Size and Characteristics of the Australian Marina Sector

Marina Industries Association of Australia
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With Support from Research Partners:
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1. Executive Summary

The objectives of this 2009/10 study were to quantify the scale and basic characteristics of Australian marinas. Marinas have been defined in this report as recreational marinas including club and commercial marinas with 20 or more on-water boat storage spaces.

There are an estimated 356 such marinas in Australia. In terms of distribution of marinas New South Wales accounts for 154 or 44% of all the marinas in Australia, followed by Queensland with 19% and Victoria, Western Australia and South Australia all around 10%.

The total number of marina boat storage spaces including dry-land boat storage is 39,300. This represents approximately 5% of the estimated 800,000 registered recreational boats in Australia\(^1\). The average marina boat storage capacity is 110 boats. Just over half of all marinas (53%) have storage for between 20 and 100 boats indicating that the average marina in Australia has a relatively small boat carrying capacity.

While New South Wales has most marinas Queensland has the most marina boat storage spaces or approximately 30% of national marina capacity; followed by New South Wales with 28% and Western Australia with 16%. On-water boat storage spaces account of approximately 88% of all marina storage. Marina berths (or pens) account for just over 90% of all on-water boat storage with the balance being marina moorings. On land approximately three quarters of all marina storage is on boat trailers or similar while more sophisticated dry stack or rack and stack systems are relatively uncommon.

While the data relating to type\(^2\) of marinas was less reliable it is estimated ‘traditional commercial marinas’ that carry out a range of services account for roughly half of all marinas in Australia. Club and ‘service and repair marinas are the next most common types of marina.

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\(^1\) This estimate is derived from 2008 and 2009 boat registration data provided by various state boat registration agencies.

\(^2\) See Attachment 2 for definitions of marina types.
2. Introduction and Background

The Marina Industries Association of Australia (MIAA) is the peak industry body representing marinas, slipways, boatyards, berthing, mooring and other marine storage facilities and sailing and cruising boat clubs. MIAA focuses on the sustainable development of the marina industries through the provision of education, accreditation, research and policy development. This is done in conjunction with the State Boating Industry Associations who play an active role in supporting marinas, particularly with respect to State regulatory and planning matters.

MIAA identified the lack of data about the profile and characteristics of marinas in Australia as a fundamental barrier to further research and development of the marina industries. The aim of this report is to quantify the key characteristics of marinas in Australia in terms of size, location and type. The report also identifies further research opportunities to expand on our understanding of marinas in Australia and the wider Asia Pacific region. Additional to this report is the work being conducted for MIAA and partners by Dr Ed Mahoney on the economic and employment value of marinas in Australia. The two reports will add significantly to our understanding of the marina sector in Australia.

3. Objectives and Methodology

The objective of this report is to quantify the size of the marina sector in Australia in terms of number of marinas, location by state, boat storage capacity and type of storage and type of marinas. Any additional data that was gathered (excluding economic and employment data) that adds to the understanding of the size of the marina sector in Australia was also to be added to the report.

In May 2009 a PHD student from Macquarie University was engaged for 70 hours to gather data as a desk top research exercise for this report. This data was subsequently checked and

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3 Over 85% of the major Australian marinas are members of MIAA. MIAA is attracting a growing number of members from the wider Asia Pacific region and the Middle East.

4 Dr Ed Mahoney is a professor and industry extension specialist at Michigan State University and a co director of the Recreation Marine Research Centre. Dr Mahoney and MIAA have agreed to conduct a three year study to quantify the economic and employment value of marinas in Australia.
additional data gathered by a suitably qualified industry contactor\(^5\) mid 2010 and the final report completed by the MIAA Executive Officer October 2010. As part of the desk top research a variety of state and national references, lists and directories were used -see Attachment 1. Phone calls were also used to verify data.

The criteria used for marinas\(^6\) counted in this study were that they have a minimum of 20 on-water boat storage spaces either wet berths (or pens as they are called in Western Australia) or moorings. On-land or dry land boat storage spaces were also counted as part of the overall analysis and reported on in the study. In around 15 instances marinas with slightly less than 20 on-water boat spaces (and mostly with dry land storage) were included in the study as they were deemed be a functioning marina enterprise with at least one full time equivalent marina position.

The collection of data for boat storage for this study focused on recreational marinas but it is noted there are a number of commercial fishing marinas that also accommodate recreational boats for casual or longer term berthing or mooring. Data from these marinas has not been included in the study. The study also did not include private berths, moorings or dry land boat spaces not managed by marinas. It is noted this number is significant in some locations: e.g. canal estate berths on the Gold Coast and south of Perth and NSW Maritime moorings in Sydney Harbour.

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\(^5\) Kerry Ellis: BA Hons Maritime Leisure Management 2002, work CV includes UK and NZ marina industries.

\(^6\) Dictionary definitions of marina include: 1. Area of water for small private boats. An area of water beside the land, that is designed for keeping small private boats in: 2. A harbour specially designed to cater for pleasure boats and their owner.
4. Findings

4.1. Number of Marinas Nationally and by State

The study identified there are 356 marinas in Australia. The study indicates the percentage breakdown in terms of location (see Figure 1). 154 marinas are located in NSW which represents 43.8% of marinas in Australia. Queensland has 67 or 18.8%, Victoria 40 or 11.2%, Western Australia 36 or 10.1%, South Australia 32 or 8.9%, Tasmania 18 or 5.1%, the Northern Territory 7 or 1.9% and Australian Capital Territory 2 or .6%.

![Number of Marinas by State](image1)

4.2. Size of Marina Boat Storage Capacity in Australia.

Data was collected in the study on marinas boat storage capacity including both on-water and dry land storage. This covered floating and fixed marina berths/pens, fixed and swing moorings, dry stack and dry land boat storage attributed to marinas. It can be seen in Table 1 (see over) that the total number of boat storage spaces at Australian marinas is estimated to be 39,300. The average boat storage space per marina is therefore estimated to be 110.
Table 1. Boat Storage Capacity Figures

<table>
<thead>
<tr>
<th>Number of Marinas</th>
<th>Average of Boat Storage</th>
<th>Total Number of Boat Storage</th>
</tr>
</thead>
<tbody>
<tr>
<td>356</td>
<td>110</td>
<td>39,300</td>
</tr>
</tbody>
</table>

4.3. **Size of Marinas in Australia by Boat Storage Capacity.**

Figure 2 below indicates that the most common boat storage capacity in Australia is in the 50-100 boats range representing 29% of all marina boat storage. 24% of all marina boat storage is in the less than 50 boats range. 24% of marina capacity is within the 100-150 band and only 14% of marina boat storage is in the 200 plus range. 6% of marina boat storage is at marinas with capacity greater than 300 marina boat spaces.

![Size of Marina Boat Capacity](image)

4.4. **Marina Boat Storage Capacity Nationally and by State**

While Queensland has less than half the number of marinas than New South Wales the Queensland marinas are on average more than double the size in terms of boat carrying capacity. Although New South Wales has the greatest number of marinas (43.8%) when one analyses the boat storage or carrying capacity of marinas the picture changes significantly (see Figure 3).
As illustrated above Queensland has the largest number of marina storage spaces at 11,642. This represents 29.6% of all on-water marina boat spaces in Australia. New South Wales marinas have an on-water boat storage capacity of 11,004 or 28% of national capacity. Western Australia follows with 6,259 or 15.9% of national capacity; then Victoria with 4,753 or 12.1%, South Australia with 3,530 or 9%, Tasmania with 1,227 or 3.1%, Northern Territory 755 or 1.9% and the Australian Capital Territory 130 or 0.3%.

The explanation for Queensland’s fewer but larger marinas than New South Wales may be attributable to a range of factors including Queensland’s later development of recreational boating marinas including those on relatively large ‘green field’ sites.

4.5. **Segmentation of On-Water and Dry-Land Marina Boat Storage**

Analysis indicates that marina on-water storage (wet berths and moorings) are the dominant form of boat storage associated with marinas. Figure 4 shows that 88.2% of the boat spaces are on-water whereas 11.8% are on land.
Analysis indicates that wet berth or pen storage is by far the most common type of on-water boat storage in Australian marinas as opposed to swing or fixed moorings. It is estimated that 92% of on-water boat storage at marinas are marina berth spaces and only 8% of spaces are on swing or fixed moorings.

The vast majority (72%) of dry-land boat storage spaces are boats stored on trailers or with simple supports; as opposed to more sophisticated rack and stack/dry stack systems. It is noted that industry expect significant growth in more sophisticated dry stack storage systems into the future as has been evidenced in the USA and parts of Europe.

4.6. Marinas by Type

The survey has not fully met the objective of quantifying the breakdown of Australian marinas by type. With respect to a key categorization of club and commercial marinas the following general assessment has been made but it should be noted there is some overlap with this categorization. Some club marinas host more than one sailing club and some commercial marinas have club marinas operating from within their marina.
The Yachting Australia web site lists 382 affiliated yacht clubs in Australia. Analysis indicates the vast majority of these do not meet the marina definition for inclusion in this study. For example many have no on-water boat storage and have ramp or ‘off the beach’ launching; are inland clubs again without on-water boat storage, are clubs such as Sailability QLD that operate within a marina, or are administrative in nature such as Yachting NSW. Of the 382 clubs on the list 61, or 16%, appear to meet this studies definition of a marina. From analysis of the data on the 356 marinas counted in this study, 61 are club marinas and therefore as per Figure 5, 17% of marinas in this study are classified as club marinas.

Figure 5

<table>
<thead>
<tr>
<th>Commercial and Club Marinas in Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>N = 356</td>
</tr>
</tbody>
</table>

The analysis by more detailed marina type as per the definitions in Attachment 2 is less reliable. The researchers encountered significant issues in applying the definitions with the data they had available. While the club and to a lesser extent residential marina type were easy to categorize the four other marina types were more difficult to categorize on the evidence available. Therefore the data in Figure 6 should be considered as not definitive and interpreted with caution.
5. **Recommendations**

5.1. The study highlighted the lack of an effective centralized data base and data source for marina statistics. Given MIAA’s leadership role in facilitating marina research, it is recommended that MIAA continue to build on the data set presented in this report.

5.2. The study did not quantify the total number of boats stored on-water as the study focused on marina boat storage. Government moorings, residential berths etc were not counted. It is recommended that the feasibility of this gathering this data be investigated with a view to including it when next updating this report.

5.3. The study has highlighted the need for widely agreed definitions of marinas by size and by type. It is recommended resolution of this matter be sought though MIAA prior to next updating this report.

5.4. It is specifically recommended that MIAA create a more sophisticated data base to collect marina industry data. Given the labour intensive nature of collecting this data, it is recommended that MIAA provide a mechanism for industry to update its own data within the data base (and subject to MIAA verification).
5.5. As an additional incentive for industry to provide such data, it is recommended to link part of the data on marina facilities to one or more consumer marina directories.

5.6. It is recommended that this report be thoroughly updated and widely distributed at least every three years.

6. Attachment 1 - Data Sources

Boating Industry Association of Victoria  
http://www.biavic.com.au

Boat Web  
http://www.boatweb.com.au

Department for Planning and Infrastructure Western Australia  
http://www.dpi.wa.gov.au

Report on the Western Australian Marine Industry: Edith Cowen University 2010

Marine Queensland Member Directory  
http://directory.marineqld.com.au

Maritime Safety Queensland marina data base listings 2009

Queensland Department of Transport marina infrastructure records 2009

NSW Land and Property Management Authority marina data base listings 2009

NSW Maritime marina data base listings 2009

Department of Planning New South Wales  
http://majorprojects.planning.nsw.gov.au

Tasmanian Government Boating Statistics Annual Report

Australian Marina Guide  
http://www.marinasguide.com.au

My Boat  
www.myboat.com.au

NSW Marine Directory  
http://www.marinedirectory.com.au

Portbooker  
http://www.portbooker.com
7. Attachment 2 - Survey Definitions of Marina by Type

Yacht Club Marina
Club that operates in a traditional committee/membership manner and contains marina berths/moorings. Club house with amenities, food and beverage, but with or without repair facilities/poker machines.

Tourism/Accommodation Marina
Provides short term accommodation adjoining the marina with food and beverage, plus possible retail.

Retail Marina
Marina with associated retail outlets exceeding 2,000 sqm. It may or may not have haul-out repair facilities.

Traditional Marina
Marina with up to a maximum 2,000 sqm of retail/commercial and some haul-out/service facilities.

Service & Repair Marina
Some berthing plus some commercial/retail but primarily a service/haul-out facility. Minimum haul facility and hard stand to accommodate a minimum of 300m of vessel with associated services.

Residential Marina
Provides free hold or strata title permanent accommodation adjoining the marina.