suitable landside support facilities which typically includes boatyards that provide repair, maintenance and refit services, lift out and storage ashore.

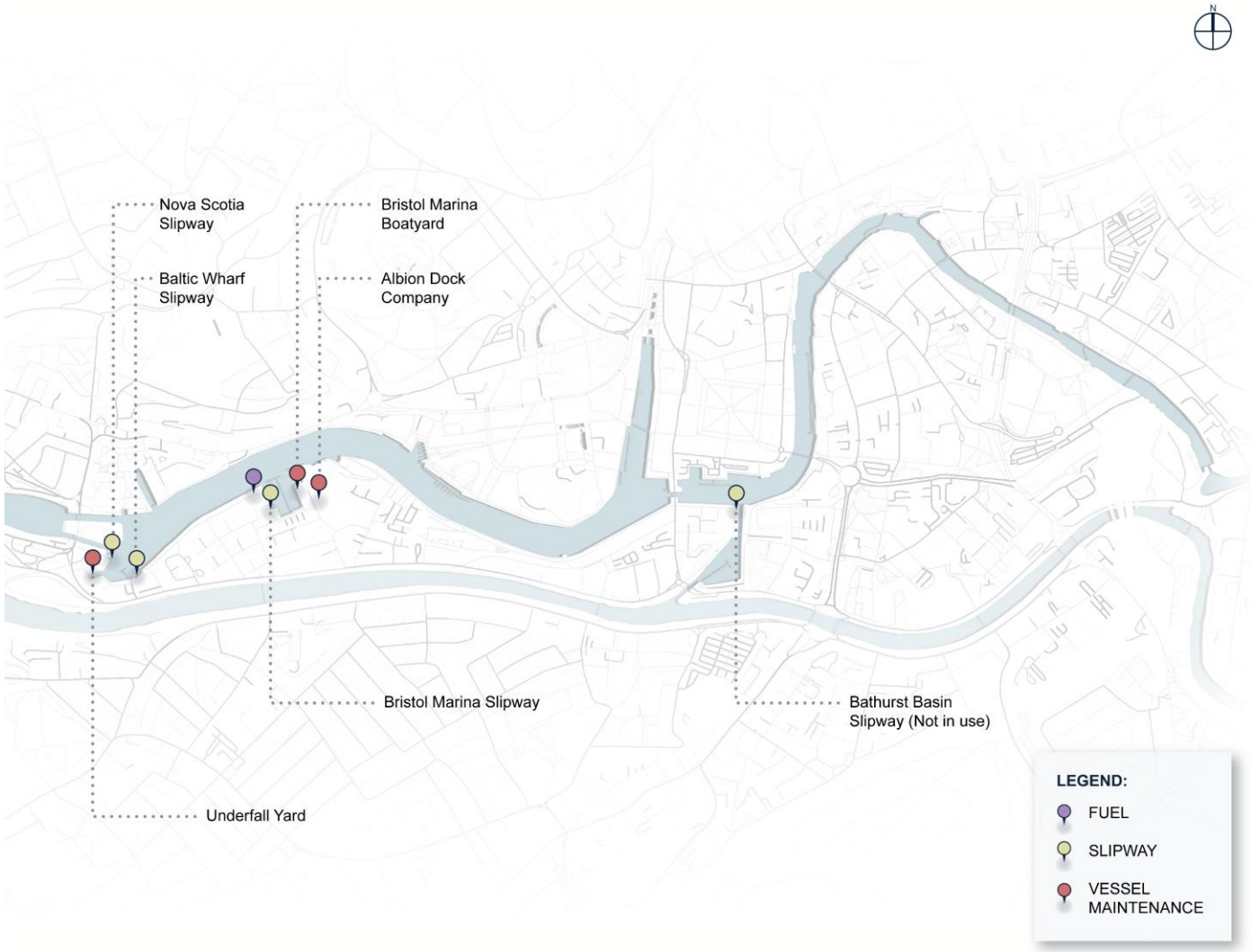
These facilities while serving an essential function for boaters, also serves to create animation on the waterfront and has a relationship with Bristol's shipbuilding heritage.

Within Bristol Harbour, there are 3 boatyards all located in the Baltic Wharf area. There are other service centres, boat builders and vessel maintenance providers however these are excluded from this assessment as they do not have their own lift out facilities and it is understood they use the facilities of the boatyards identified.

The number of boatyards is adequate for the existing market however it is understood Bristol Marina's boatyard is fully booked until Q2 of 2026 (as of October 2025).

Consideration should also be given to the increased demand on boatyard services resulting from the proposals to expand the provision of moorings in the Harbour.

As all boatyards in Bristol Harbour are privately owned commercial operations, the potential closure of any facility would require the Harbour to develop a contingency plan to ensure continuity of essential maintenance and repair services. Without these provisions there is a risk of vessels falling into disrepair and becoming a burden on the Harbour operations.



# Support Services

**Slipways**

Slipways provide access between the land and the water allowing vessels and manually propelled craft (rowing boats, canoes, paddleboards, etc) to be launched and recovered.

There are 3 slipways in Bristol Harbour all within the Baltic Wharf area linked to boatyard and watersports activities.

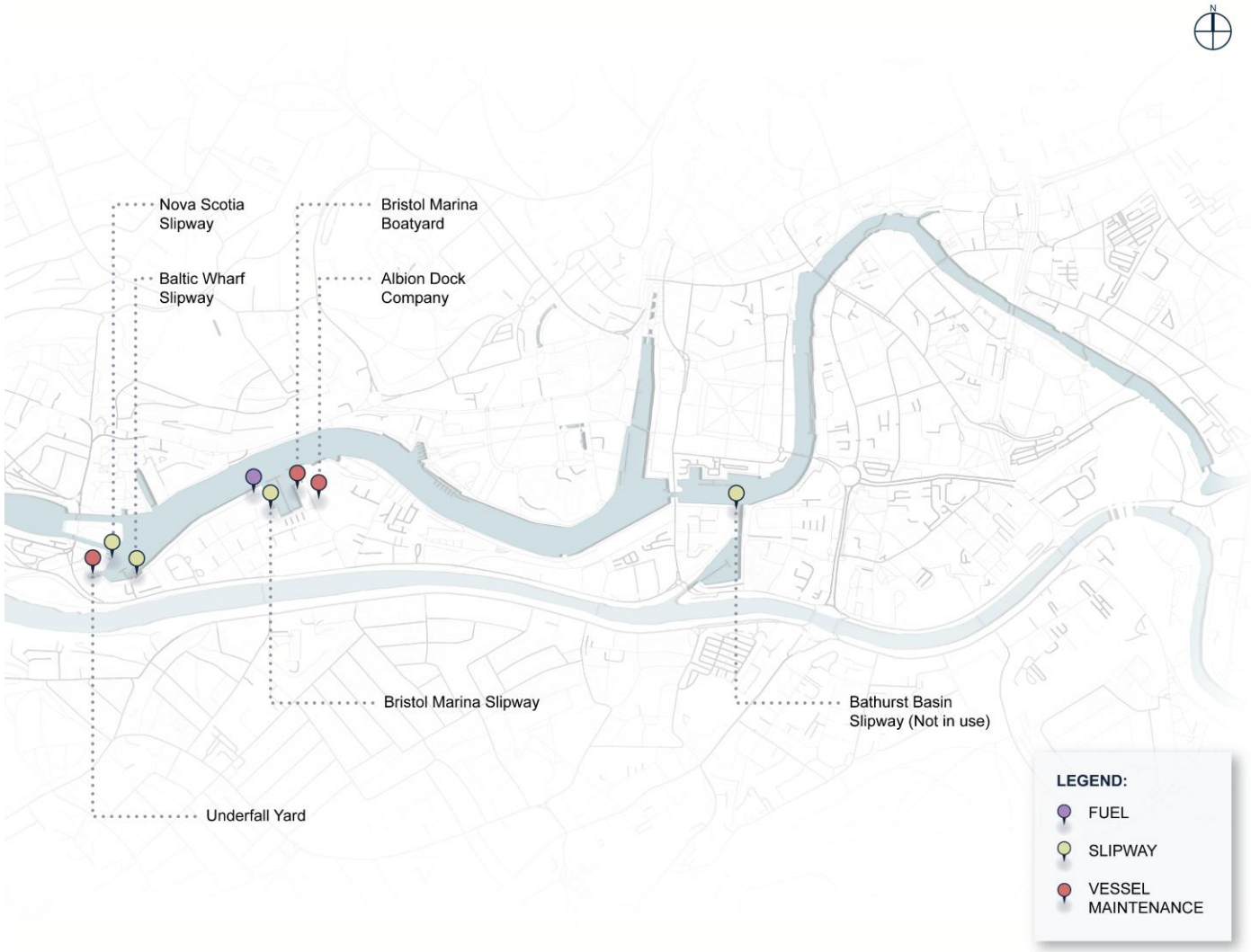
There is a slipway adjacent the entrance to Bathurst Basin but is not currently in operation. It is acknowledged this slipway has been identified for reactivation within the Place Shaping Strategy as part of the wider Bristol Watersports Network.

**Fuel**

There is one refuelling facility in Bristol Harbour and is understood to be sufficient to service the existing vessel activity.

The nearest fuel facilities outside the Harbour are Portishead Marina (coastal) and Bath Waterside Marina (inland). These facilities likely complement the facility in Bristol and support demand from mooring holders and visitors.

As with boatyards, consideration should be given to the increased demand for fuel with the expansion of moorings in the Harbour.



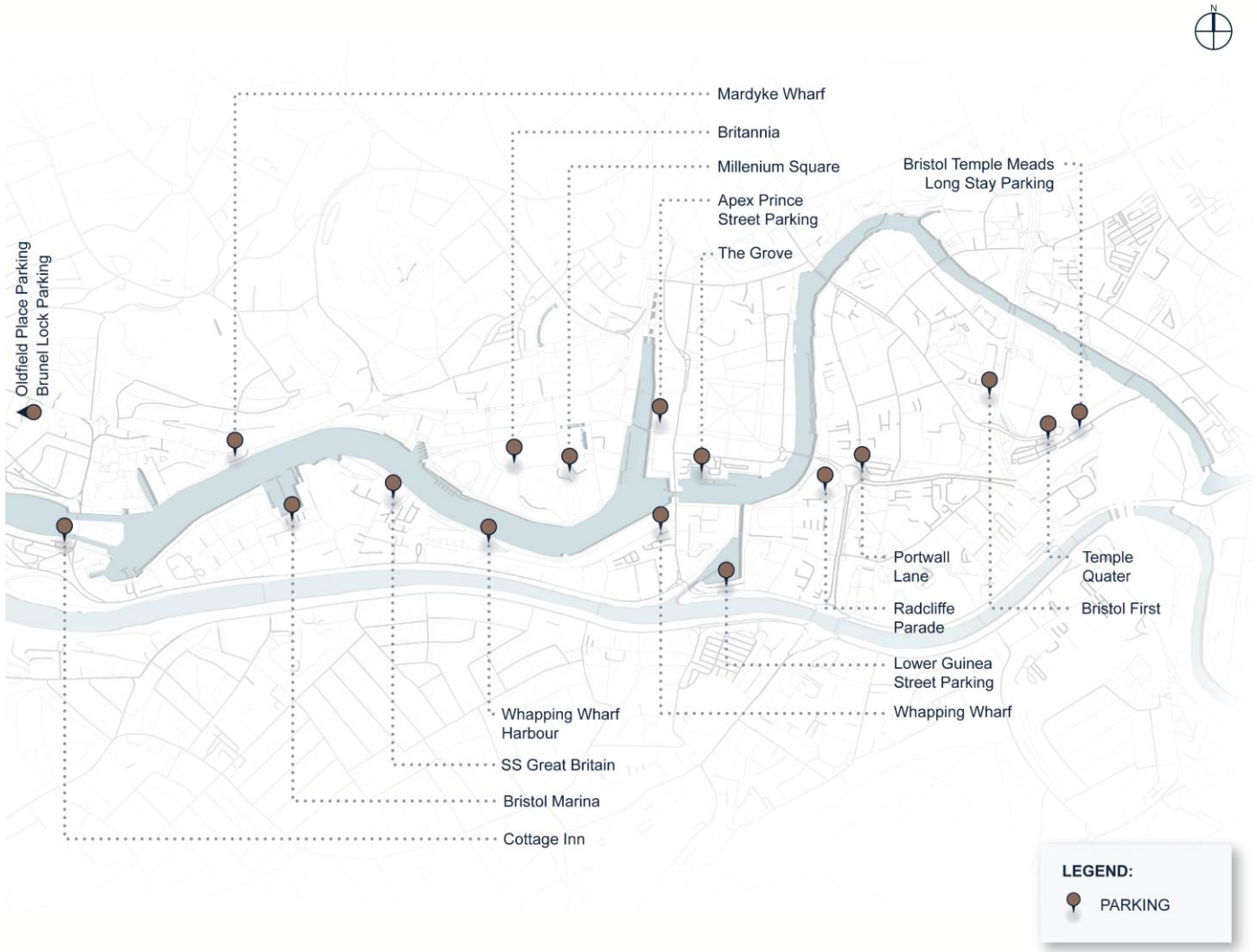
# Parking

The adjacent plan identifies all car parks in close proximity to the Harbour. There is generally a good distribution with all mooring areas within approximately 400m of a car park and often shorter distances.

While the plan suggests there is a wide range of car parks in the Bristol Harbour area, the BHA team has reported parking and access for mooring holders and other users of the Harbour is a challenge. Issues include limited availability of spaces near mooring areas and short drop off times of 30 minutes, which is insufficient to unload/load equipment.

BHA is open to introducing a Traffic Regulation Order (TRO) to help address the issue.

Consideration should be given to establishing dedicated mooring holder zones within existing car parks and introducing a greater range of short term drop off/pick up options.



# Facilities Summary

A summary of facilities available at each mooring location is provided on the next page.

While all facilities listed in the schedule can be accessed by any mooring holder and visitor, the intention of the summary schedule is to clearly identify their precise location in the Harbour highlighting which areas have convenient access to facilities. This will be a key reference for informing recommendations and next steps as the rezoning plan is developed.

**Assessment Notes & Methodology**

For reference, The Yacht Harbour Associate (TYHA) Code of Practice recommends that marina customer facilities should be situated within 300m from an access bridge. We have applied this 300m guideline to Bristol Harbour, so only mooring areas within 300m of a facilities block is noted as having convenient access in line with industry standards. While any mooring holder can use these facilities, it is not convenient for those further away.

Boatyards, storage ashore, fuel and slipways are not included in the schedule, as none are located directly at the mooring areas outlined in the Havenstar data provided by BHA.

Boatyards and associated services are concentrated in the west of the Harbour at Baltic Wharf and Bristol Marina. As with the customer facilities, while they are accessible to all mooring holders, those nearer to these facilities will find them more convenient than those moored further east.



# Bristol Harbour Existing Facilities Matrix

| | Water | Electric | Toilets & Showers | Laundry | Pump out | Elsan Disposal |
|---|---|---|---|---|---|---|
| Bathurst Basin (Pontoons & Wall) | Y | Y | Y | N | N | Y |
| The Grove (Pontoons & Wall) | Y | Y | Y | N | Y | N |
| Hannover Pontoons & Quay | Y^ | Y^ | Y | Y | Y | N |
| Merchants Quay | N | Y | N | N | N | N |
| The Mud Dock | N | Y | Y | N | N | N |
| Narrow Quay | Y | Y | Y | N | N | N |
| Old Junction Lock | N | N | Y | N | N | N |
| Princes Wharf | N | Y | N | N | N | N |
| Pooles Wharf | N | Y* | N | N | N | N |
| Marina North | Y | Y | N | N | N | N |
| Marina South | Y | Y | N | N | N | N |
| Redcliffe Wharf | N | N | N | N | N | N |
| Redcliffe Back | Y | Y | N | N | N | N |
| Temple Back (Pontoons & Wall) | Y | Y | N | N | Y | Y |
| Temple Quay | Y~ | Y~ | N | N | N | N |
| Wapping Wharf | N | Y | N | N | N | Y |
| Welsh Back | Y | Y | N | N | N | N |

^For the purposes of this assessment, Hannover Pontoons & Quay includes Inlet Harbour | ~Temple Quay South only | *Visiting vessels

## 3.4 Bristol Harbour Tariffs

This section reviews the pricing of Bristol Harbour and Bristol Marina by analysing the annual tariffs for leisure and liveaboard vessels and daily tariffs.

For the analysis of the annual leisure tariff, Bristol Harbour's pontoon tariff has been applied to ensure fair comparisons with Bristol Marina, which only offers pontoon berthing.

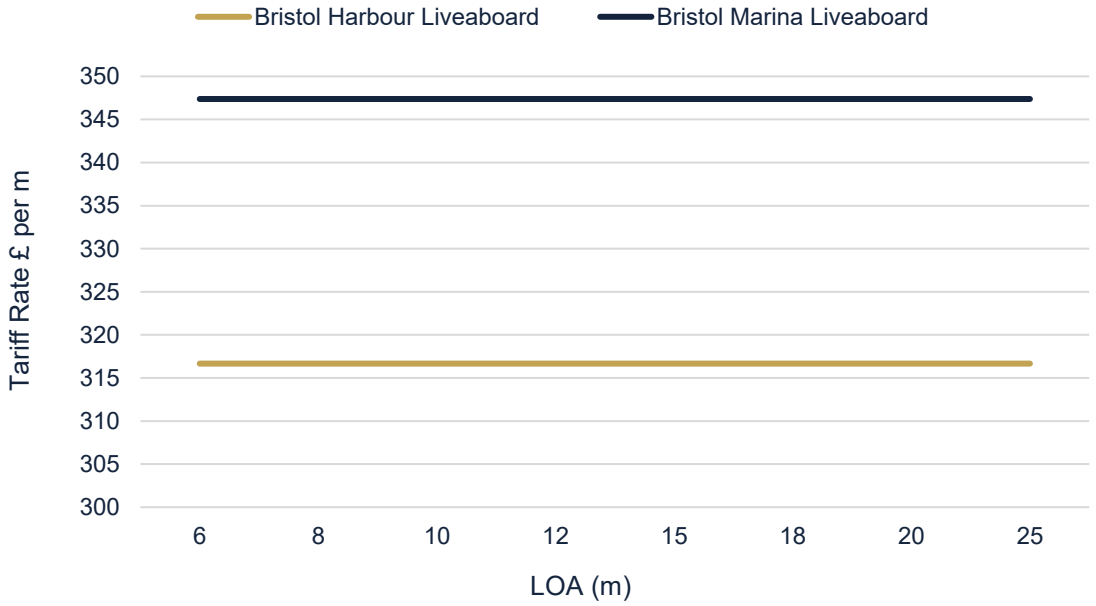
Tariff rate refers to price per metre charged for the length overall (LOA) of a vessel.

All prices exclude VAT and are presented in Sterling (£).

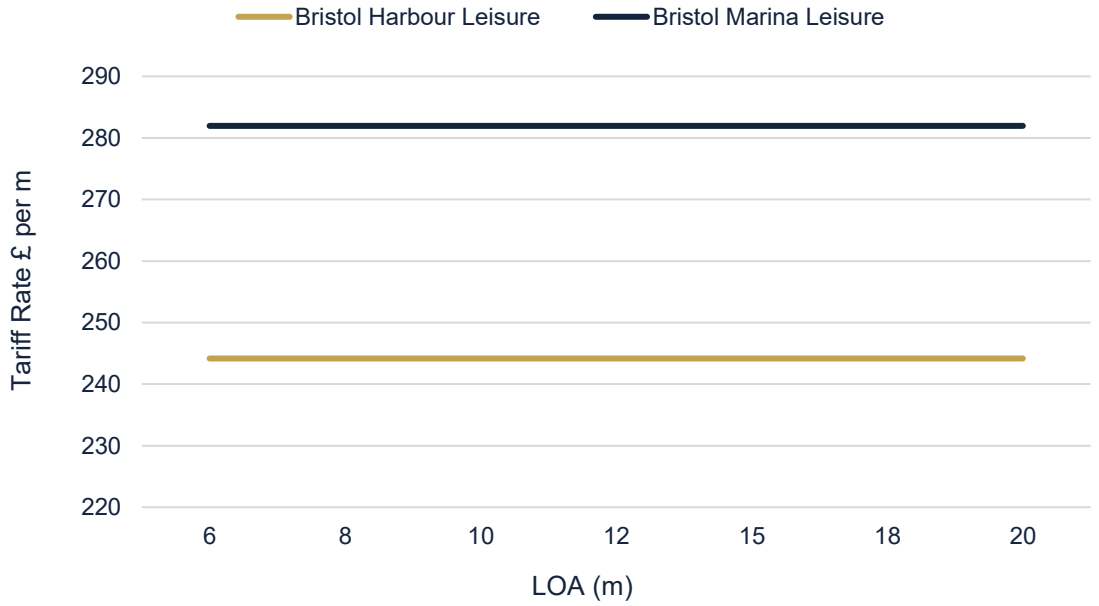
*Note: At the time of writing, the tariffs for Channel Yacht Sales and Pooles Wharf Marina are unavailable.*

# Bristol Harbour Annual Tariffs

## Annual Liveaboard




## Annual Leisure

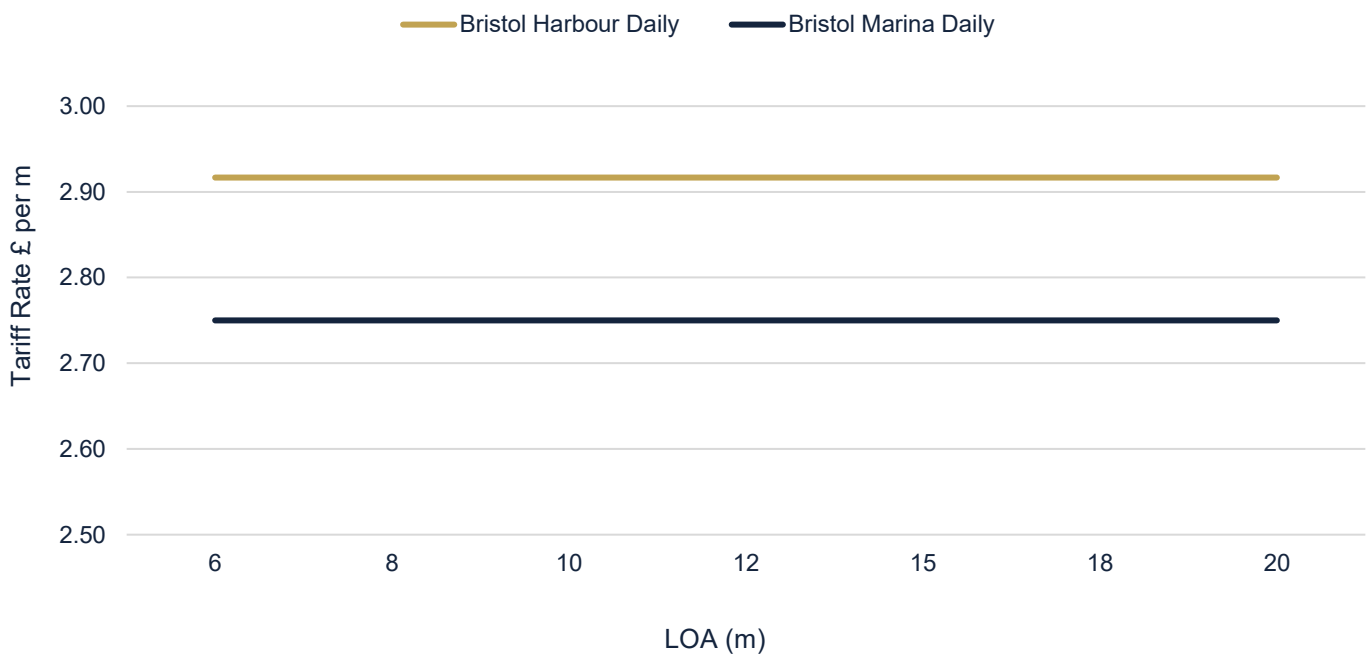



Comparison with Bristol Marina's tariffs for both liveaboard and leisure vessels suggests that Bristol Harbour is currently priced below market levels.

It is acknowledged that Bristol Marina offers walk-ashore pontoons, secure moorings and convenient access to vessel maintenance facilities and services. As these facilities are inconsistent across all Bristol Harbour moorings, this highlights the need for a broader and fairer range of tariff categories that better reflect the varying facilities available at each mooring location.

Both operators apply linear tariffs which do not account for the additional waterspace, infrastructure and services that a vessel requires as it increases in length, beam (width) and draft (distance from the waterline to the lowest point of the hull). Marinas in mature markets such as the Solent (south coast), typically operate a stepped tariff that more accurately reflects the three-dimensional nature of vessels and the corresponding demand they place on facilities and resources.

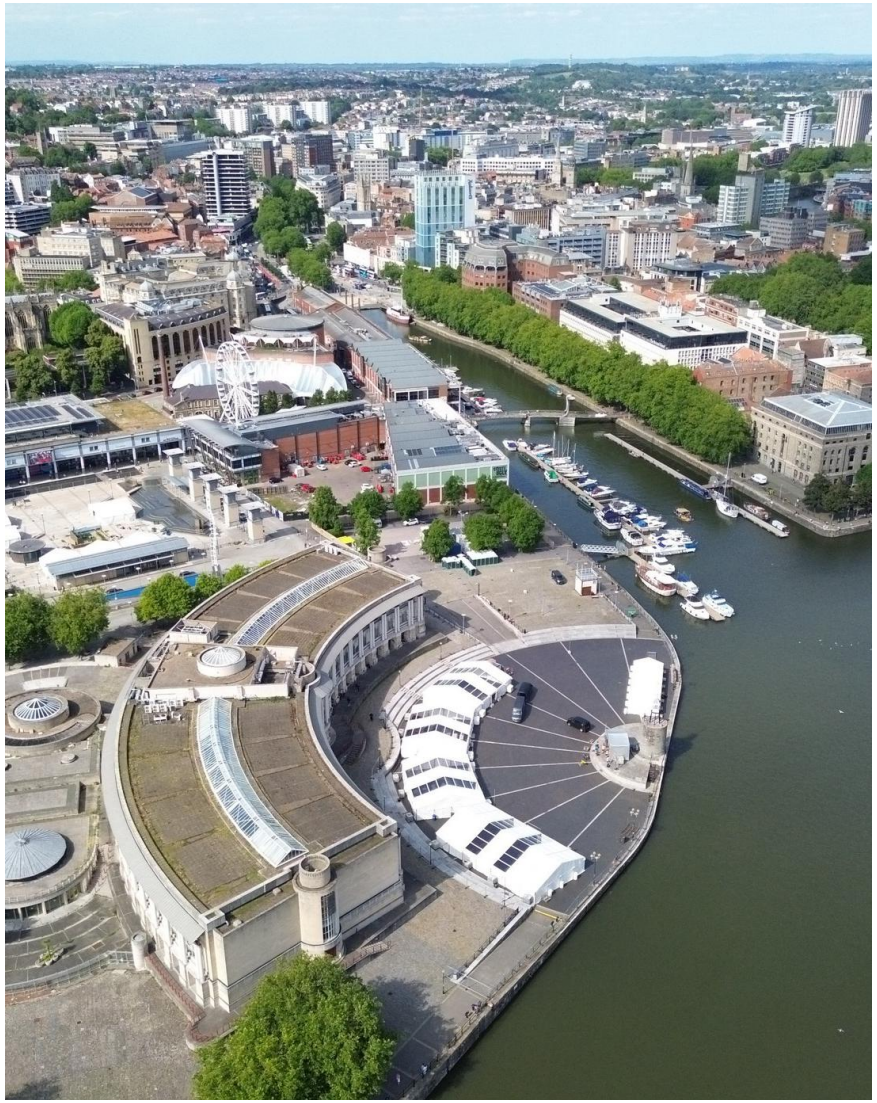
# Bristol Harbour Daily Tariffs




The daily visitor charges at Bristol Harbour and Bristol Marina are broadly comparable in terms of price.

Notably, Bristol Marina's daily rate includes City Docks navigation licence and complimentary electricity, making their overall package more attractive to customers.

As with the annual tariffs, the daily tariff also applies a linear tariff which does not account for larger vessels occupying a greater amount of waterspace and infrastructure.





# Regional Market: Bristol Channel & Kennet and Avon Canal

## 3.5 Market Overview

To provide a broader market perspective, this section defines the regional market area which has a direct influence on Bristol Harbour. The assessment will provide context to the scale of the market, regional demand and pricing.

The section identifies all formal leisure marinas within the market along with the range of facilities and services available at each marina. This helps establish where visitor activity may arrive from and highlights opportunities for targeted marketing. It also provides an understanding of the facilities that are typically offered at modern marinas, helping to inform recommendations for Bristol Harbour.

# Regional Market

As Bristol Harbour can be accessed from the Bristol Channel and the Kennet and Avon Canal, the assessment of the regional market encompasses two distinct areas. Due to the differing nature of boating activity in these areas, the following boundaries have been defined:

**Bristol Channel (Coastal):** 50Nm radius from Cumberland Basin and is based on the typical distance a vessel can travel in a day from Bristol Harbour.

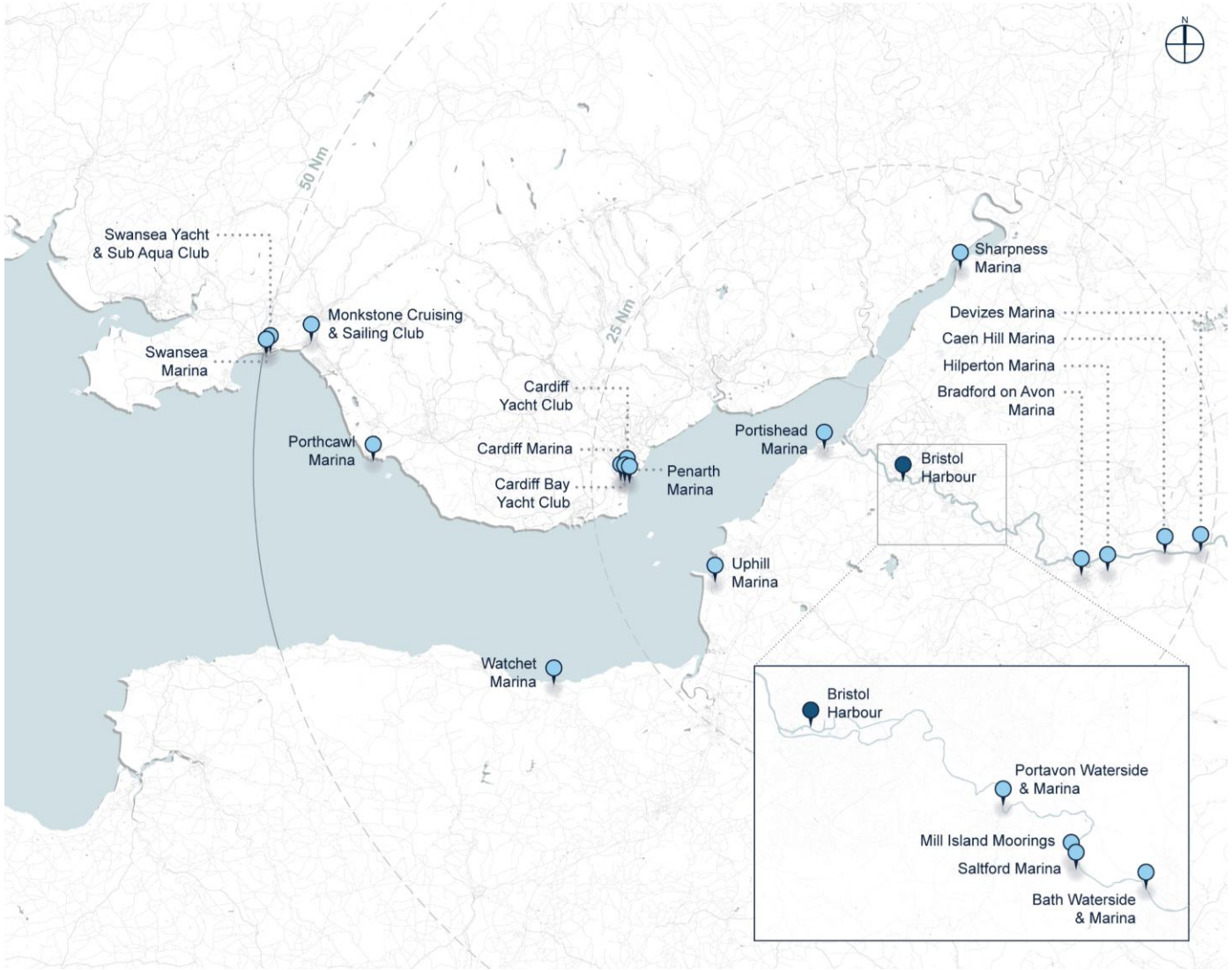
**Kennet and Avon Canal (Inland):** 25Nm radius from Netham Lock, reflecting practical cruising distances for inland vessels, particularly narrowboats that cruise at slower speeds.

Given the markedly different characteristics of these markets, with one being a coastal area covering a larger region, and the other an inland waterway with more limited activity, they are discussed separately throughout this section of the report. This approach ensures the nuances between the two are maintained and recognises that the types of vessels and their requirements differ subtly between the two markets.

There are a total of 20 leisure marinas within the regional market:

- Coastal: 12 Marinas
- Inland: 8 Marinas

- Coastal marinas are largely concentrated in Wales and in recognised boating hubs (Cardiff, Swansea), with only a modest number on the southern coast of the Bristol Channel.
- Inland, there are a modest number of marinas which are more sparsely distributed throughout the canal network albeit there is a greater concentration between Saltford and Bath.



# Facilities

A desk-based assessment has been undertaken to establish the at berth and landside services & facilities provided at each marina facility in the regional market. The assessment of the coastal and inland regions are presented as matrices and discussed on the following pages.

Understanding the facilities available across the regional market, and the standards that visitors are accustomed to elsewhere, is essential for informing recommendations on improvements to existing facilities at Bristol Harbour, the introduction of new facilities, and future planning and capital expenditure.



# Regional Facilities Matrix: Coastal

| | Year Built | Max LOA | Essential Pontoon Services* | Boatyard | Crane (Tons) | Travellift (Tons) | Storage Ashore | Slipway | Fuel | Pump out | Parking | Laundry | CCTV / Security | Yacht Club | Watersports Activities | Accreditation |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Swansea Marina | 1982 | 24 | Y | Y | Masts | 20 | Y | N | Y | Y | Y | Y | Y | N | Y | Blue Flag |
| Swansea Yacht & Sub Aqua Club | Pre-2000 | 18 | Y | Y | N | Y | Y | Y | N | N | Y | N | Y | Y | Y | N |
| Monkestone Cruising & Sailing Club | Pre-2000 | 12 | Y | Y | N | 12 | Y | Y | N | N | N | N | N | N | N | N |
| Porthcawl Marina | Pre-2000 | 18 | Y | N | 10 | N | N | Y | N | Chemical WC disposal | Y | N | Y | N | N | Blue Flag |
| Cardiff Marina | Pre-2000 | 25 | Y | Y | Static power crane | 80T Sea lift | Y | N | Y | N | Y | Y | Y | N | N | ISO14001 |
| Cardiff Bay Yacht Club | 1932 | 15 | Y | Y | N | Y | Y | Y | N | N | Y | N | Y | Y | Y | ISO14001 |
| Cardiff Yacht Club | Between '01-'06 | 12 | Y | Y | N | Y | Y | Y | N | N | Y | N | Y | Y | Y | ISO14001 |
| Penarth Marina | 1987 | 22 | Y | Y | Masts | 20 | Y | N | Y | Y | Y | Y | Y | N | Y | 5 Gold Anchor & Blue Flag |
| Sharpness Marina | 1971 | 21 | Only water | N | N | N | Y | N | N | N | Y | Y | Y | N | N | N |
| Portishead Marina | 2001 | 25 | Y | Y | N | 35 | Y | N | Y | Y | Y | Y | Y | N | Y | 5 Gold Anchor, ICOMIA Clean Marina Award |
| Uphill Marina | Pre-2000 | 12.5 | WCs & Showers | Y | N | 15 | Y | Y | N | N | Y | N | Y | N | Y | N |
| Watchet Marina | 2001 | 12 | Y | Y | N | N | Y | Y | Y | Y | Y | Y | Y | N | N | N |

N = Absence or unable to confirm presence of facility | *Essential Pontoon Services includes water, electric, customer facilities and Wi-Fi

# Regional Facilities Matrix: Inland

| | Year Built | Max LOA | Essential Pontoon Services* | Boatyard | Crane (Tons) | Travellift (Tons) | Storage Ashore | Slipway | Fuel | Pump out | Parking | Laundry | CCTV / Security | Yacht Club | Watersports Activities | Accreditation |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Portavon Waterside & Marina | Pre-2000 | 20 | Y | N | N | N | N | Y | N | Y & Elsan | Y | Y | Y | N | N | 2 Gold Anchor |
| Saltford Marina | Pre-2000 | 21 | Y | N | N | N | N | N | N | Y | Y | Y | Y | N | N | N |
| Bath Waterside & Marina | Pre-2000 | 20 | Y | N | N | N | N | Y | Y | Y | Y | Y | Y | N | N | N |
| Mill Island Moorings | Pre-2000 | 15 | Y | N | N | N | N | N | N | Y | N | N | Y | N | N | N |
| Bradford-on-Avon Marina | 1982 | 18 | Y | N | N | N | N | Y | N | Y | Y | N | Y | N | N | N |
| Hilperton Marina | 1986 | 21 | Y | Y | 45 | N | Y | Y | Y | Y & Elsan | Y | N | N | N | N | N |
| Caen Hill Marina | 2012 | 21 | Y | N | N | N | N | N | Y | Y & Elsan | Y | Y | Y | N | N | 4 Gold Anchor |
| Devizes Marina | 1995 | 21 | Y | N | N | N | N | Y | N | Y & Elsan | Y | N | Y | N | N | N |

N = Absence or unable to confirm presence of facility | *Essential Pontoon Services includes water, electric, customer facilities and Wi-Fi




# Facilities Summary

The following key observations can be made of the regional facilities:

- There is substantial variation in the provision of services across the regional market, particularly between coastal and inland marinas.
- Swansea Marina, Penarth Marina, and Cardiff Marina each have comprehensive infrastructure (boatyards, technical services and shore amenities) supporting a range of vessel types and sizes, serving as useful benchmarks for Bristol Harbour.
- While inland marinas provide useful context, they generally offer more basic facilities catering to smaller craft and as such are less applicable to Bristol Harbour.
- Almost all marinas provide essential pontoon services, parking, laundry, and CCTV/security. However, there are notable differences in the provision of more specialised infrastructure between the two areas.
- Coastal marinas generally offer full-service packages with berthing, boatyard facilities, lift out, and storage ashore.
- Notably, only one inland marina provides boatyard services, which are modest in scale and tailored to the less frequent maintenance needs of inland vessels compared with coastal vessels.
- All inland marinas have pump out available, whereas this is less widespread across coastal marinas. This reflects the differing nature of boating and essential facilities in each market.
- Fuelling services are generally concentrated at larger marinas in both coastal and inland area. The closest fuel facilities to Bristol Harbour are Bath Waterside and Portishead Marina. It is likely these facilities complement the fuel station in the Harbour.
- Industry accreditation (5 Gold Anchor and Blue Flag) is limited to a select few marinas, usually those with more comprehensive facilities. Achieving these accreditations may help further promote Bristol Harbour within the industry.

## 3.6 Berth Supply & Vessel Demand

Analysis of marina layouts using satellite imagery has been conducted to establish the total number of berths and vessels located within the regional market.

From this assessment, we are able to establish the berth and vessel mix profiles (distribution of berth and vessel sizes) for general marine leisure activity (up to 26m) in the regional market.

In addition to establishing the berth and vessel profile of the regional market, the data also allows for the analysis of marina occupancy and level of demand for berthing in the region

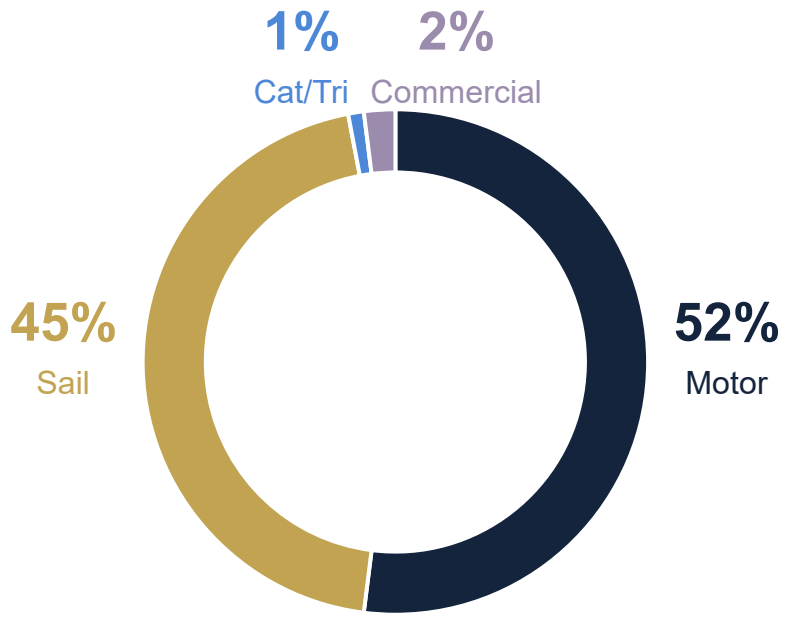
# Regional Market Vessel Type: Coastal

### Market Observations

Vessels in the regional marina market are generally evenly split between motor and sailing vessels with a slight preference towards motor vessels. This reflects the challenging tidal conditions of the Bristol Channel which steers many boat owners toward motor vessels which are better equipped to manage the strong currents and varying tidal flows.

There is a very modest number of commercial vessels (ferries, fishing vessels, etc) and negligible multihull presence. The strong tides and variable winds along the South Wales coastline, make traditional vessel types more practical than multihull design.

The highest presence of sailing vessels within marinas are observed in Swansea and Cardiff. Marinas here are larger and well-equipped providing access to a full range of services. Their sheltered locations and easy access via manned locks to and from the Bristol Channel make them popular for sailing vessels.



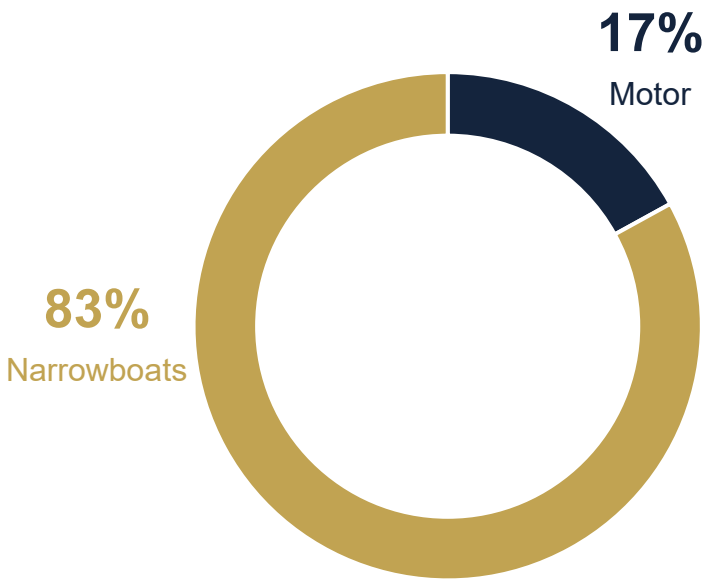

| Vessel Type | No. Of Vessels | Ratio |
|---|---|---|
| Motor Vessels: | 1,127 | 52% |
| Sailing Vessels: | 956 | 45% |
| Commercial Vessels: | 44 | 2% |
| Cat/Tri Vessels: | 15 | 1% |
| **Overall Total:** | **2,142** | **100%** |

# Regional Market Vessel Type: Inland

### Market Observations

The following observations of the inland vessel market are as follows:

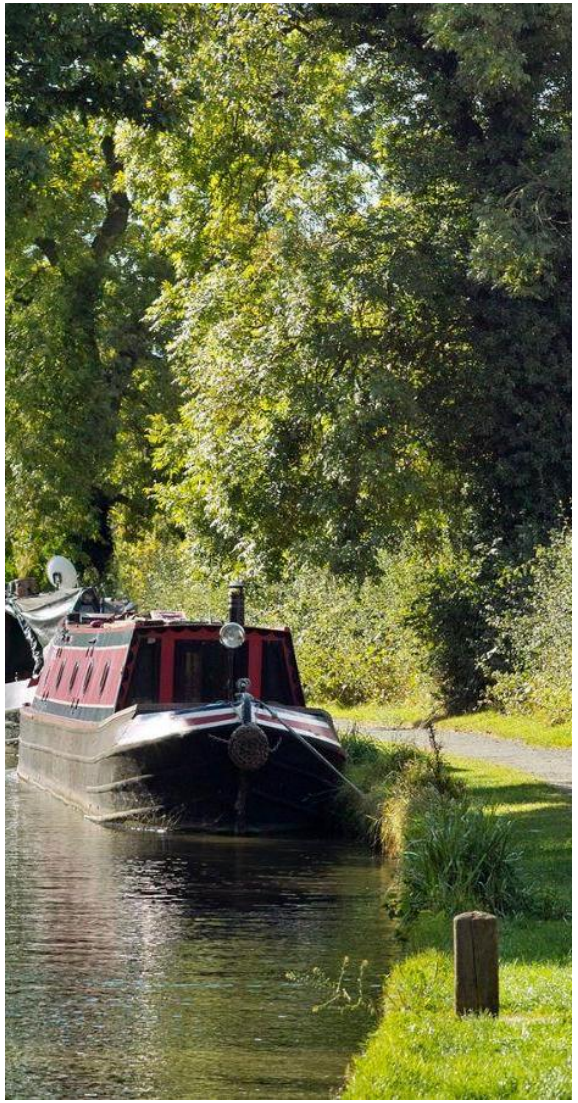
- Vessel activity is limited to two overarching categories of vessels (canal boats & motor vessels) which reflects the natural restrictions of inland waterways including canal widths, lock dimensions and vessel draft and air draft.
- Vessel activity is heavily weighted towards canal boats (narrowboats, widebeam vessels and barges) with approximately 80% of all activity concentrated in this category.
- The results of this assessment would confirm the assumption that most visitor activity to Bristol Harbour from the River (as noted on Page 36) consists primarily of canal boats. This helps inform the development of rezoning plans and future capital expenditure, noting that visitor moorings and associated facilities should be tailored to this vessel type.




| Vessel Type | No. Of Vessels | Ratio |
|---|---|---|
| Motor Vessels: | 97 | 17% |
| Narrowboats/Widebeam/Barge: | 476 | 83% |
| **Overall Total:** | **573** | **100%** |







# Regional Market Berth & Vessel Mix

A desktop analysis of satellite imagery has been conducted to establish the total number of berths and vessels in the coastal and inland markets.

From this assessment we can establish the berth mix and vessel mix profiles within the market (i.e. the distribution of berth and vessel sizes). The outputs of this section are measured and defined as follows:

## Berth Mix

- Refers to the total number of berths in the regional market and has been assessed by applying industry design standards to each marina layout, taking into consideration fairway widths, turning circles and berth lengths to establish the berth mix at each marina.

## Vessel Mix

- While berth mix data provides an indication of berth supply, analysis of the vessel mix within each marina allows for more detailed analysis of the relationship between berth supply and vessel demand.
- Vessel mix refers to the total number of vessels berthed in each marina facility to understand the scale and profile of the vessel market that currently exists.
- The assessment represent a ‘snapshot’ of activity & occupancy levels at each marina.

# Regional Market Berth & Vessel Mix: Coastal

The berth and vessel mix for the coastal regional market is provided in the below schedule.

| LOA | Berths | Ratio | Vessels | Ratio |
|---|---|---|---|---|
| ≤8.00 | 829 | 30% | 825 | 38% |
| 8.01-10.00 | 1,007 | 36% | 697 | 32% |
| 10.01-12.00 | 619 | 22% | 376 | 18% |
| 12.01-13.50 | 150 | 5% | 118 | 6% |
| 13.51-15.00 | 32 | 1% | 55 | 3% |
| 15.01-18.00 | 74 | 3% | 45 | 2% |
| 18.01-20.00 | 26 | 1% | 16 | 1% |
| 20.01-24.00 | 27 | 1% | 10 | <1% |
| 24.01-26.00 | 3 | <1% | 0 | 0% |
| **Total** | **2,767** | **100%** | **2,142** | **100%** |



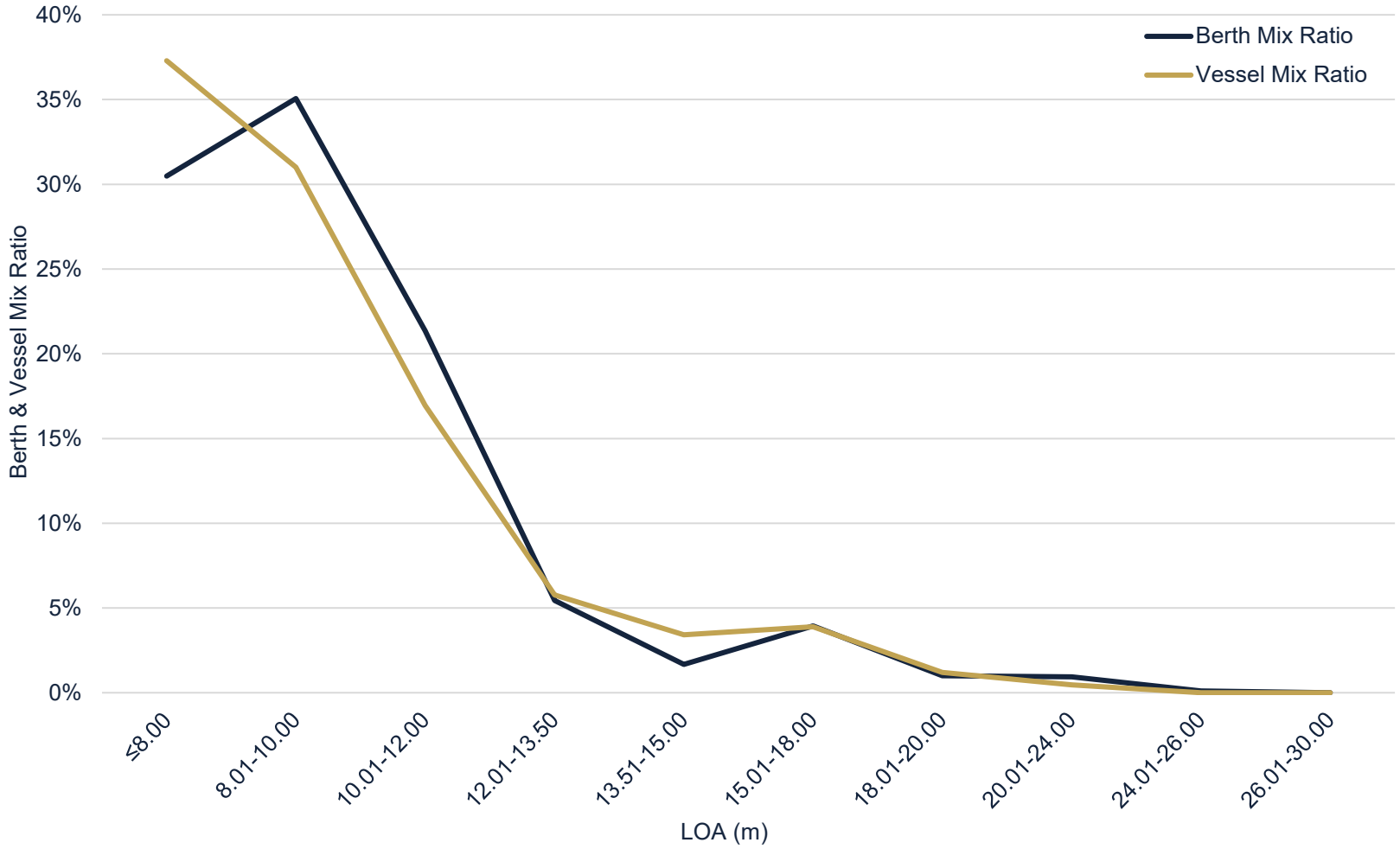
# Regional Market Berth & Vessel Mix: Inland

The berth and vessel mix for the coastal regional market is provided in the below schedule.

| LOA | Berths | Ratio | Vessels | Ratio |
|---|---|---|---|---|
| ≤8.00 | 97 | 13% | 69 | 12% |
| 8.01-10.00 | 46 | 6% | 60 | 10% |
| 10.01-12.00 | 63 | 9% | 56 | 10% |
| 12.01-13.50 | 55 | 8% | 53 | 9% |
| 13.51-15.00 | 135 | 19% | 74 | 13% |
| 15.01-18.00 | 254 | 35% | 177 | 31% |
| 18.01-20.00 | 52 | 7% | 61 | 11% |
| 20.01-24.00 | 20 | 3% | 23 | 4% |
| 24.01-26.00 | 0 | 0% | 0 | 0% |
| **Total** | **722** | **100%** | **573** | **100%** |



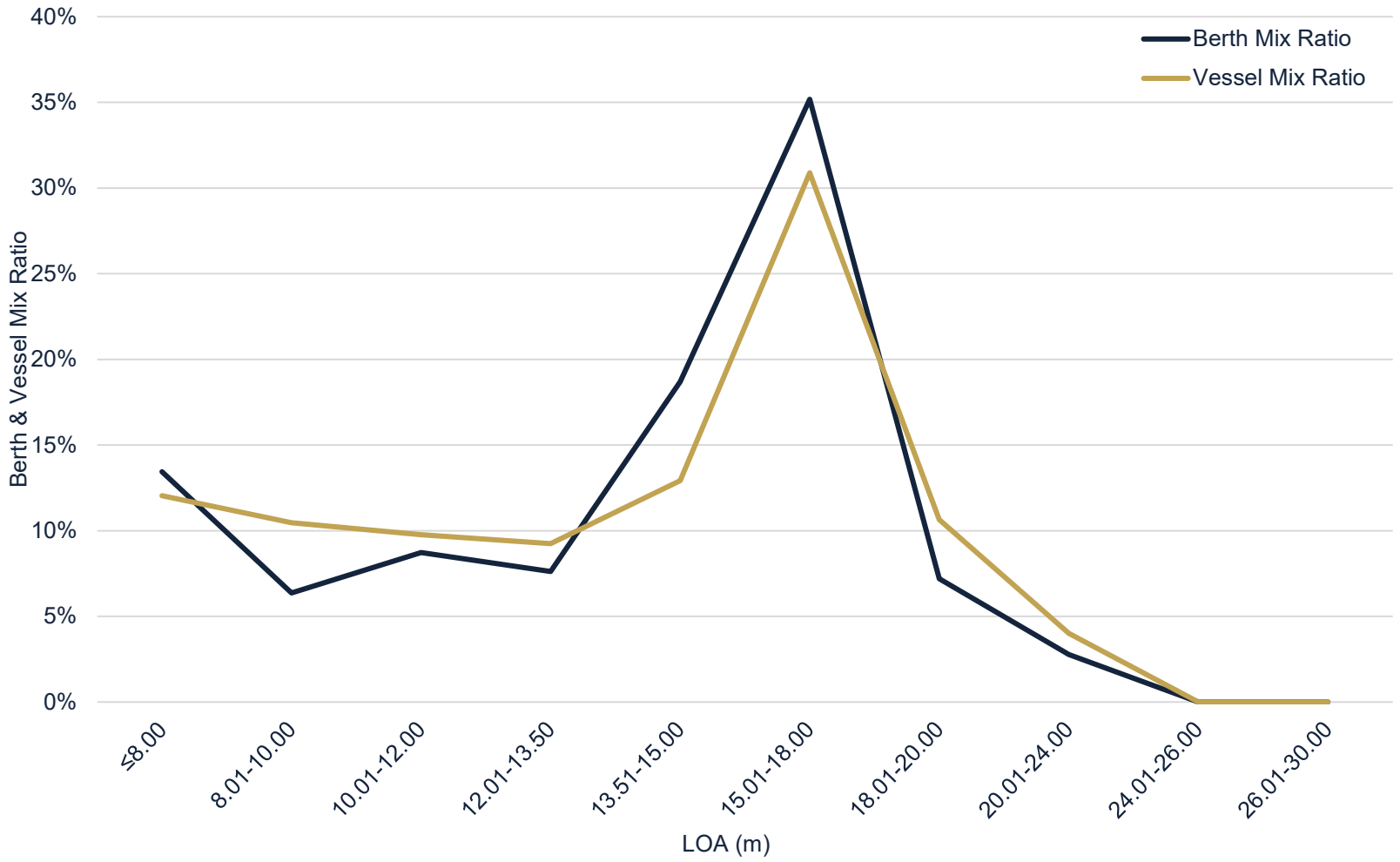
# Regional Market Observations: Coastal




**Market Observations**

- There are a total of approximately 2,800 berths and 2,100 vessels in the regional market coastal marinas.
- The market is characterised by day boating (10m and below) and small cruising vessels (10.01 – 12.00m) with around 90% of all berths and vessel activity falling within this size range.
- This concentration of activity amongst smaller vessels and the significant reduction in activity of larger vessels reflects the challenging tidal conditions of the Bristol Channel.
- The oversupply of berths means marinas are under pressure to differentiate themselves and provide more value, ensuring facilities are well-matched to the main vessel types, smaller craft and day boats.

# Regional Market Observations: Inland




**Market Observations**

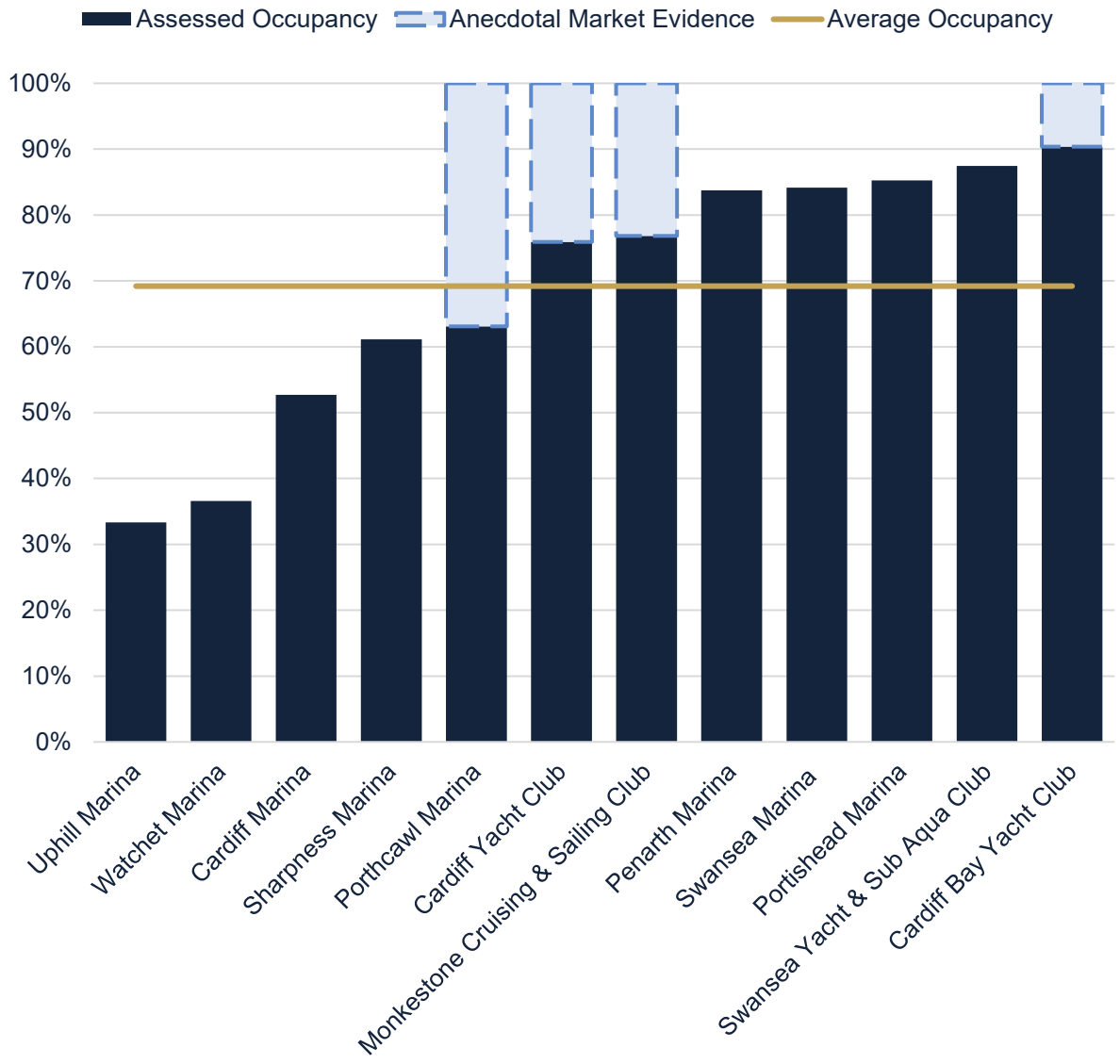
- The inland regional marina market has approximately 720 berths and 570 vessels.
- The largest share of both berths and vessels is concentrated in the 15.01–18.00m range. This reflects the dominance of canal boats (narrow, widebeam) and associated type of boating in the market.
- There is modest demand for berthing 13.50m and below consistent with smaller motor and canalboat activity.
- There is very limited activity 18.01m & above owing to the constraints of the inland waterway infrastructure.

# Regional Market Occupancy: Coastal

Occupancy data is based on berth and vessel counts via satellite imagery; however, actual occupancy may be higher due to waiting lists and operational factors not visible from this data source.

The adjacent figure presents the occupancy of each marina in the regional market. It is important to note that the **dark blue bar** represents marina occupancy based on MPL's assessment of satellite imagery. The **dotted light blue bar** presents the known occupancy at a select number of marinas which is informed by MPL's knowledge of the regional market and data shared by marina operators. The following observations are of note:

- The average regional occupancy is approx. 70%, indicating a good level of demand.
- Anecdotal evidence from industry contacts suggest a number of marinas (noted in light blue) are fully occupied, demonstrating the demand in the region.
- Uphill Marina and Watchet Marina are outliers in the regional market and have been experiencing a number of challenges discussed below, resulting in significantly lower occupancy than other marinas in the market.
  - **Uphill Marina** has low occupancy due to tidal limits. Located in the River Axe estuary, it is accessible only for a short period each tide. The shallow channel restricts larger vessels, and environmental protections restrict dredging or expansion.
  - **Watchet Marina** also contends with significant silt accumulation, which in combination with operational challenges, has contributed to low occupancy. Since autumn 2024, a new operator has introduced capital investment to improve infrastructure and grow berth occupancy.
- Marinas with the highest occupancy levels are typically those offering comprehensive, full-service facilities. These marinas provide not only berthing but also on-site boatyards and associated marine services, delivering a complete package for boat owners.

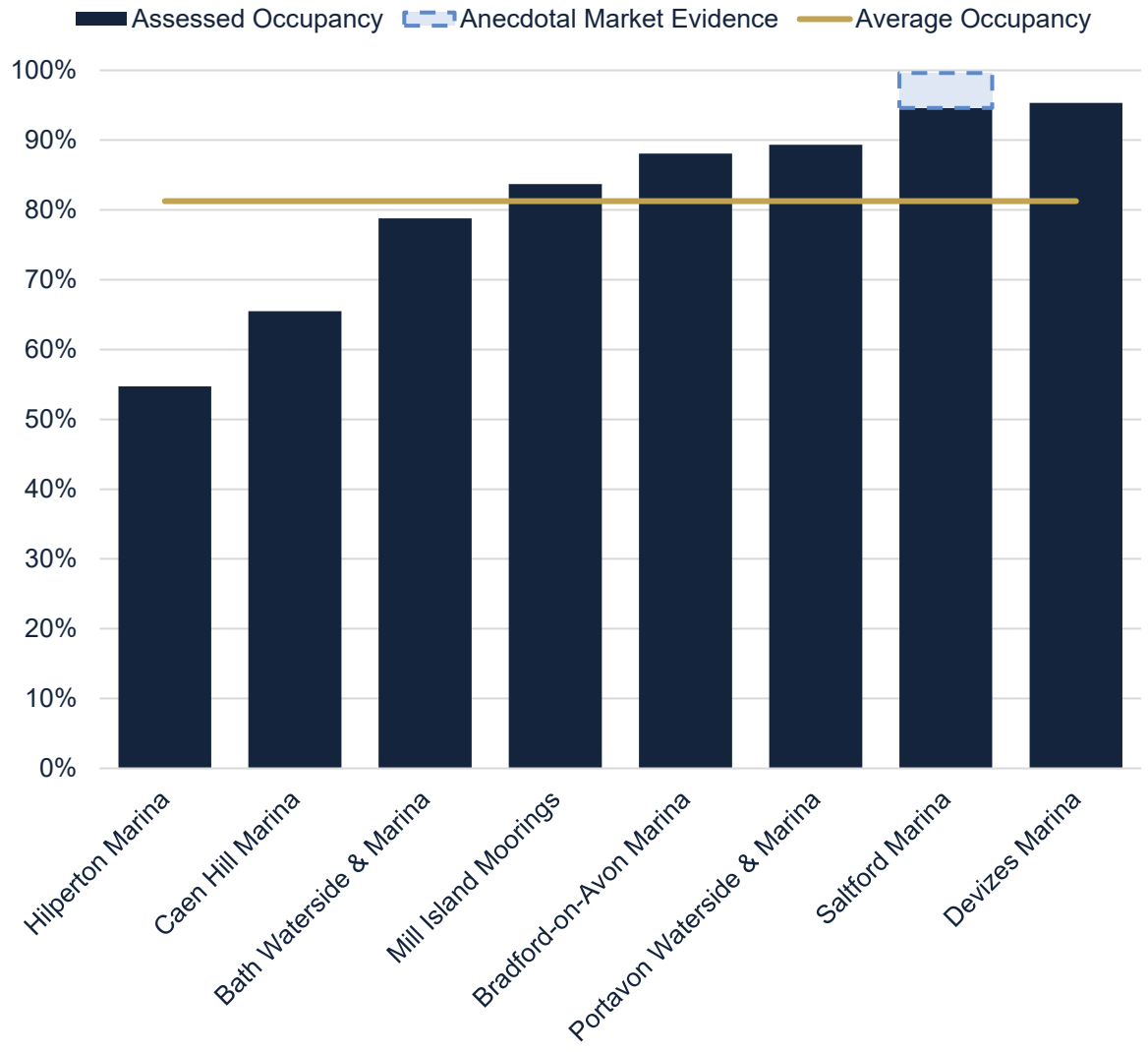


# Regional Market Occupancy: Inland

The average occupancy in the inland regional market is approximately 80%, demonstrating the high level of demand for berthing in the area. It likely also reflects the limited number of marina facilities due to space constraints on the canal.

Hilperton and Caen Hill Marinas are assessed as having lower occupancy, however, this appears to reflect their popularity as visitor destinations. Caen Hill Marina is located near the Caen Hill Flight, a unique series of 29 locks, while both marinas are home to boat hire operators, supporting short-term leisure use. As a result, they prioritise short-term berthing and are heavily influenced by seasonal visitor patterns.

Anecdotal market evidence suggests that Saltford Marina has 100% occupancy with the marina operator confirming that there is currently no berthing availability (as of November 2025).



# 3.7 Regional Market Assets

This section identifies the existing provision of support facilities and services that underpin the regional marine leisure market and shapes the overall boating customers experience. The section also considers other types of on water activity outside of the primary marinas to further the understanding of marine leisure activity in the region and presents opportunities for Bristol Harbour to attract some of this activity.

The assessment provides further information which helps to establish Bristol Harbour's position within the region.

# Yacht and Sailing Clubs

There are 18 Yacht and Sailing Clubs in the regional market and are distributed as follows:

- **Coastal:** 15
- **Inland:** 3

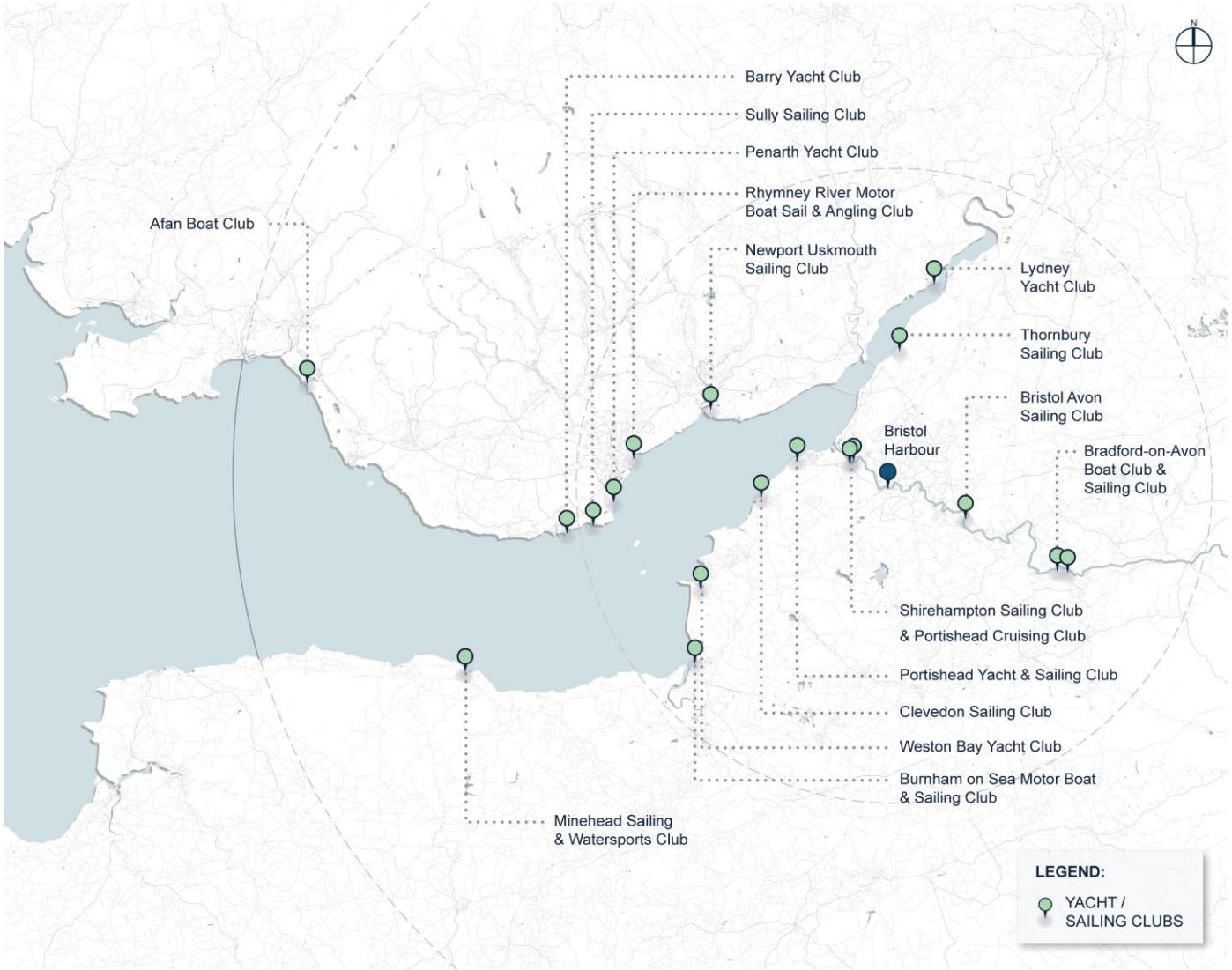
It is important to note, Cardiff Bay YC, Monkstone YC and Cardiff YC are excluded from this section of analysis as they are categorised as marinas due to their berth offering. Notwithstanding this, these Clubs will have active events and Club activity throughout the year contributing to the overall boating culture in the region.

The concentration of Clubs along the coast reflects the greater boating opportunities available, including access to open water for regattas, Club racing, and fishing, compared with the Kennet and Avon Canal.

The number of Clubs in the regional market reflects a strong boating culture and demand for berthing. This presents an opportunity to foster relationships with these Clubs, attract member events to Bristol and raise awareness of the city as a boating destination to both Club members and the wider boating community.

Many of these Clubs operate independently and are not connected to a marina. Instead, they typically have their own facilities including slipways, mooring arrangements, and Club houses.

The generally independent management of the Clubs reflects a focus on traditional sailing activities, Club autonomy, and long-established member communities.



# Water Sports Clubs

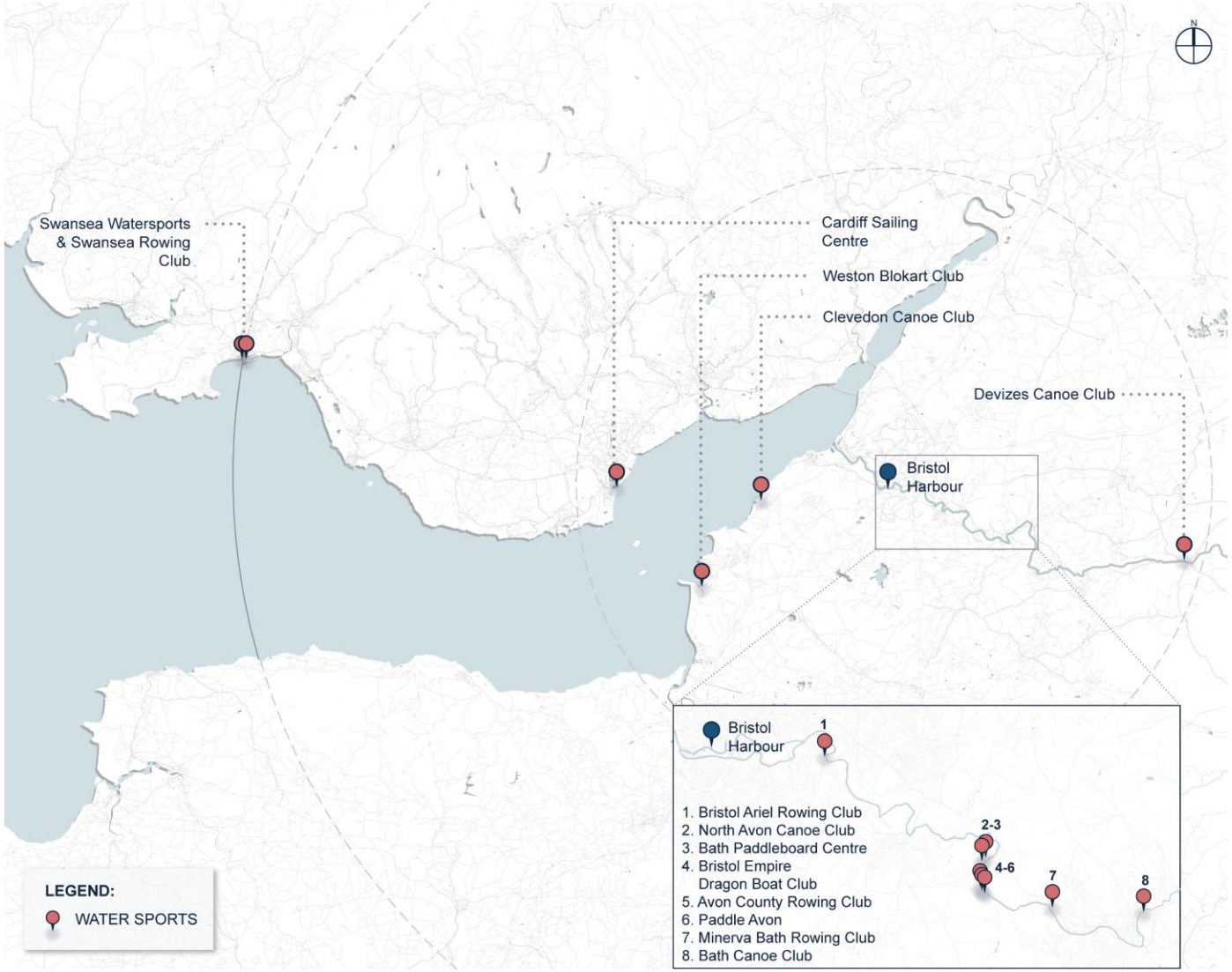
In addition to the large number of traditional sailing and Yacht Clubs, the regional market comprises 14 watersports Clubs, which are allocated across the area as follows:

- **Coastal:** 5
- **Inland:** 9

There is a significant concentration of watersports Clubs across the region, particularly focused on rowing, canoeing, and stand-up paddleboarding (SUP). Activity is most notable within key boating hotspots such as Swansea Bay, Cardiff Bay, and along the Kennet and Avon Canal between Saltford and Bath.

Rowing and canoe Clubs are especially prominent between Saltford and Bath in the inland market, hosting regular training sessions, regattas, and community events. SUP Clubs and informal paddle groups are becoming increasingly common in both urban waterfront areas and upstream rural stretches, catering to rising demand for accessible, low-intensity water recreation.

The density of these Clubs demonstrates strong local participation and investment in facilities such as slipways, vessel storage, and Clubhouses. This pattern reflects robust grassroots engagement and sustained recreational use of sheltered waterways, particularly in the Canal.



# Watersports Commercial Operators

Watersports commercial operators are distributed across both inland and coastal settings as follows:

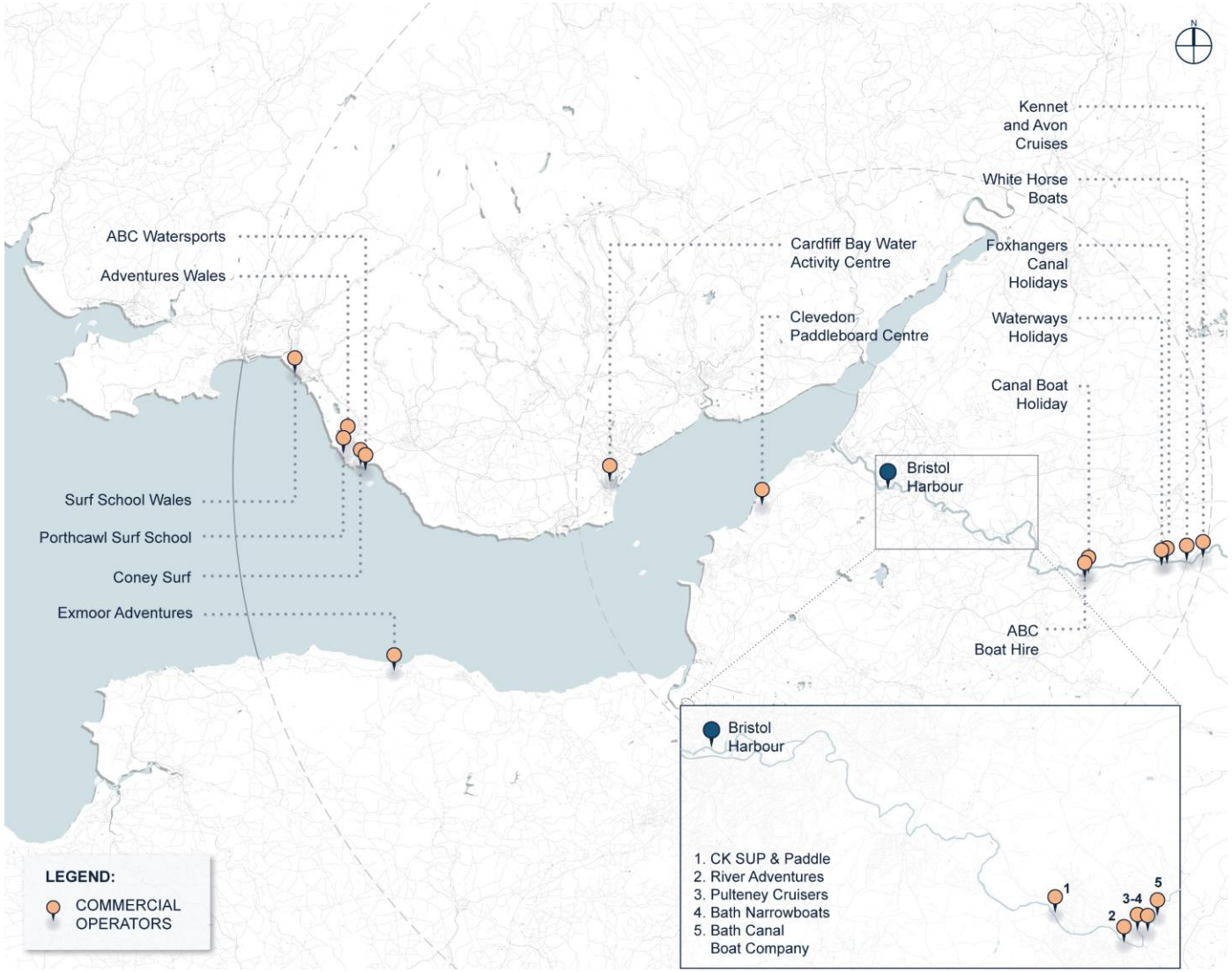
- **Coastal:** 8
- **Inland:** 11

These operators frequently occupy sites within or adjacent to established marinas, taking advantage of sheltered waters, good navigation access, and existing shoreside infrastructure.

Their presence complements the strong network of community Clubs by broadening the range of accessible water experiences available to residents and visitors, ranging from equipment hire and guided tours to instructor led classes and training.

Commercial operators in the Bristol Channel and Kennet and Avon Canal show distinct patterns in activity types. Inland, activities here tend to focus on small-scale, accessible experiences such as boat hire, paddleboarding, and other recreational water sports suitable for the canal environment.

In contrast, operators in the Bristol Channel are more dispersed along the coastline, offering activities suited to open water conditions. These include sailing, powerboating, and other adventure-based or performance-focused water sports.



# Boatyards and Fuel

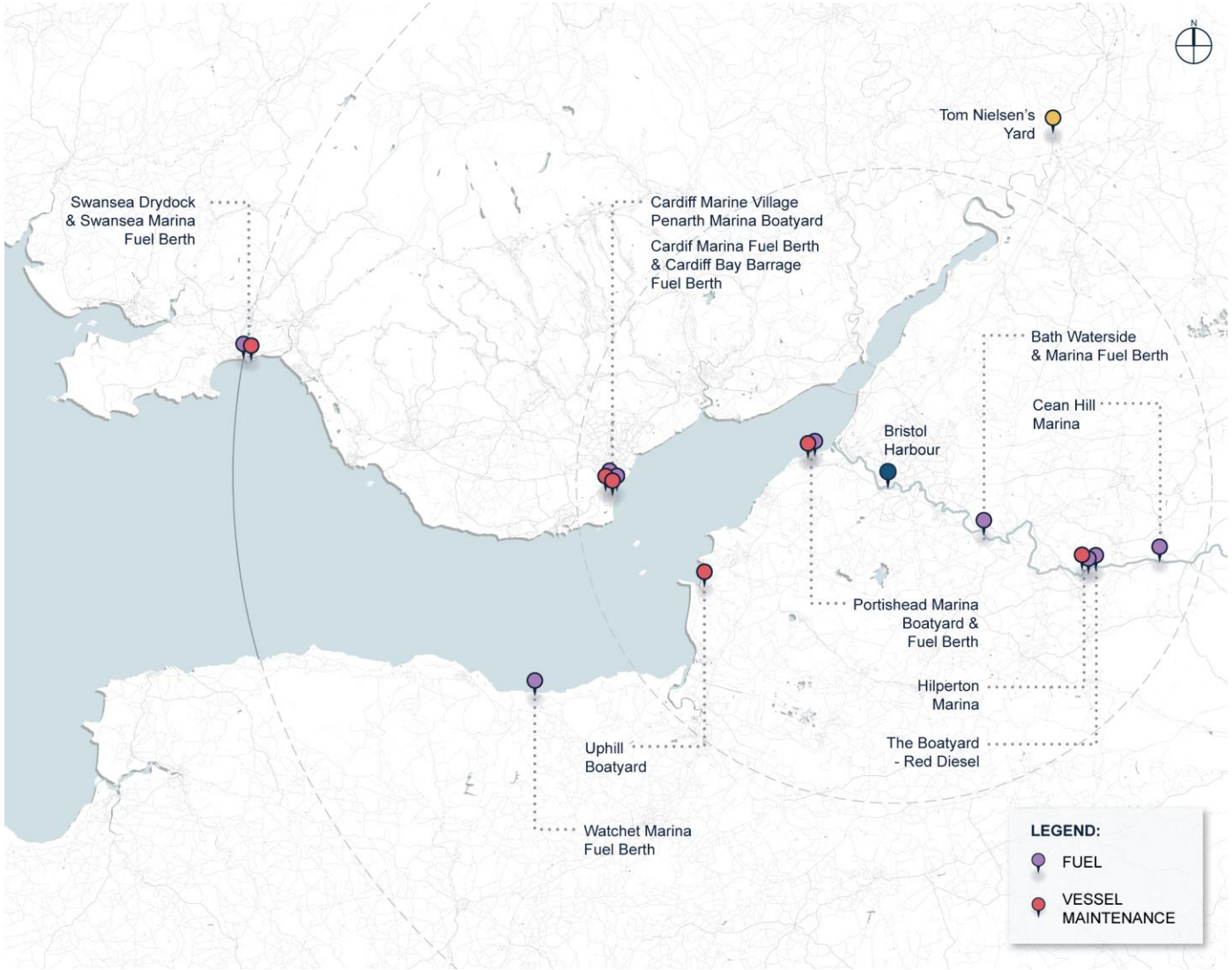
Within the regional market, there are 6 boatyards and 9 fuel stations.

Fuel stations and boatyards in the coastal area are generally located at boating hubs with a higher concentration of activity in Swansea Bay and Cardiff Bay. Outside these areas, provision is notably sparse.

This limited distribution reflects the level of demand for such services in the region, with many vessels participating in day boating or shorter-term cruising (i.e. weekend excursions) close to their home port. As a result, there is reduced need for frequent refuelling or maintenance.

There is one maintenance facility which offers basic services in the inland regional market, which aligns with the reduced servicing needs of vessels in a freshwater environment. Notwithstanding this, these vessels still require maintenance, refit and other technical services. Bristol Harbour as the nearest area offering such services presents an opportunity for Bristol to strengthen its market position and further promote its services to regional boat owners.

While Tom Nielsen's Yard is outside of the study area, it is a significant facility in the wider region and important to acknowledge its presence in the context of the study.



# Slipways

There is a high concentration of slipways along the south coast of Wales, again, particularly in zones with high boating activity such as Swansea Bay, Cardiff Bay and Barry. The distribution on the North Devon, Somerset and Gloucester coastline is notably sparser, reflecting lower overall activity in these areas.

Across the regional market, a total of 51 slipways were identified, with 25 located on the English side (including inland slipways) and 26 in Wales.

The Welsh coast features more sheltered bays and natural harbours than the English side of the Bristol channel which are ideal for slipway placement and frequent vessel launching.

Slipway locations, whether public, private or RNLI operated, consistently cluster in areas supporting active boating, water sports, and rescue services. This pattern highlights the operational importance of slipways for vessel launching and retrieval, emergency response and recreational access where user demand is greatest.

Outside these established hubs, lower boating activity or less intensively used coastlines is mirrored by the more limited slipway provision.



# Parking

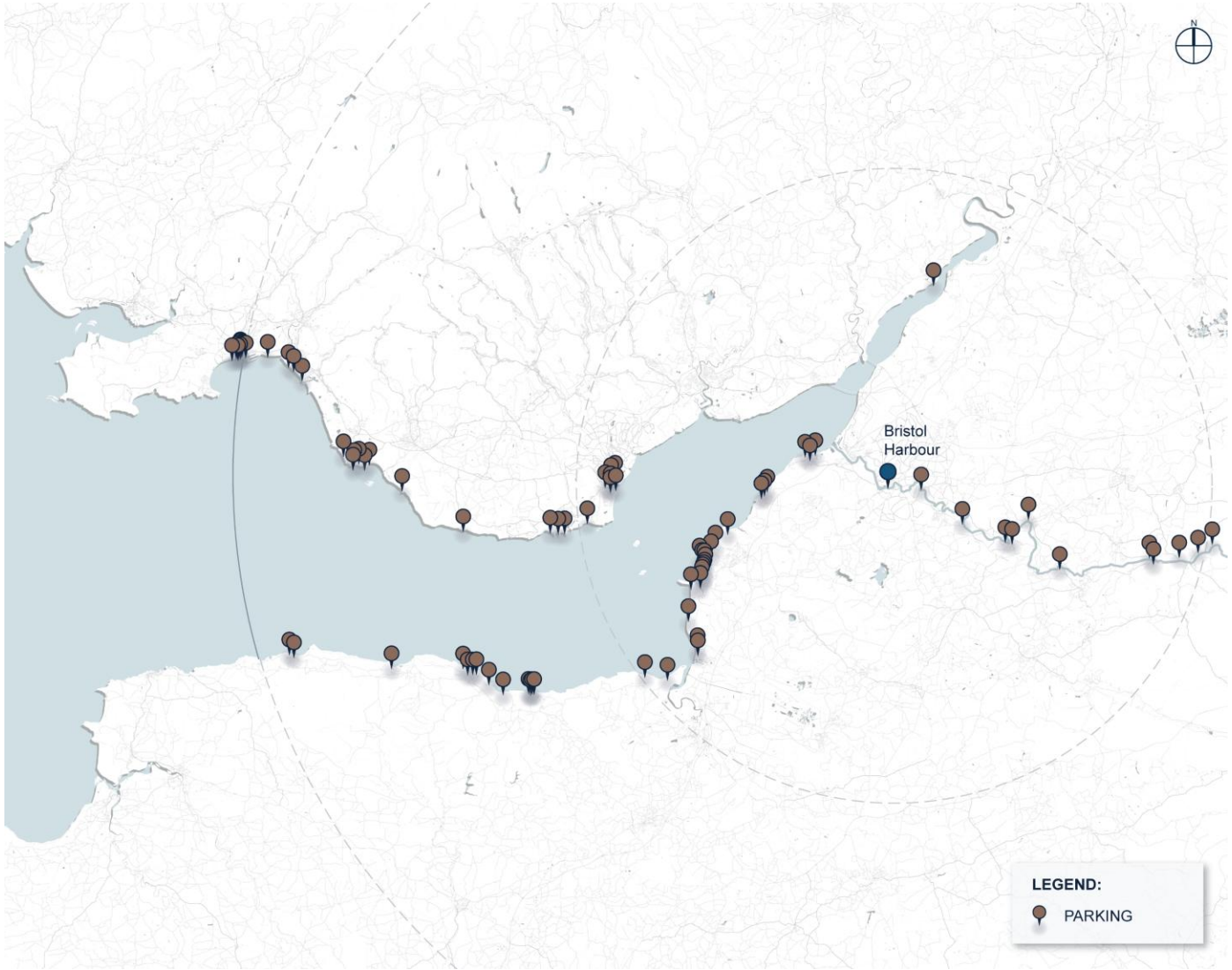
Car parking facilities in immediate proximity to the coastline and marinas across the regional market highlights a contrasting pattern to other marine infrastructure. The English side of the channel, particularly around Weston-Super-Mare, has higher overall number of car parks.

These facilities frequently coincide with heavily visited waterfronts, urban promenades, and popular tourist destinations, supporting both beach related recreation and access to marina services. The density of car parks in Weston-Super-Mare reflects sustained visitor demand and the importance of facilitating high volumes of day-users, seasonal tourists, and boating participants.

On the Welsh side, car park provision is most pronounced in established urban hubs like Swansea Bay, Barry, and Cardiff Bay, where access needs of marinas, vessel launch sites, and waterside attractions are concentrated.

Inland and rural segments on both sides of the channel typically have lower provision, except where car parks serve specific marina or Club infrastructure along the River.

The distribution of waterway and marina-adjacent car parks highlights the importance of providing convenient parking and drop-off areas near marinas and waterfront access points, enhancing both convenience and the overall boating experience.



## 3.8 Regional Market Tariffs

This section reviews the available leisure berthing tariffs within the region for both the coastal and inland markets. It is important to note, it has not been possible to confirm the pricing for all marinas.

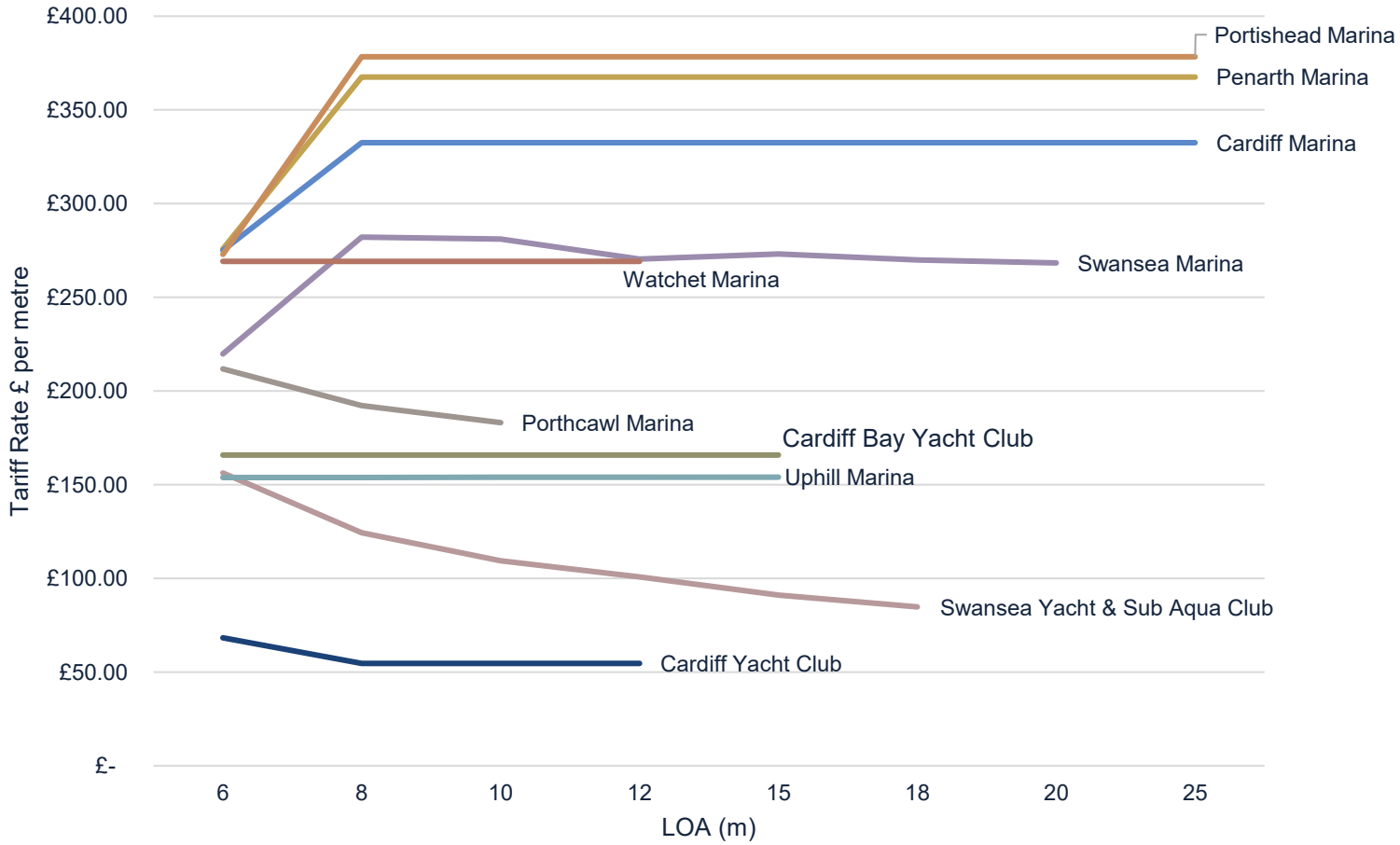
Tariff rates have been sourced from publicly accessible marina websites and supplemented through direct correspondence with operators where possible.

Annual tariff rate refers to price per metre charged for the length overall (LOA) of a vessel.

Daily tariff rate refers to price per night charged for the length overall (LOA) of a vessel.

All prices exclude VAT and are presented in Stirling (£).

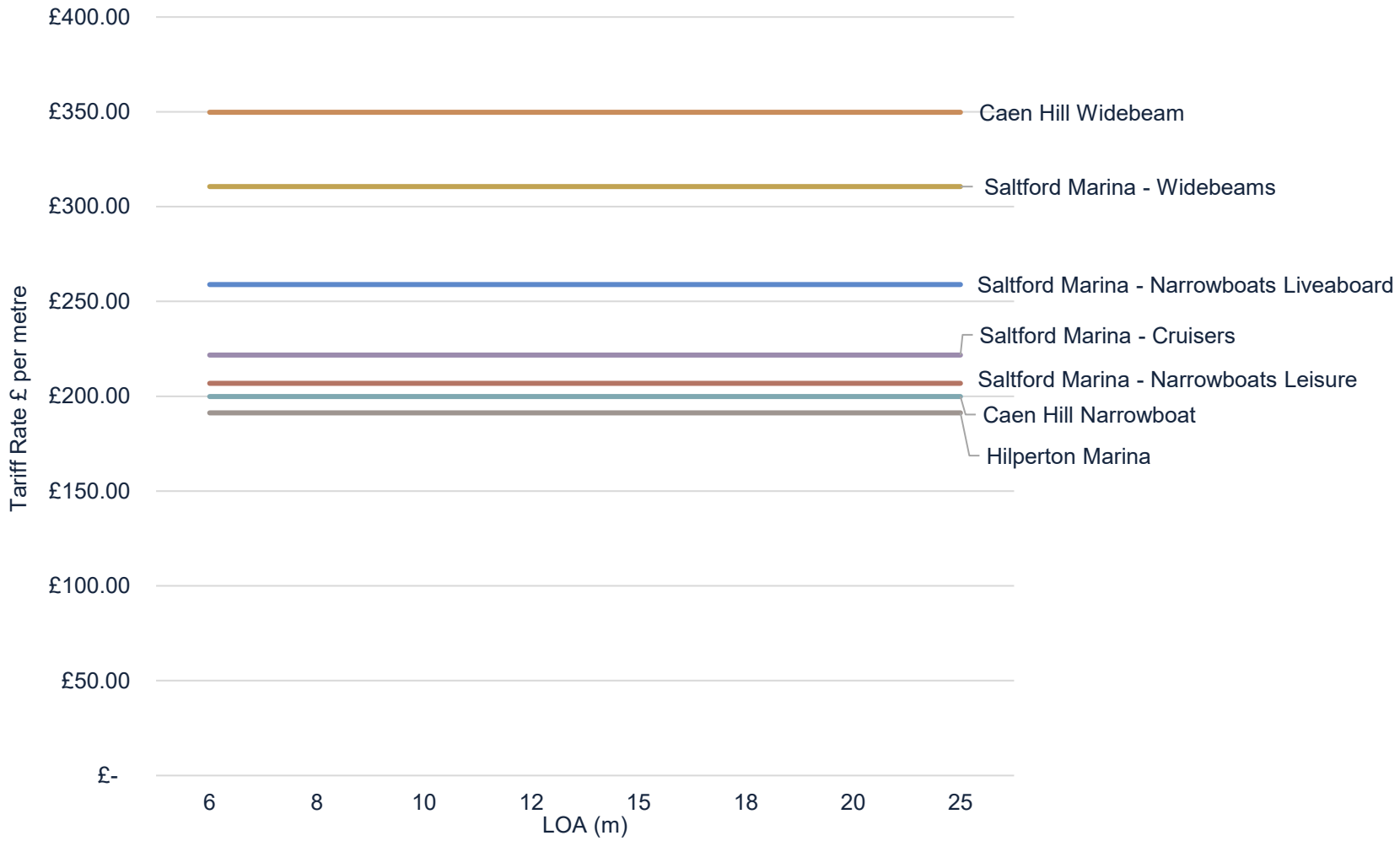
# Regional Annual Tariffs: Coastal




The analysis only considers leisure berthing for the coastal market as there are no liveaboard rates as this type of activity is not present in the coastal area. The following observations are of note:

- Tariff structures vary considerably across marinas, reflecting differences in the nature, quality, and tidal access of each facility.
- Swansea Yacht & Sub Aqua Club, Cardiff Bay Yacht Club and Cardiff Yacht Club tariffs are reflective of member run Clubs operated as not for profit.
- Marinas with the highest prices such as Portishead, Penarth and Cardiff are operated as commercial marinas offering dedicated customer services and high-quality facilities.
- Despite significant siltation and operational challenges faced at Watchet Marina, the marina is priced higher than member run Clubs, which have better tidal access and a comparable range of facilities. Pricing is likely a reflection of its position on the north Somerset coastline and only safe haven for vessels on passage to the south.
- Coastal marinas apply a linear tariff, which does not differentiate based on vessel size and associated demands.

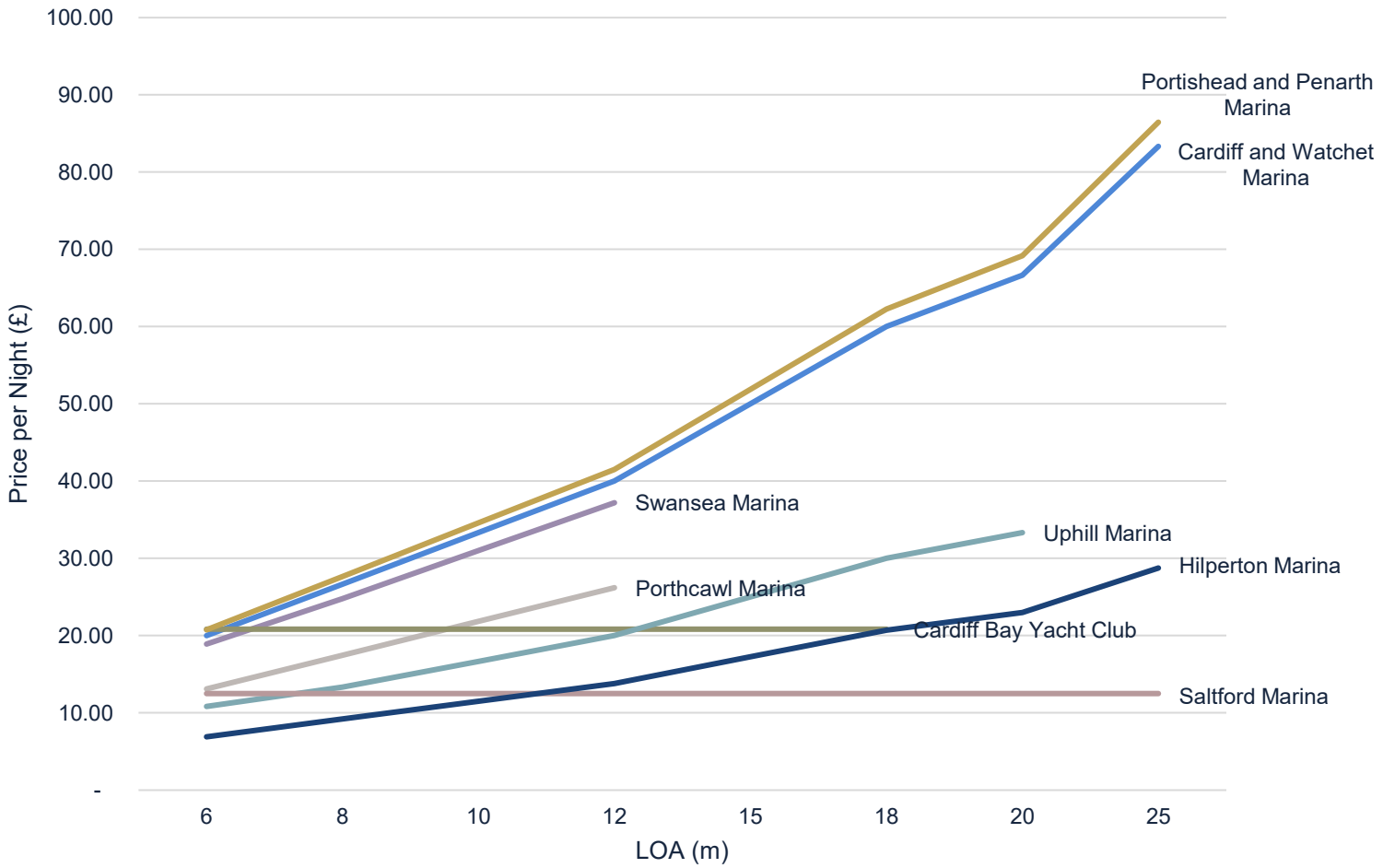
# Regional Annual Tariffs: Inland




The following observations of inland marina pricing are as follows:

- Inland marinas generally offer different tariffs based on vessel type. As with coastal marinas, it is notable all marinas apply a linear tariff.
- Saltford Marina and Caen Hill charge separate rates for narrowboats and widebeam vessels.
- It is noteworthy Saltford Marina provides 4 tariffs for different vessel types. This recognises the varying ways each vessel type uses waterspace, infrastructure, utilities and services.
- Compared to the coastal market, inland marinas are priced competitively. They are priced above the Club-run marinas but below more commercial and premium offerings.
- The exception to this is the widebeam tariff at both Caen Hill and Saltford, which aligns more closely with the rates of premium coastal marinas. This reflects the significantly greater amount of waterspace and infrastructure these vessels occupy.
- Bristol Harbour could adopt a pricing strategy that differentiates tariff rates by vessel type, such as applying distinct fee structures for narrowboats and widebeam vessels.

# Regional Daily Tariffs: Coastal and Inland




The daily tariffs for coastal and inland marinas are presented on the adjacent graph as a per night rate to allow for comparisons. The following observations are of note:

- Penarth, Portishead and Cardiff marinas, charge the highest rates in the regional market, suggesting strong visitor demand and reflecting their premium positioning and wider range of facilities.
- Watchet Marina appears as an outlier. While the marina has experienced recent operational and siltation challenges, the pricing is likely a reflection of its position on the north Somerset coastline and only safe haven for vessels on passage to the south.
- Inland marinas (Hilperton and Saltford) have significantly lower daily rates compared to most coastal marinas, reflecting a different market profile. These sites often emphasise visitor access and generate additional income through charges for premium facilities and services, which may help account for their lower baseline overnight fees.
- Marinas use a combination of per night and per metre tariffs for their daily rates. To allow for direct comparisons, the assessment is presented on a per night basis. While daily rates may appear stepped, in practice all marinas apply a linear structure. This results in larger vessels paying the same as a smaller vessel which does not reflect the three dimensional characteristics of vessels.

# 3.9 Local vs Regional Market Tariffs

This section compares Bristol Harbour's tariffs against the regional market. As the regional market is comprised of two distinct areas, Bristol Harbour's rates have been assessed separately as follows:

**Coastal**

The coastal market consists solely of leisure boats, with no canal vessels such as narrowboats, widebeam vessels, or barges. Therefore, only Bristol Harbour's pontoon tariff has been included in the analysis, as it is the only relevant comparison in this market.

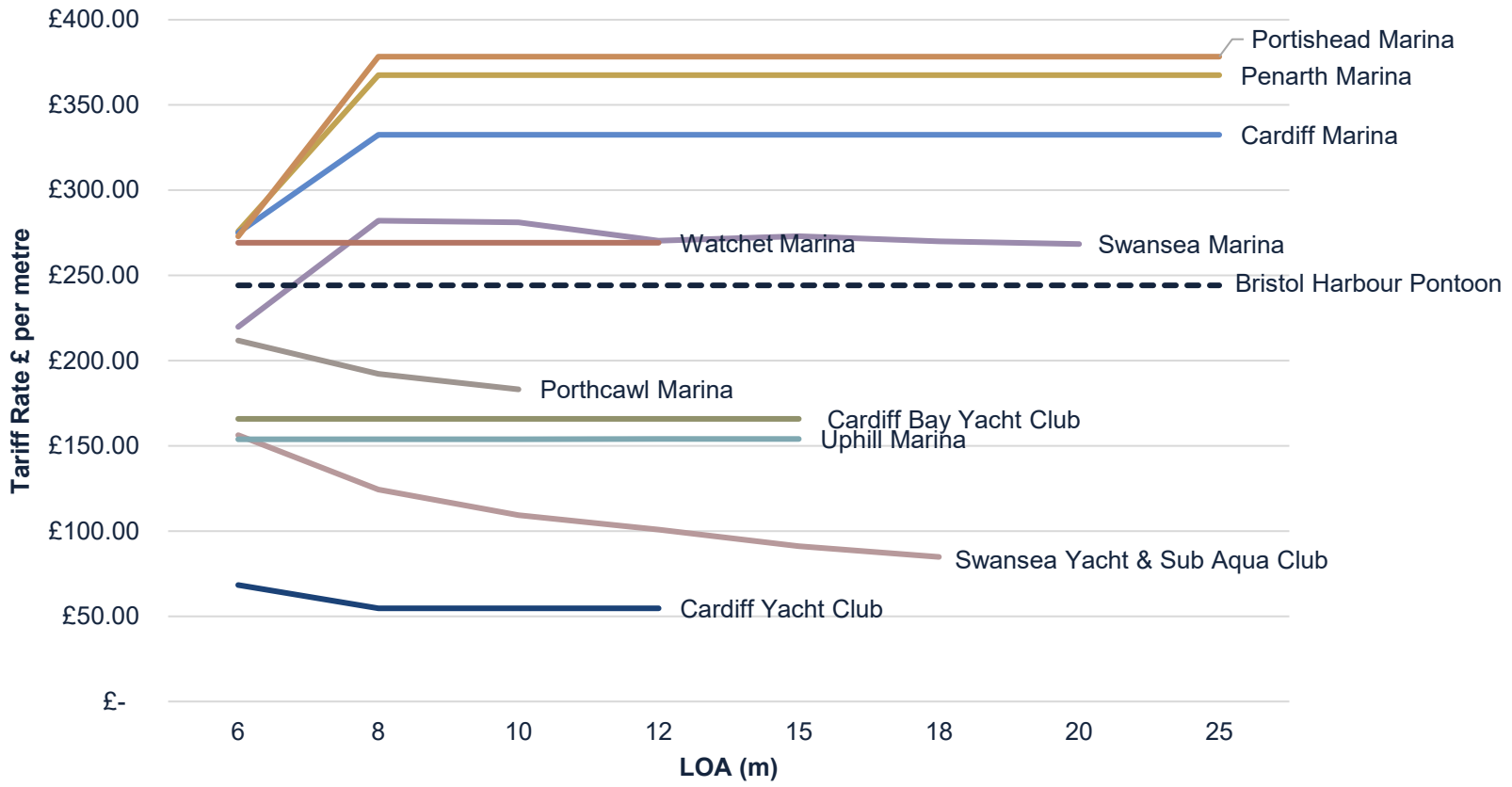
**Inland**

Bristol Harbour's pontoon and liveaboard tariffs have been compared to inland marina tariffs, as both vessel types and corresponding pricing exist in this market.

This analysis highlights Bristol Harbour's current pricing position within the regional market and identifies potential opportunities to adjust fees in line with market conditions.

*Note: For leisure berthing, only Bristol Harbour's pontoon rate has been used in this assessment, as all regional marinas have walk-ashore pontoons, ensuring a fair comparison.*

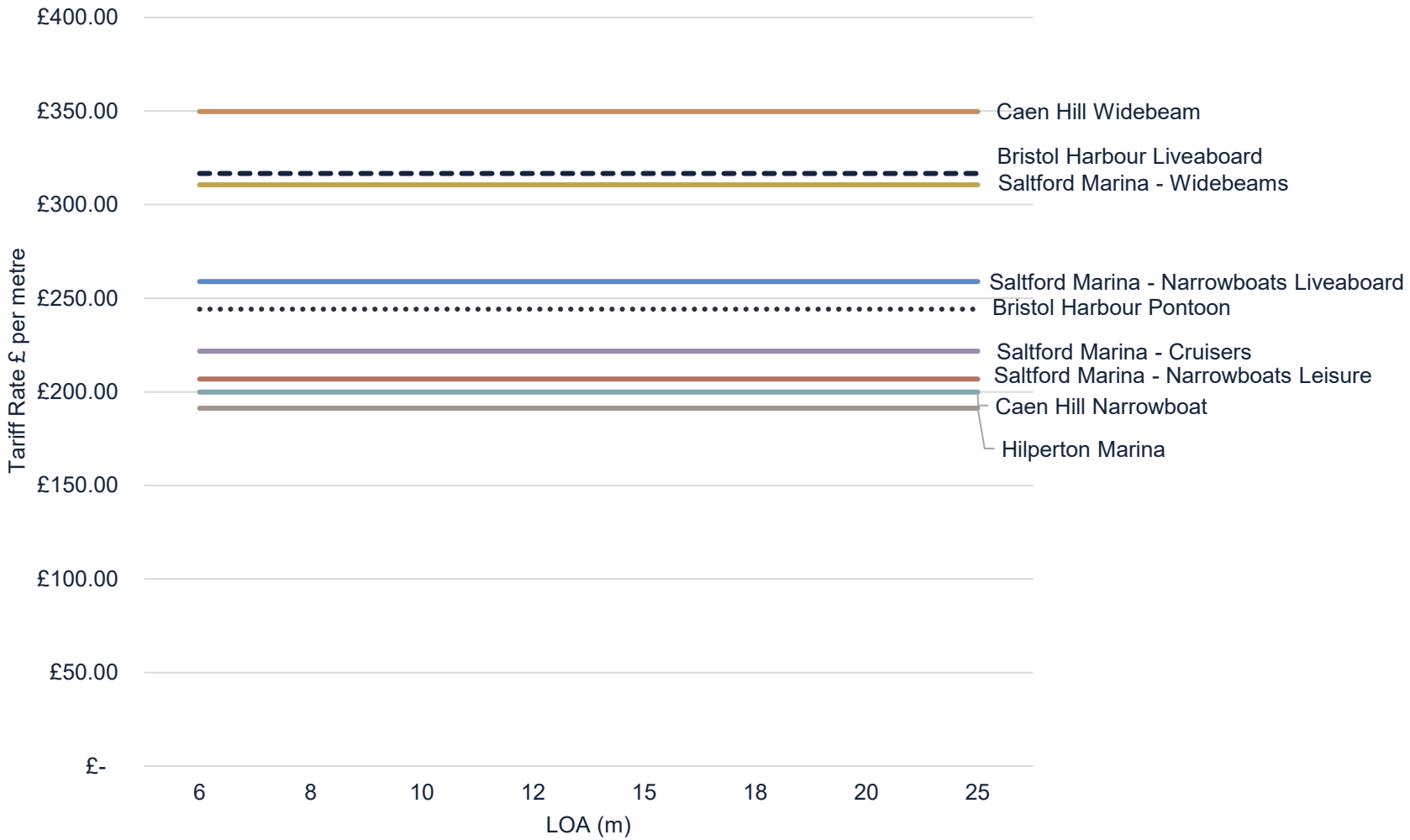
# Coastal vs Local Annual Leisure Tariffs




**Market Observations**

- Bristol Harbour's pontoon tariff sits in the middle of the regional tariff range.
- However, when taking into account the membership structures at Swansea Yacht Club, Cardiff Yacht Club and Cardiff Bay Yacht Club, and the siltation and operational challenges experienced at Uphill and Watchet Marinas, Bristol Harbour is priced low relative to the overall coastal market.
- Watchet Marina can be considered the closest comparable to Bristol Harbour, primarily due to its level of access. However, despite ongoing challenges that are being addressed under new management, Watchet Marina has more limited access than Bristol Harbour, with only two hours either side of high water. Bristol Harbour remains below this, suggesting that there may be scope to raise tariffs while also reviewing a broader range of pricing options.
- Stepped tariffs could be adopted at Bristol Harbour to more appropriately account for the increased waterspace, service, and infrastructure requirements of larger vessels.

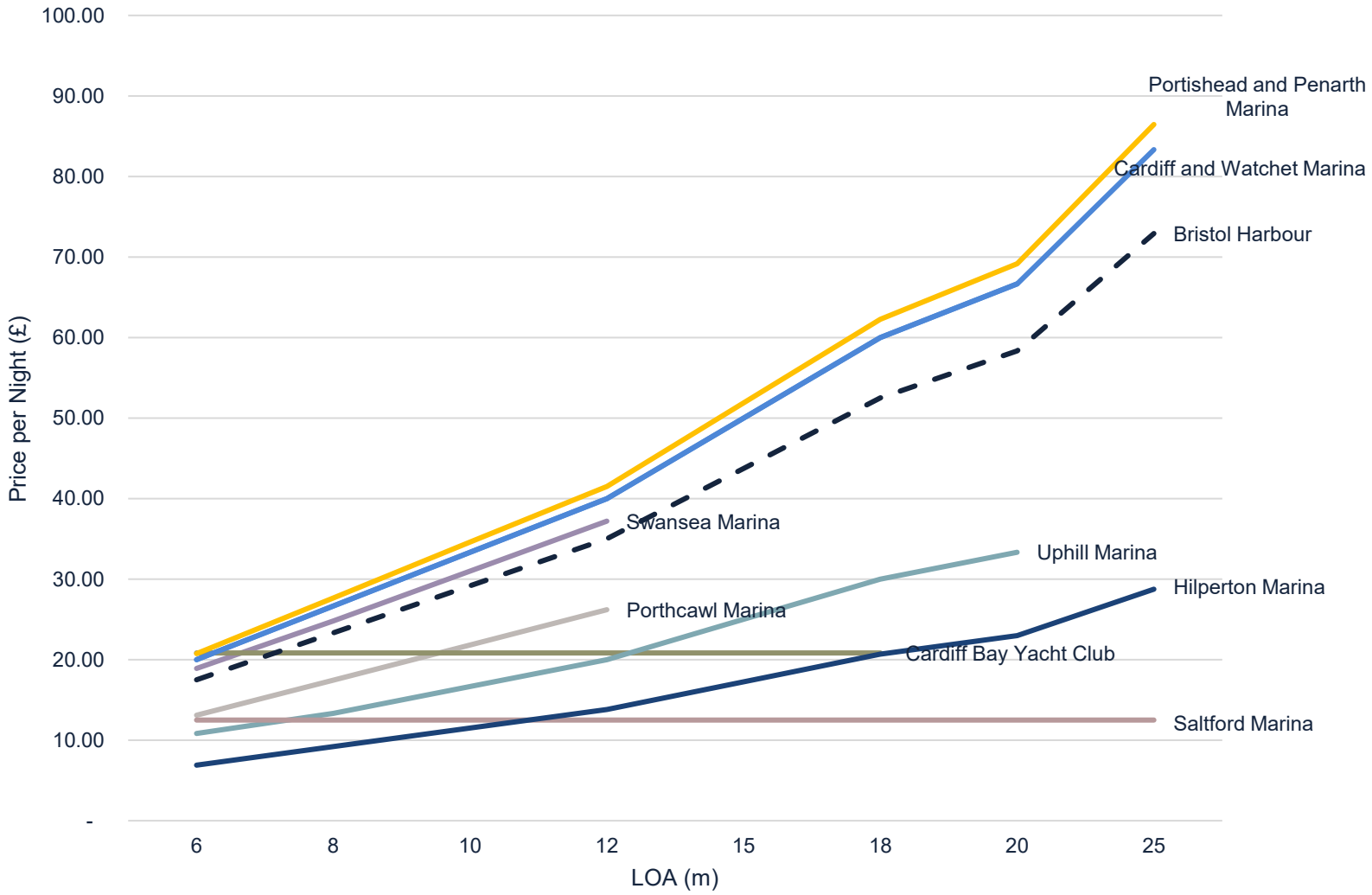
# Inland vs Local Annual Leisure and Liveaboard Tariffs




**Market Observations**

- Bristol Harbour's pontoon tariff is the highest priced when compared with the inland market leisure tariffs.
- Bristol Harbour's liveaboard tariff is competitively priced and aligns with widebeam tariffs in the inland market.
- Together, these pricing patterns highlight the need to introduce a broader and fairer range of tariffs that reflect the different vessel types and mooring options available in the Harbour.
- Notwithstanding the above, it is fair to say these higher charges reflect the Harbour's prime city-centre location, where tariffs include a premium for direct access to a wide range of amenities, entertainment, shops, restaurants, and cultural attractions.
- Stepped tariffs could be adopted to more appropriately account for the increased waterspace, service, and infrastructure requirements of larger vessels.

# Coastal and Inland vs Local Daily Tariff




**Market Observations**

- Bristol Harbour's pricing is broadly comparable with the upper end of coastal marina rates.
- The study has identified Watchet Marina as a primary comparator to Bristol Harbour. The visitor rate at Watchet provides further evidence that Bristol Harbour has potential to increase rates.
- With a diverse range of vessel types, provision of vessel servicing facilities, larger infrastructure, and a strategic position between coastal and inland waterways, Bristol Harbour has a strong case for aligning its rates closer to the coastal market than the inland market.
- Stepped tariffs could be considered for Bristol Harbour to more appropriately account for the increased waterspace, service, and infrastructure requirements of larger vessels.

# Section 4 - Wider Market Benchmarks





# Introduction

In Section 4, we have identified two comparable locations in the UK to Bristol Harbour with consideration to the city centre context. The areas that will be discussed are:

- Liverpool South Docks, Liverpool
- St Katharine Docks, London

This analysis will focus on three key areas:

- Types of moorings available,
- Mooring tariffs and licence durations (where available)
- Lessons learnt & critical factors

By conducting this broader assessment, we aim to gather valuable insights that can guide future development opportunities and service improvements. With the view to position Bristol Harbour more competitively within the national marine leisure market.



## Liverpool South Docks

# Overview

Liverpool South Docks is an iconic waterfront known for its extensive maritime history and unique architecture. Similarly to Bristol Harbour, Liverpool's South Docks have transformed over time from an industrial and commercial port to one centered around tourism and leisure activities.

A feat of engineering, the South Docks comprise of 7 basins that can be accessed via Brunswick Lock with access 2 hours either side of high water (Liverpool) in the south and Canning Half Tide Dock in the north. Within the Dock itself there are a combination of swing and fixed bridges.

The River Mersey has a large tidal range of 10.2m with stream rates of up to 7 knots. Sea conditions are challenging, and this has parallels with the challenging tidal conditions in the Bristol Channel.

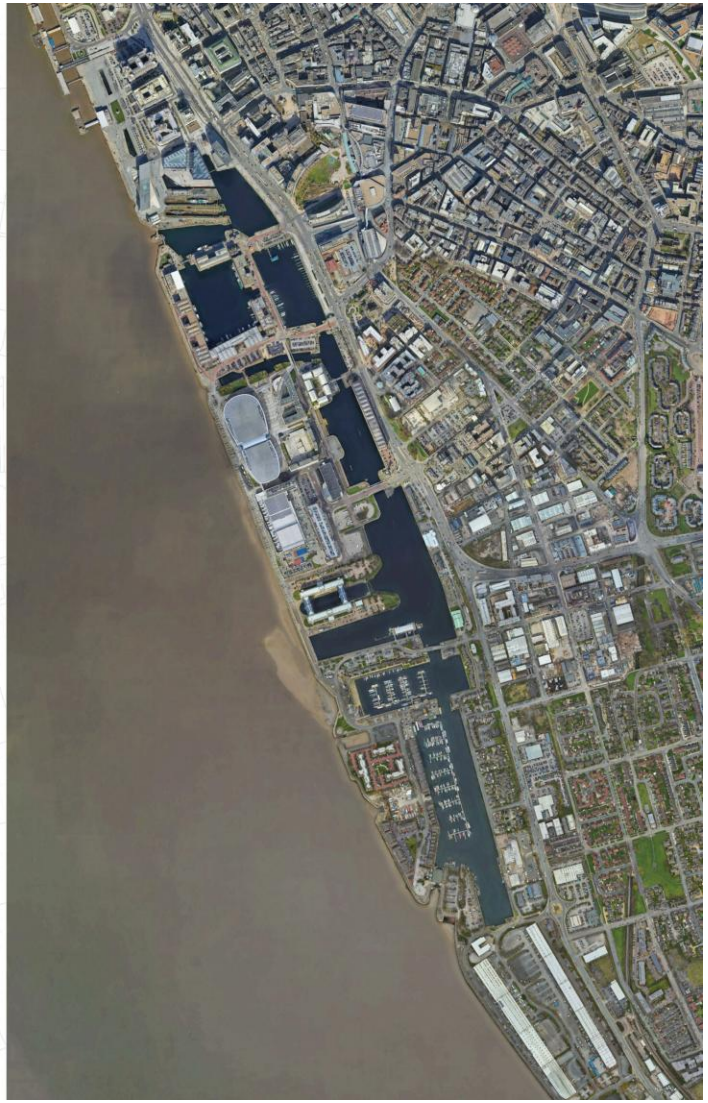
In 2009, the Liverpool Canal Link was opened connecting the Leeds and Liverpool Canal with the city centre and brings increased inland vessel activity to Liverpool South Docks.

Within the South Docks there are 3 primary leisure moorings areas:

- Liverpool Marina, privately owned, under long lease from the Canal & River Trust
- Royal Albert Dock, managed by The Canal & River Trust
- Salthouse Dock, managed by The Canal & River Trust

The mooring areas attract a diverse mix of vessels and users, including leisure, heritage, and commercial boats. The South Docks feature a vibrant waterfront, with activity from moorings, the Yacht and Canoe Clubs, watersports, floating accommodation, and accessible public spaces, all contributing to the area's tourism appeal.



# Liverpool South Docks Facilities

The existing facilities at the three marina locations in South Docks are summarised in the table below. While it is acknowledged that berth holders at one marina may access facilities at the others, for the purposes of this analysis, each facility is listed only under the marina or mooring area where it is provided.

| | Year Built | Max LOA | Essential Pontoon Services* | Boatyard | Crane (Tons) | Travellift (Tons) | Storage Ashore | Slipway | Fuel | Pump out | Parking | Laundry | CCTV / Security | Yacht Club | Watersports Activities | Accreditation |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Liverpool Marina | Pre-2000 | 25 | Y | Y Third party operator | N | 60 | Y | Y | Y | Y* & Elsan Disposal | ~Y | Y | Y | Y | Y | 4 Gold Anchor |
| Royal Albert Dock | 2003 | 20 | Y ^See below note | N | N | N | N | N | Y Provided by Liverpool Marina | Y Provided by Liverpool Marina | Y | N | Y | N | N | N |
| Salthouse Dock | 2007 | 20 | Y ^See below note | N | N | N | N | Y | Y Provided by Liverpool Marina | Y Provided by Liverpool Marina | Y | N | Y | N | N | N |

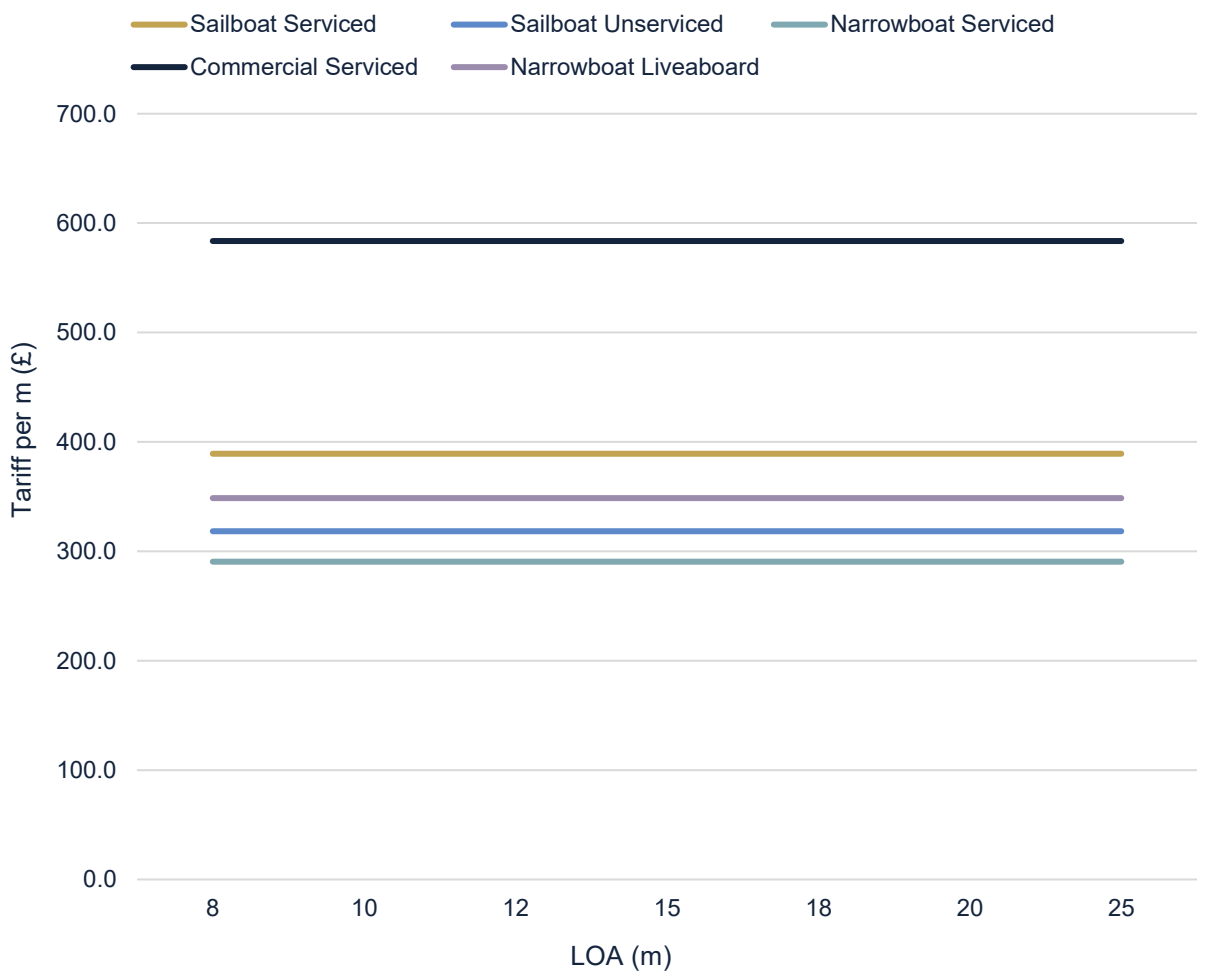
^Toilets and showers are publicly accessible and do not form part of the mooring agreement. It has not been possible to confirm availability of Wi-Fi.
*Mobile Services can be provided at berth but are restricted to Monday – Friday, 9am – 1pm.
~Free city centre parking

N = Absence or unable to confirm presence of facility | *Essential Pontoon Services includes water, electric, customer facilities and Wi-Fi

# Liverpool Marina Annual Tariffs

Liverpool Marina offers a range of tariff durations however, for the purposes of this assessment, only annual rates are discussed. The following observations are of note:

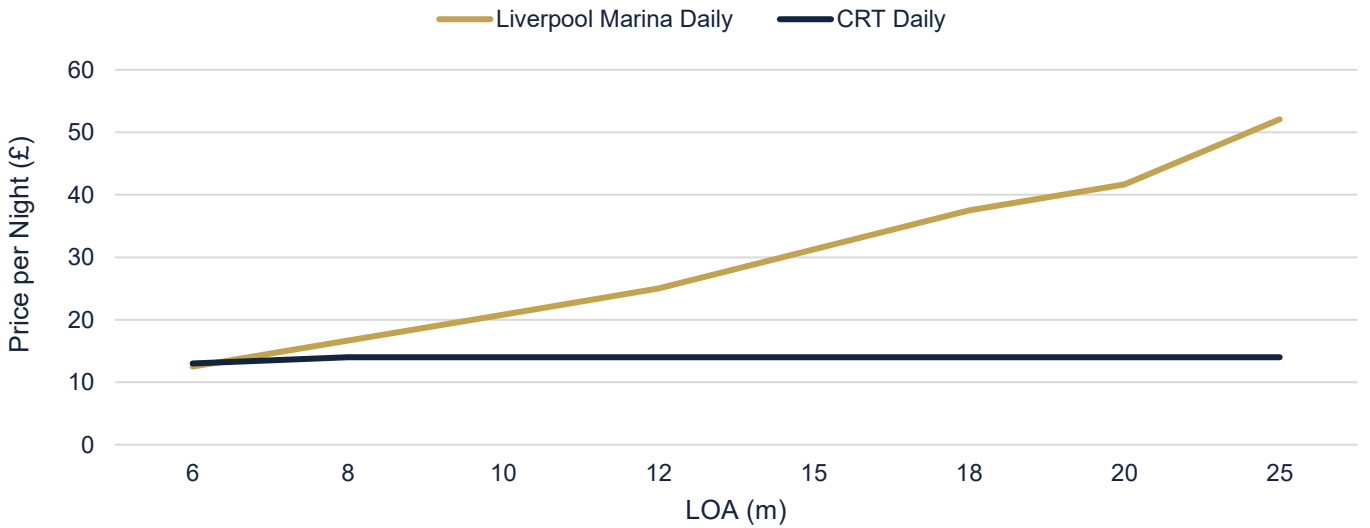
- Tariff rates vary by vessel type, with commercial vessels charged significantly more than leisure vessels.
- The marina offers serviced and unserviced berths for sailboats only. There is a reasonable difference between the two tariffs reflecting the types of berthing product.
- Narrowboats on serviced berths are charged less than sailboats on unserviced berths. While the reasons are not stated, it is likely related to sailboats occupying more waterspace than a narrowboat. However, the difference in fees should arguably be smaller, given that the serviced berths provide electricity and water.
- A long stay liveaboard contract incurs an additional 20% uplift in addition to the annual fee. It is notable despite the high use nature of these vessels, the tariff remains below a serviced sailboat vessel.
- The marina applies a linear tariff structure, charging a single rate regardless of vessel length. This approach does not reflect the greater demand larger vessels place on waterspace, infrastructure and facilities.
- Bristol Harbour's pontoon and liveaboard tariffs are priced below Liverpool Marina's (£293/m and £317/m respectively). This suggests there may be opportunity to increase Bristol's pricing in line with regional comparators.




*All prices ex VAT and include free parking and hardstanding for 2 weeks.*



## South Docks Daily Tariffs




Liverpool Marina applies a per metre rate which has been converted to a per night rate to allow for comparisons with CRT tariffs (applicable to both Royal Albert and Salthouse Dock) which charge a per night rate. All prices are ex VAT.

Liverpool Marina are priced priced considerably higher than CRT moorings. This likely reflects the greater provision of facilities and services and more private environment at Liverpool Marina.

It is noteworthy Bristol Harbour is priced higher than Liverpool Marina at £2.90/m in contrast to £2.50/m (ex VAT).

It is important to note the CRT prices include passage through the Liverpool Canal Link.

In terms of additional pricing available:

- CRT's price is applicable up to 7 nights. If stays are 8 nights or more an additional £28/night is charged.
- Liverpool Marina also offers weekly and monthly berthing options.

# South Docks Tariff Insights

- Bristol Harbours annual tariffs are currently lower than those at Liverpool Marina. With the introduction of enhanced facilities and a broader range of services, there is potential to increase these tariffs and align with similar city centre marinas.
- The use of different tariffs for serviced and unserviced berths is a practical way to manage different berthing products. Introducing this approach at Bristol Marina in the short term while wider facilities upgrades are rolled out could provide a broader and fairer range of tariffs reflecting the range of moorings.
- Charging different rates for different vessel types is an established market practice, as seen at here at Liverpool Marina and other locations such as Saltford Marina (inland regional market). It is also common for coastal marinas to charge more for catamarans. Adopting a similar approach at Bristol Harbour could help better align tariffs with types of vessels and their use of waterspace.
- All marinas in Liverpool South Docks use a linear tariff. By applying a stepped tariff, the marinas may have the opportunity to capture additional revenue from larger vessels.







# South Docks Marina Insights

Other points that provide key insights into the South Docks marinas that are relevant to Bristol Harbour:

### Liverpool Marina

- Liverpool Marina's Coburg Dock is currently being redeveloped to accommodate 60 narrowboat berths that are intended for long stay berth holders. The redevelopment is noted as responding to high demand and it is understood there is a waiting list for these berths.
- All moorings at Liverpool Marina are walk-ashore pontoons (finger or alongside).
- It is understood the marina currently enjoys strong occupancy and is operating a waiting list in some categories.
- Access to the pontoons is controlled by security gates.

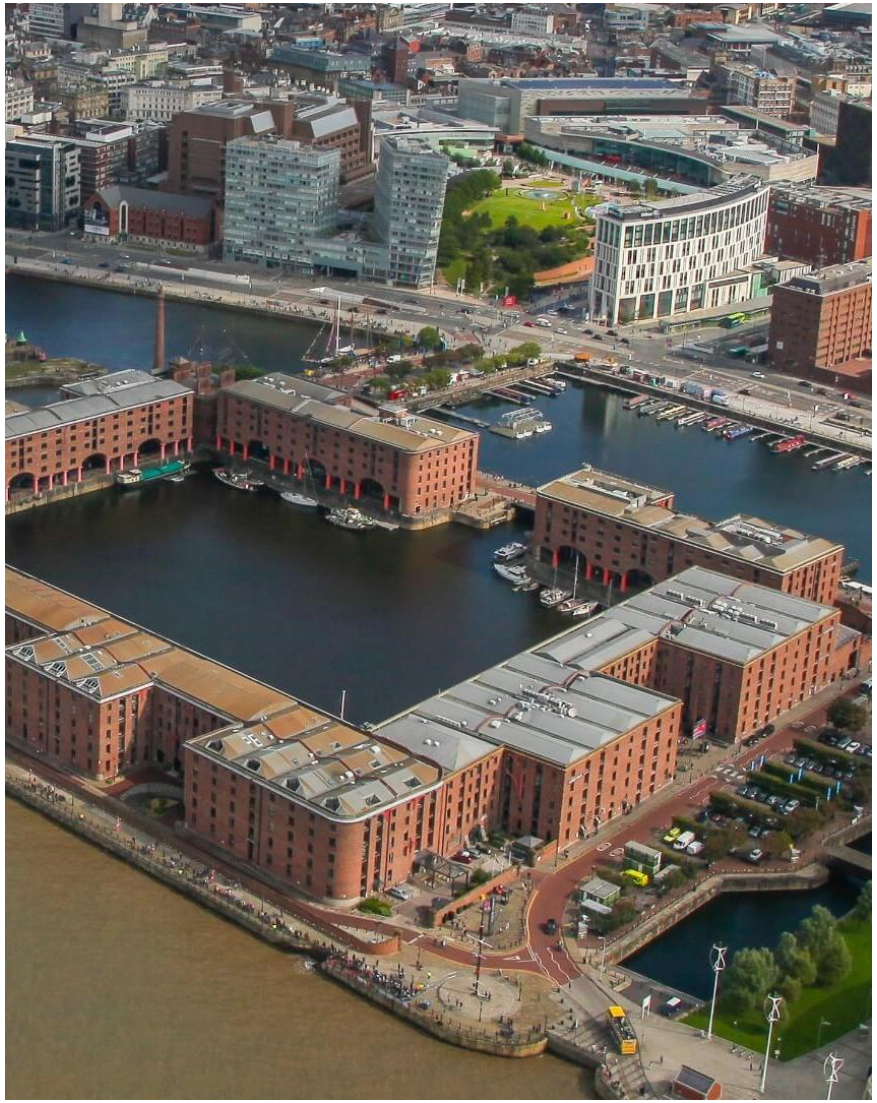
### Royal Albert Dock & Salthouse Dock (CRT)

- Both marinas are fully occupied for long term moorings and operating a waiting list.
- Liveaboard vessels are prohibited at both marinas.
- The Liverpool Canal Link is shut this winter for maintenance and both marinas are not offering winter moorings this year.
- All moorings are walk-ashore pontoons (finger or alongside).
- All access bridges have controlled access via security gates with the exception of visitor moorings in Salthouse Quay where access is unrestricted.

# Lessons Learned & Critical Factors

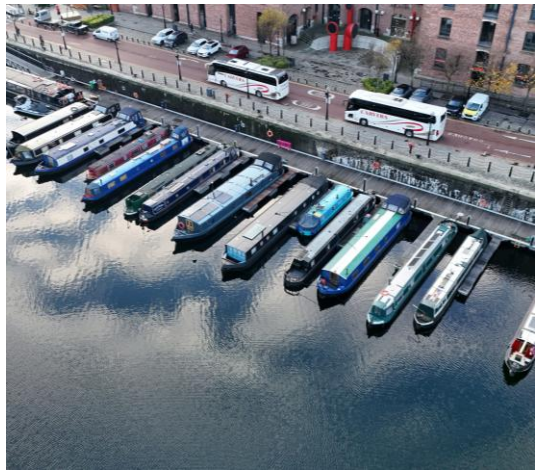
The following summary outlines some key similarities between Liverpool Docks and Bristol Floating Harbour that in turn provides a number of lessons that can be applied to the Bristol Location:

- Historic waterbody with immediate connection to City Centre. This drives demand from a number of sectors and provides waterfront activation and development opportunities
- Furthermore, the docks provides access to coastal waters and the inland waterway network, which creates a broad cross-section of user groups.
- Tidal access restrictions and challenging leisure boating activity significantly influences the nature and extent of demand.
- The City Centre location is a factor in driving demand for liveaboard berthing. This is also positively influenced by the connection to the inland waterway network that facilitates narrowboat access.
- Anecdotal evidence suggest that there have been challenges in getting the third-party operator (on a long lease) to commit to the necessary level of investment in maintenance and upkeep of essential assets
- The berthing tariffs and structures applied in Liverpool Docks suggest that there is scope to increase berthing rates and broaden the number of berthing tariff categories to reflect the different access to services and facilities.



# Liverpool South Docks












MARINA PROJECTS



St Katharine Docks

# Overview

St Katharine Docks located in central London, is managed by prominent marina operator IGY Marinas. The marina is of a high quality with 185 fully serviced berths for vessels up to 40m across three interconnected basins. The marina is set within the heart of a mixed use development with F&B, retail, offices and residential properties.

Prior to 2015, St Katharine Docks was a failing marina business in poor condition having gone through several ownership changes and a lack of investment. Following a period of investment, marina redesign and improved operational management the marina is now a successful and in demand marina.

In addition to its core function as a marina for annual berth holders and visitors, the marina also hosts a number of maritime events such as the Classic Boat Festival, strengthening community engagement and attracting visitors year-round.

The lock operates 2 hours before and 1 and a half hours after high water (London Bridge). Requests to lock out must be made the day before and to optimise locking times, the marina prefers to group yachts together.

There is a pontoon outside the marina for vessels waiting to lock in. Vessels may be required to raft during busy periods or tie up starboard to the wall.



# St Katharine Docks Facilities

The existing facilities at St Katharine Docks are summarised in the table below.

| | Year Built | Max LOA | Essential Pontoon Services* | Boatyard | Crane (Tons) | Travellift (Tons) | Storage Ashore | Slipway | Fuel | Pump out | Parking | Laundry | CCTV / Security | Yacht Club | Watersports Activities | Accreditation |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| St Katharine Docks | Pre-2000 | 42 | Y | N | N | N | N | N | Y* | Y | N | Y | Y | N | N | 5 Gold Anchor |

Due to its central London location and constrained space, the marina cannot offer the same facilities as larger full service marinas particularly with regards to technical services.

What is notable however, is that despite the relatively modest provision of services, the marina is in high demand and enjoys very high to full occupancy. This indicates that not all facilities have to be present at a marina to be successful. The key to St Katharine Docks appeal lies in the quality of its facilities and surrounding infrastructure, which is reflected in the high quality vessels berthed at the marina.

All berths have walk-ashore access via finger pontoons with secure access from the landside.

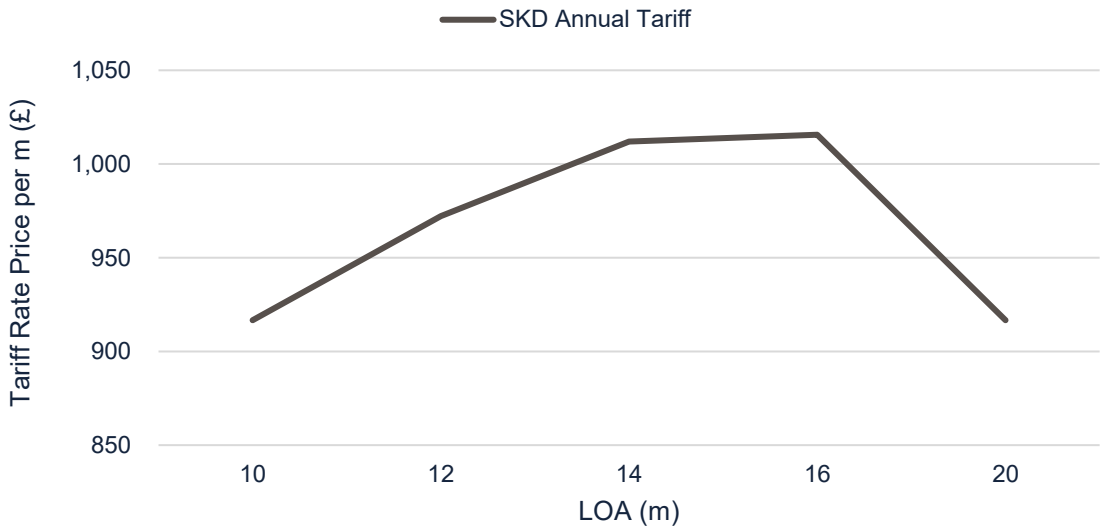
It is also important to recognise that the marina benefits from a prime central London location, with proximity to many prominent attractions further enhancing its appeal.

*Fuel is available from Thames Marine Services available 500m downstream of the lock entrance. They will visit the marina by prior arrangement.

N = Absence or unable to confirm presence of facility | *Essential Pontoon Services includes water, electric, customer facilities and Wi-Fi

# Annual and Daily Tariffs

## Annual



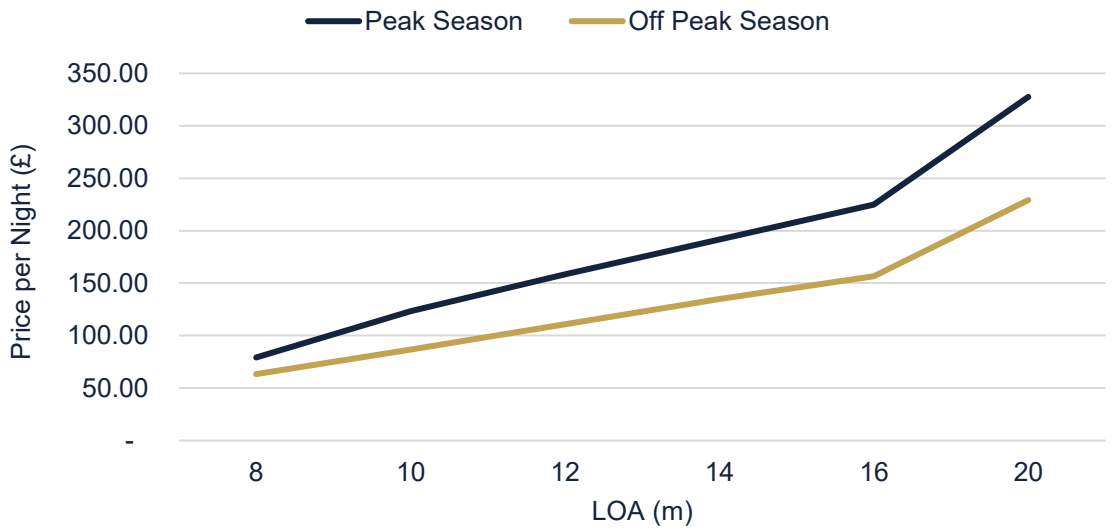

The annual visitor rate is significant within the UK marine leisure market and based on our industry knowledge, is comparable with premium marinas in the Solent (south coast), widely regarded as the epicentre of boating in the UK.

This reflects its prime central London location, its setting within a high end mixed use development and its high quality facilities and marina infrastructure.

It is notable that the tariff structure appears to be a partial stepped tariff and does not fully account for the three dimensional aspect of vessels. For example, 20m vessels are charged less per meter than 14-16m vessels, despite occupying more waterspace area and using a greater amount of the infrastructure and facilities.

The pricing structure for Bristol could consider the introduction of stepped tariffs. This will be reviewed as the financial overview is developed.

## Daily




The marina's daily tariffs operate a price per night structure with peak (Apr – Sept) and off peak (Oct – Mar) rates, recognising the seasonality of the UK boating market.

Interestingly, for daily tariffs, the marina recognises vessel length and applies a stepped tariff (price increases in line with vessel length), an approach that contrasts with the annual pricing structure.

A 25% surcharge is applied to charter, commercial and high usage vessels. The term 'high usage' likely refers to liveaboard vessels.

The marina also offers weekly and monthly rates but for the purposes of comparison with Bristol Harbour, only daily is discussed.

# Lessons Learned & Critical Factors

The following summary outlines some key similarities between St Katharine Docks and Bristol Floating Harbour :

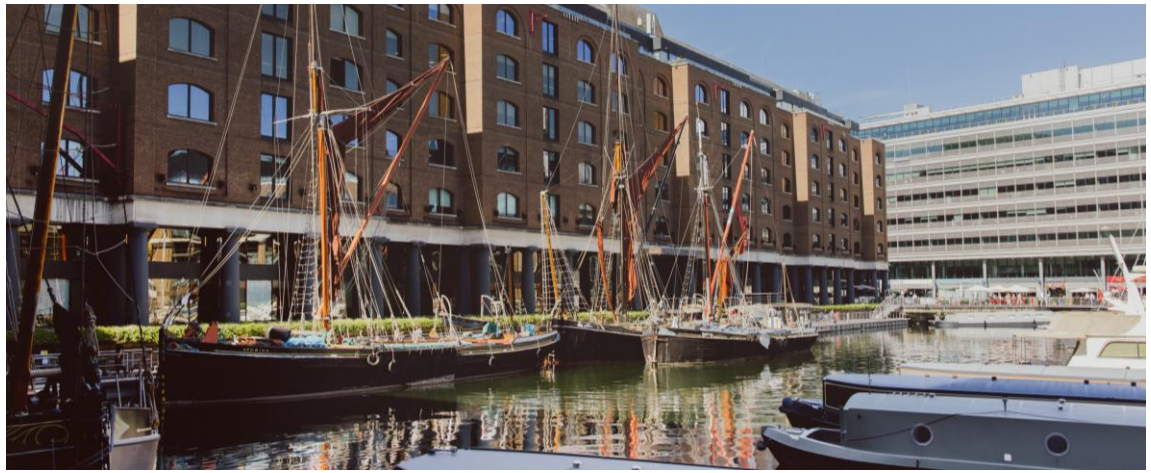
- A historic waterfront, originally used as a commercial dock to manage increasing cargo volumes. The site was redeveloped in the 1970s into a residential and leisure complex, following a similar trajectory as Bristol Harbour.
- Located in a prime central London location, it benefits from proximity to cultural attractions, retail, and food and beverage outlets, creating an environment comparable to Bristol Harbour with many of the same amenities.
- The marina accommodates a combination of vessel types and activities (leisure and liveaboard). The marina also has a number of commercial liveaboards offering rented accommodation in the marina. A model Bristol Harbour is interested in expanding.
- An active calendar of boating events, including the Classic Boat Festival and Clipper Race Yacht Tours, promotes the marina's historic character and boating heritage, similar to the Bristol Harbour Festival and heritage vessels.

St Katharine Docks has faced operational and financial challenges previously. Its current success has been achieved through a holistic improvement programme resulting in the following outcomes:

- Increased revenues and P&L improvement
- Reconfiguration and modernisation of the pontoon infrastructure and utilities that enabled higher berthing rates that reflect a premium product
- Better utilisation of the waterspace and increased flexible berthing creating more revenue generating space
- Attracted new commercial, retail and F&B tenants with the marina providing a unique setting for tenants
- A vibrant, well managed marina has driven commercial occupancy on-shore, with increased rental values
- Growth of berthing renewals and occupancy
- An operational review improved operational practices, cost controls, management systems and customer service
- The reconfiguration improved security, accessibility and aesthetics.
- Preservation and adaptive re-use of historic / heritage buildings retains site identity



# St Katharine Docks Images



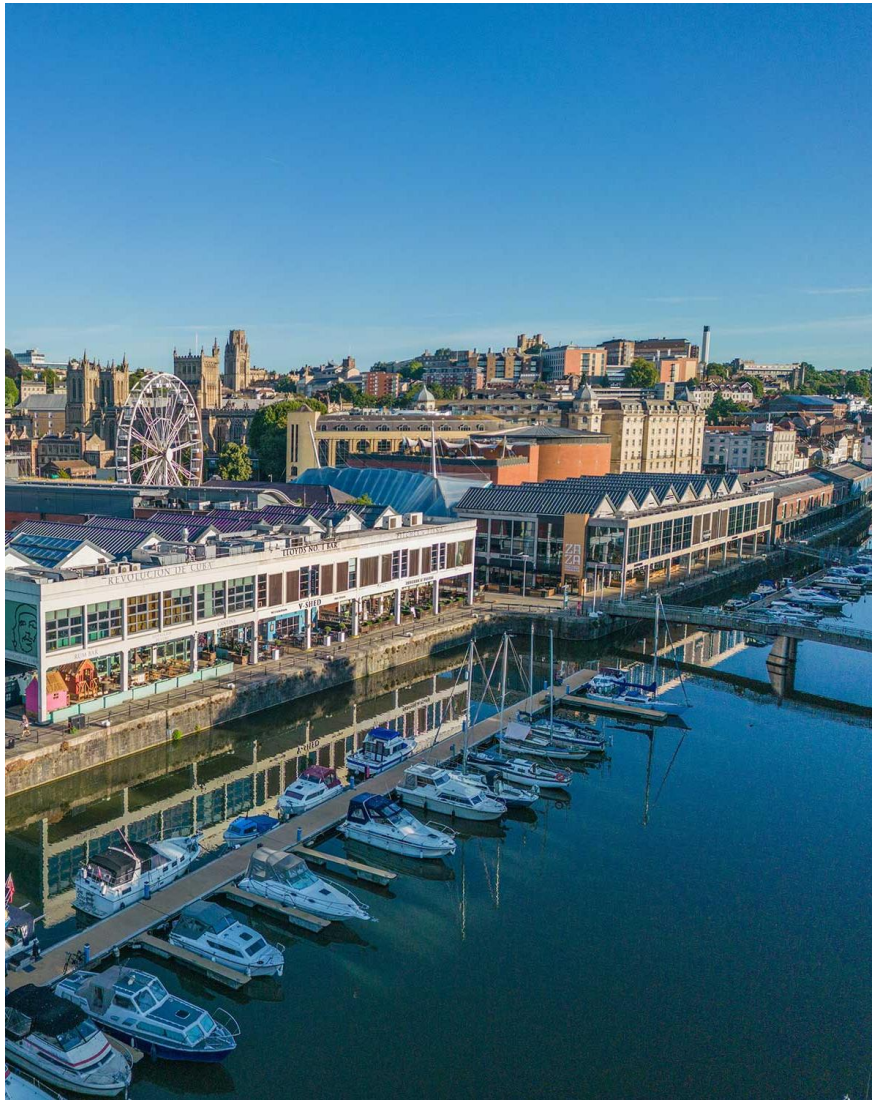









# Section 5 – Market Summary & Recommendations



# Market Summary: Local Market

The key observations from the market study are as follows:

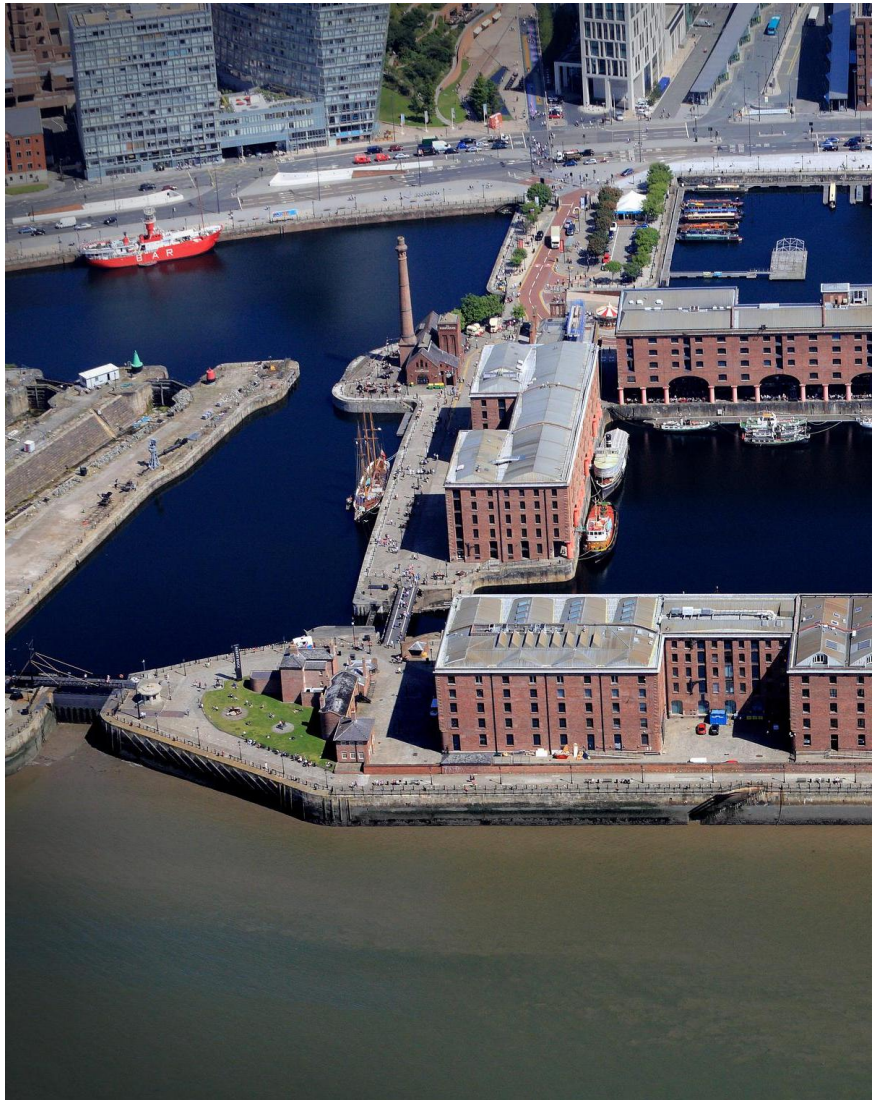
- Bristol Harbour accommodates a wide range of vessel types and activities, moored across multiple locations. Opportunity exists to create a more coordinated arrangement across the Harbour that better responds to adjacent landside uses and minimises any potential conflict between user groups.
- Vessels are predominantly 12m & below, reflecting the typical leisure boating profile for the region. A secondary group comprises vessels 15m – 20m reflecting the narrowboat and widebeam activity, a result of Bristol's unique position between the tidal waters of the Bristol Channel and the inland Kennet & Avon Canal.
- The range of licences and associated tariffs are considered too narrow. They do not reflect the range of moorings, access arrangements, proximity to facilities and location within the Harbour.
- There are 22 vessels on the waiting list indicating a strong demand for moorings. Approximately 80% of vessels are narrowboats, widebeam vessels or barges further reinforcing demand from this user group.
- Vessels seeking reallocation, primarily cite reasons such as antisocial behaviours, limited access to facilities and the desire for secure and convenient access.
- Visitor activity in 2025 primarily arrives from the Kennet and Avon Canal. While vessel types are not confirmed, it is assumed vessel activity is likely weighted towards narrowboats, widebeam vessels and small motor vessels.
- There are 3 other marina operators in the Harbour, all with very high occupancy demonstrating the high level of demand for moorings. Their vessel mixes align well with Bristol Harbour, further reinforcing the market as primarily a combination of small leisure vessels, narrowboats, widebeam vessels and barges.
- There are a large number of water recreation Clubs, commercial operators and manual propelled craft launching from slipways (as recorded by Bristol Sail). While these groups generally do not use traditional pontoon moorings, they represent an important segment to consider in future planning and management strategies.
- Customer facilities are limited both in terms of quantity and locations in the Harbour. They are generally of a mid to low quality standard.
- Parking and accessing moorings is a challenge for mooring holders with limited drop off availability.

# Market Summary: Regional Market

The key observations from the market study are as follows:

- The regional market comprises two distinct areas: coastal and inland, each with different boating activities and therefore differing marina characteristics. This distinction also reflects the diverse range of vessels present in Bristol Harbour.
- Swansea Marina, Penarth Marina, and Cardiff Marina each have comprehensive infrastructure (boatyards, technical services and shore amenities) supporting a range of vessel types and sizes, serving as useful benchmarks for Bristol Harbour.
- In contrast inland marinas have fewer facilities, but they focus on the requirements of canalboat users, providing a useful reference for Bristol Harbour's narrowboat and widebeam vessel population.
- The coastal market is comprised of mostly day boats and small cruising vessels, reflecting the unique tidal conditions of the Bristol Channel.
- The inland market better reflects Bristol's own vessel mix with a combination of vessels largely 10m & below and a concentration of 15m – 18m vessels which are typically narrowboats and widebeam vessels.
- Occupancy in both coastal and inland markets is very high demonstrating the popularity of boating in the region.
- There are a large number of yacht, sailing and paddlesports (rowing, canoe, SUP) Clubs, further demonstrating the high levels of boating and watersports participation in the region. These Clubs present opportunities to foster relationships, attracting visitor activity to Bristol.
- There is limited boatyard and refuelling services in the regional market with many located in major urban and boating hubs. There are fuel and boatyard services at Portishead Marina and Bath Waterside (fuel only) which are the nearest facilities outside of Bristol. It is likely these complement the support services at Bristol Harbour.
- There are a range of tariffs in the coastal market with a clear distinction between Club-run marinas and commercial operators.
- Watchet Marina is a close comparator to Bristol Harbour. Despite operational issues and shorter tidal access, tariffs are priced higher than Bristol Harbour indicating there is scope to increase tariffs.
- While it has not been possible to obtain tariffs from many of the inland marinas, the approach of pricing by different vessel type, could be considered for Bristol Harbour.





# Wider Market Benchmark Summary

The key observations from the market study are as follows:

- There is significant demand for annual and liveaboard berths at both Liverpool and St Katharine Docks, largely driven by a City Centre location. This reflects the demand in Bristol Harbour and ratifies the aspiration by Bristol Harbour to target this market segment.
- The use of different tariff rates based on vessel type, usage (i.e. commercial) and serviced or unserviced berths is an established practise within the wider marina leisure market and has good applicability to Bristol Harbour.
- St Katharine Docks applies a surcharge to high usage vessels which is understood is a term used in place of ‘liveaboard’. This supports the potential adoption of the “high-usage” terminology at Bristol Harbour, as it is accepted practice in an established, high-profile marina.
- Both benchmarks use a combination of linear and partially stepped tariffs for their annual rates. Neither approach fully reflects the three dimensional characteristics of vessels or the greater demands that larger vessels place on waterspace, infrastructure and facilities.
- However, St Katharine Docks applies a fully stepped tariff to its daily rates, which is typical in mature marine markets such as the Solent and is familiar to modern boaters. The pricing structure for Bristol could consider the introduction of stepped tariffs.
- A comprehensive package of investment covering infrastructure, operations and management practices, transformed St Katharine Docks. The marina is now a vibrant, commercially successful destination with improved revenues, strong on shore commercial occupancy and increased landside activity.
- Where third party operators are involved, active oversight may be required to ensure essential Harbour assets are well maintained, meet user needs and contribute to the overall character of the Harbour.



# Recommendations

## Tariffs

- Introduce a broader range of leisure berthing tariffs that reflect the serviced/unserviced nature of berths, the type of moorings (pontoon/quay wall), type of vessel, access arrangements and security, proximity to facilities and location in the Harbour and proximity to landside amenities.
- Introduce simplified commercial fees and Harbour dues. A more balanced pricing structure would reduce barriers for activity and increase revenue opportunities.
- An evaluation is required of the social value initiatives around the Harbour to ensure they operate at least on a break-even basis, covering their costs and not creating additional expenditure for the Harbour.
- Carry out an audit of all vessels in the Harbour to ensure they hold the correct licence. This is particularly relevant for vessels that are used for residential purposes but may currently hold a leisure licence.
- Opportunities to explore alternative commercial income streams associated with new usages, such as floating accommodation, saunas, etc.
- Consider introducing stepped tariffs to reflect the greater waterspace, infrastructure, and facility demands of larger vessels.

## Licence

- Introduce a broader range of licences to reflect the different types of vessels and their usages in the Harbour i.e. passenger vessels, heritage vessels, etc.
- The legal risk associated with the liveaboard licence and whether a high usage licence is more appropriate to protect both the berth holder and the Harbour.
- Transition all commercial vessels onto agreements that are performance linked and based upon turnover, once contracts are up for renewal.

# Recommendations

### Facilities

- Introduction of new facilities in strategic locations throughout the Harbour that meet the requirements of differing user groups and unlock increased berthing tariffs.
- Refurbishment and modernisation of existing facilities. Where possible expand facilities to better meet demand.

### Rezoning

- Reorganisation of the Harbour to better align vessel activity with landside uses.
- Introduction of new mooring areas, with a primary focus on vessels used for residential purposes alongside a proportion allocated for leisure vessels. Key locations include the Temple Quarter regeneration and the Feeder Canal.
- Consideration to demand on boatyard services, wastewater facilities, and fuel station with introduction of increased moorings.
- Create dedicated visitor mooring areas that can also be used as winter moorings during the off season.
- Consideration should be given to establishing dedicated mooring holder zones within existing car parks and introducing a greater range of short term drop off/pick up options.
- Creation of dedicated facilities for watersports, particularly for manually propelled craft such as low freeboard pontoons and shoreside facilities.
- Opportunity to introduce a greater number of cross Harbour ferry services to improve connectivity in the Harbour, particularly around Princes Wharf and the central Harbourside/amphitheatre area. Furthermore, there is an opportunity to expand the ferry stops at either end of the Harbour as the Temple Quarter and West Harbour regeneration projects are delivered.
- A pontoon condition survey could be undertaken to guide capital investment decisions, contribute to broader Harbour enhancement initiatives, and increase berthing fees.



# Appendix A – Site Visit Observations

# Appendix B – Bristol Harbour Licence Observations

# Bristol Harbour Licences

BHA have provided useful commentary regarding the various licences in effect across the Harbour, The key points are summarised as follows:

- Leisure and liveaboard licences are renewed on an annual basis and are managed by the Harbour.
- Within the leisure category, 15 vessels are ferries or passenger vessels. In addition to the standard licence fee, they also pay additional commercial charges.
- The Harbour reports that there are a number of vessels which hold a leisure licence but should instead hold a liveaboard licence.
- Consideration should be given to the use of the terms ‘residential’ and ‘liveaboard,’ as they may imply certain entitlements or services provided by the Council or Harbour.
- Property Services manage those vessels on long term licences and are categorised as commercial or residential.
- Of those vessels that hold a long term residential licence, 6 have a right to renew. The remainder do not have a right to renew, and it is the intention that they will be transitioned on to the liveaboard licence at the end of their respective terms.
- One vessel with a long term residential licence includes the provision for sub tenants.
- The majority of commercial vessels with long term licences pay an annual mooring fee. Two vessels with more recent contracts include a profit-sharing component which has received positive feedback from both the operators and the Harbour.
- There a small number of heritage vessels managed by Property Services that do not hold a licence. It is understood no charges are currently applied to these vessels.



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