

The UK Marina & Moorings Market, 2025

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Contents

Introduction

- Contents page 2
- Glossary page 3
- Executive Summary pages 4-5

Economic Overview: The UK Marine Industry

- Revenue Trends & Consumer Confidence page 7
- UK Consumer Inflation, Household Spending & Earnings page 8

The UK Marina & Moorings Sector Structure

- Estimates of Marinas & Mooring Sites and Berths page 10
- Breakdown of Inland Marinas by Size / Waterway Area page 11
- Breakdown of Coastal Marinas by Size / Cruising Area page 12

Marina & Moorings Market Trends

- Marina & Moorings Market Performance pages 14-15
- Key Challenges to Market Profitability page 16
- Marina & Moorings Business Sentiment page 17
- Marina & Moorings Occupancy Rates page 18
- Marina Berth Size Trends page 19
- Marina & Moorings Waiting Lists pages 20-21
- New Developments & Site Upgrades page 22
- Visiting Boaters page 23

Marina & Moorings Key Sector Issues

- Decarbonisation: EV Charging page 25
- Decarbonisation: Biofuels page 26
- Abandoned & End-of-Life Boats pages 27-29
- Methodology pages 30-31

Glossary

<i>Gross Value Added (GVA)</i>	Measures the contribution to an economy of a company, sector, industry or region. Gross Value Added quantifies the value of goods and services produced, less the cost of all inputs and raw materials that are directly attributable to that production.
<i>Direct Economic Effect</i>	Measures the direct economic effect of purchases of a company's goods and/or services, measured in terms of gross value added (GVA) contribution to the economy and full-time equivalent employment supported.
<i>Indirect Economic Effect</i>	Measures the wider impact of supply chain purchases to support the provision of those goods and services, stimulating economic activity downstream in the economy.
<i>Induced Economic Effect</i>	Measures the wider impact of employees spending their wages in the local economy as a result of purchases of those goods and/or services, stimulating further economic productivity.
<i>Capacity</i>	The number of boat storage spaces advertised.
<i>Occupancy Rate</i>	The percentage of boat storage spaces that are occupied out of all boat storage spaces that are advertised.
<i>Berth</i>	A fixed bay or other space where vessels can park in the water, with direct access to land. Berths usually consist of a floating pontoon or fixed dock and are sheltered offline in a marina or harbour basin.
<i>Moorings</i>	An anchorage on the water that is inaccessible by land and requires transfer by boat. Moorings usually consist of a single anchor at the bottom of a waterway with a line running to a buoy on the surface. <u>(Note: Inland "moorings" where boats are moored adjacent to a dock, pontoon, canal or river side, with access to land, will be referred to as berths to ensure consistency.)</u>
<i>Dry Stack</i>	Storage of vessels on land stacked upon purpose built multi-level racks.
<i>Hard Standing</i>	Storage of vessels on land upon metal cradles or 'stands' to prevent deterioration during the winter and allow for the vessel to undergo refit and repair during the 'off' season.

Executive Summary

- The UK economy has been sluggish, with **GDP contracting again in October 2025 (by -0.1%), following contractions from July to September**. High costs, a weak labour market, low productivity, low business investment and ongoing trade frictions have **contributed to the UK's persistent high inflation whilst preventing the economy from sustained growth**.
- **Recent data suggests a more optimistic outlook for 2026**, however, with inflation, labour market and investment weaknesses softening and economists forecasting an increase in GDP growth to 1.4% in 2026.
- Consumer confidence sits well below its long-term average, with **outlook age-polarized between younger (25-34s), wealthy (AB) socioeconomic groups better positioned to benefit from improvements in the labour market** and **older (55+) age groups who are more sensitive to inflationary pressures and changes to the tax system**.
- **Leisure spending remains resilient for now, despite low consumer sentiment from pressure on household finances, with real wages barely above inflation (+0.5%). Sales are not even across boating markets and have been dominated by purchases of new, high-end sailing yachts**, with the more affordable pre-owned boat market in a slump.
- Overall, feedback from TYHA marina operators is that the **market is stable but softening as it recalibrates from the COVID-era highs of 2022**. The financial performance of core marina services was stable, with **operator ratings indicating marginal growth across most KPIs** (leisure berths: 3.00/5.00; residential berths: 3.18/5.00; boat sales: 3.00/5.00; boatyard services: 3.29/5.00).
- **Berth occupancy is high across TYHA members, with coastal marinas registering 96.6% occupancy rates, while inland marinas reported being 90.3% full**. Meanwhile **waiting lists have lengthened since the last survey in 2022** – since that was at the peak of the sector's post-COVID boom, when demand for marina berths was spiking, **this underscores the acute level of demand and the limitations of current marina infrastructure**.
- **Operators' sentiment towards their future prospects, however, is negative, with nearly half of respondents (49%) expecting their market to decline** over the next 12 months. Inland marinas are **slightly less pessimistic (38.1% negative) than coastal marinas (56.3% negative)**, possibly reflecting the greater demand for "liveaboard" boats and residential berths on the inland waterways.
- When asked the reason for their outlook, operators cited **falling enquiries, spiking numbers of brokerage listings and concerns about cost of living from their ageing customer base**, who are struggling to afford to keep up their boats, as well as the **intensified competition for a dwindling market**.

Executive Summary

- **With occupancy high** across most berth types and regions and **waiting lists lengthening since 2022**, it appears the UK marina market is suffering from capacity constraints in high demand regions. **Operators have complained that planning restrictions** are limiting their ability to upgrade and expand berthing capacity, with **few new build marinas recorded since COVID**.
- The sector has seen **significant consolidation in high demand cruising regions**, as businesses look to acquire competitors to maintain revenue growth and profitability. This has been **driven by an influx of private equity**, who view marinas as secure, reliable revenue-producing assets.
- With their **customer base slowly diminishing**, as living costs, ageing demographics and the lack of new entrants erodes the traditional berthing market, it seems that growth among marina operators is **more likely to come from operational optimization, including pricing and yield management, and selective acquisitions**, rather than large-scale new capacity being built. This is reflected in both the **M&A activity that we have seen in the last few years**, with private equity-led marina group consolidation, as well as some of the **capital investment schemes from major marina groups to modernise infrastructure and differentiate from the competition in a tightly contested market**.
- Despite concern over decarbonisation in the marine industry, responses from this survey indicate that **demand for both EV charging or alternative fuels is virtually non-existent at TYHA marinas**, with survey respondents rating the level of demand <1.00 out of 5.00. Indeed, **the most prominent barrier to DC charging cited by members was customer demand (98%), not the expense of installing it (57%) or difficulties with local electricity supply (45%)**.
- **The issue of “End-of-Life” or abandoned boats was cited by members as one of the greatest challenges facing the marina market**, next to the question of future customer retention (see above). **57.4% of marinas were highly concerned with this issue**, while **59.4% had had at least one boat abandoned at their site over the last 12 months**.
- **On average, 2.35 boats were dumped at those member marinas annually**. Based on these figures, it is estimated that **approximately 990 boats were abandoned at UK marinas last year**. This estimate is conservative, with **European bodies estimating that at least 1% of fleets will reach “End-of-Life” each year – equivalent to over 5,000 boats in the UK**, based on the last available boat ownership estimates for the UK.
- **With removal costing, on average, £1,335 per vessel** – factoring in both those vessels that can be auctioned off, and their value recouped, as well as those that need to be salvaged or sent to landfill – it is estimated that the **industry faces an annual disposal cost in excess of £1.32 million each year**.
- With marinas and harbours footing the bill for disposal, TYHA members are calling for Government to take charge in funding and managing disposal. Suggestions include **developing an expanded network of recycling facilities**, introducing a **comprehensive registration scheme to monitor at risk vessels and ensure accountability among owners** and monitoring of vessels, as well as a **sales tax through the lifetime of the vessel, which can be used to pay for the cost of future disposal, distributing the expense amongst successive owners**.

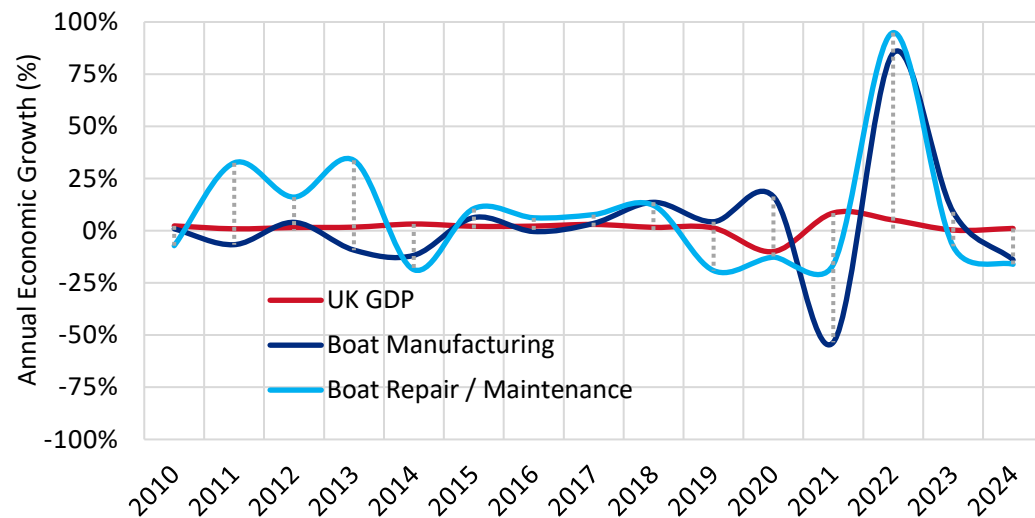
Economic Overview: The UK Marine Industry



Revenue Trends & Consumer Confidence

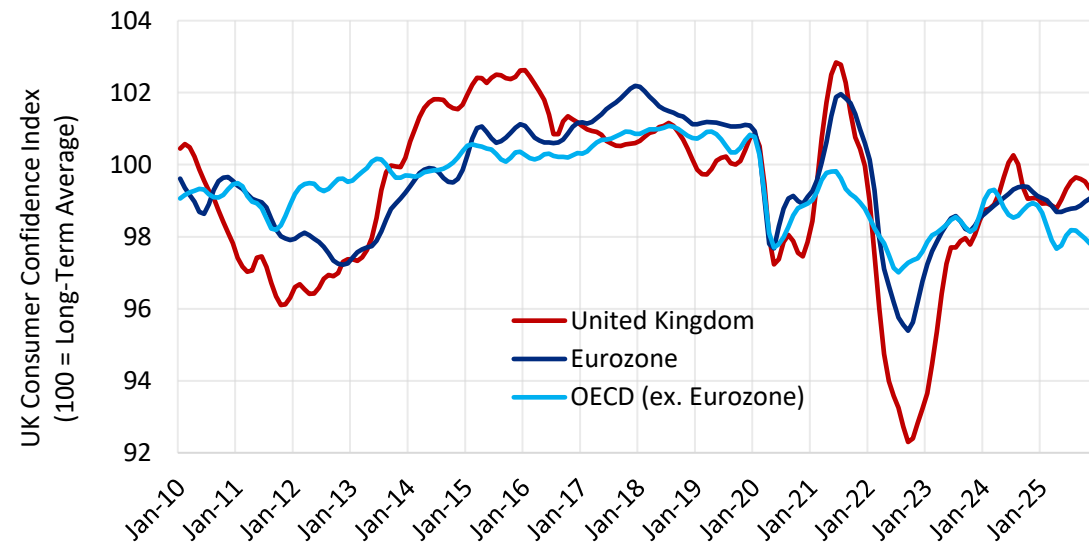
UK GDP has been sluggish in the face of a combination of high costs, weak investment, labour shortages, low productivity and trade frictions that have led to **persistent inflationary pressures and slow growth**. While the UK marine industry enjoyed a **robust post-COVID recovery**, the market has since undergone a **recalibration, with demand returning to pre-pandemic levels and manufacturing output beginning to contract in the face of economic and geopolitical headwinds**. UK consumer confidence has improved but sits well below its long-term average, with **persistently high prices and weak economic outlook driving sentiment down, particularly among the older consumers that form the bedrock of the marine industry's customer base**.

UK GDP & Marine Industry Manufacturing Trends*



Sources: Office for National Statistics, GDP year-on-year growth, chained volume measures, seasonally adjusted; Office for National Statistics, UK Manufacturers' Sales by Product Survey (PRODCOM), SIC 3012 (Building of Pleasure and Sporting Boats) & SIC 3315 (Repair of Pleasure and Sporting Boats)

UK Consumer Confidence



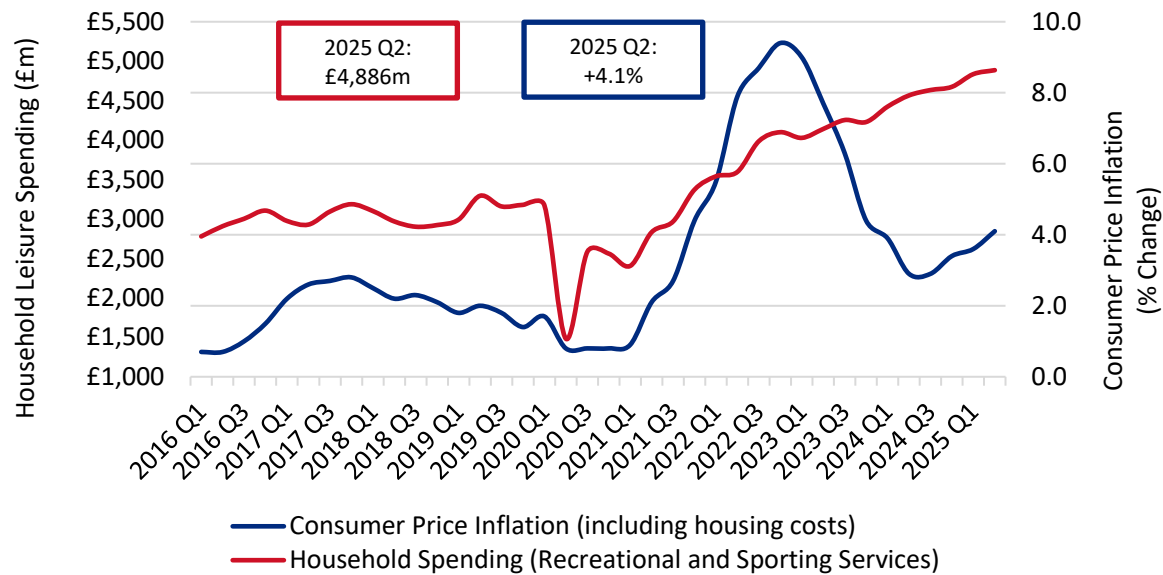
Source: OECD, Consumer Confidence Index, monthly, including United Kingdom, Eurozone countries (19) and other OECD countries (excluding Eurozone and UK);

*Note: In earlier editions of this report, marine industry revenue data and business confidence was sourced from British Marine's industry surveys. Since these surveys are no longer produced regularly, this data has been omitted from this report. No equivalent business confidence data is available for the marine industry. However, revenue trends data has been replaced with data from the ONS's PRODCOM survey, tracking sales from leisure boat manufacturers and repairers. Sales for marinas are not available in this dataset.

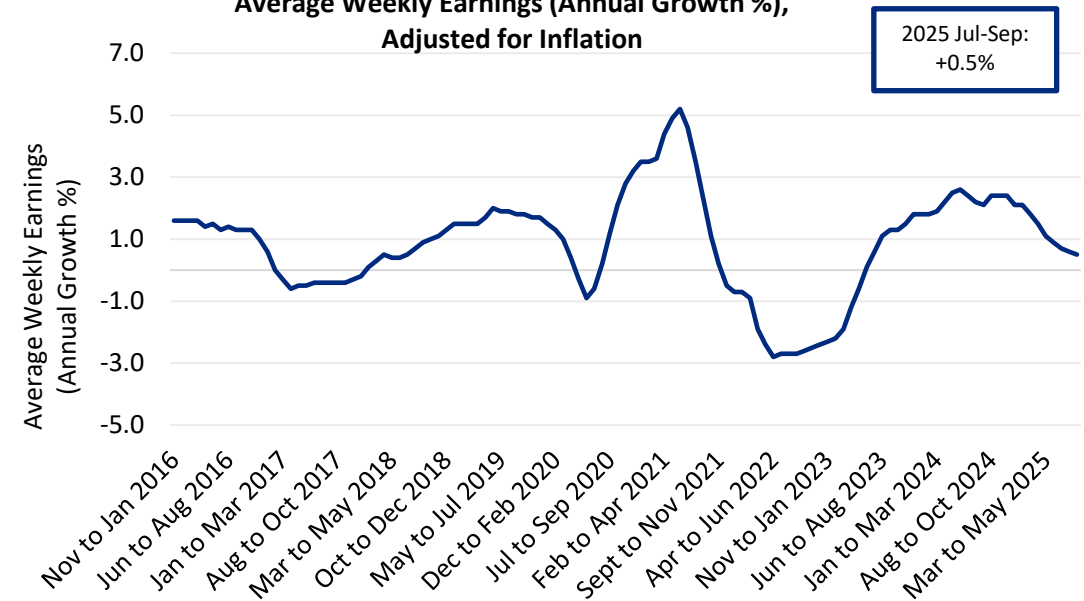
UK Consumer Inflation, Household Spending & Average Earnings

From 2016 to mid-2025, household leisure spending has steadily increased, reaching £4.89 billion in Q2 2025, despite elevated consumer price inflation (CPI), which stood at 4.1% in the same quarter. This suggests **resilient discretionary spending, even amid cost pressures**. However, the second chart shows that **average weekly earnings growth—adjusted for inflation—has weakened significantly, falling to just +0.5% in Q3 2025**. This indicates that **real wage growth is barely keeping pace with inflation, potentially eroding purchasing power and contributing to long-term consumer strain**.

Household Leisure Spending & CPI



Average Weekly Earnings (Annual Growth %),
Adjusted for Inflation



Source: Office for National Statistics, Household Spending, Recreational and Sporting Services (£m, current prices, seasonally adjusted); Office for National Statistics, Consumer Price Index (quarterly annual change (%)); Office for National Statistics, Average weekly earnings annual growth rates in Great Britain, seasonally adjusted, January to March 2001 to July to September 2025.

The UK Marina & Moorings Sector Structure



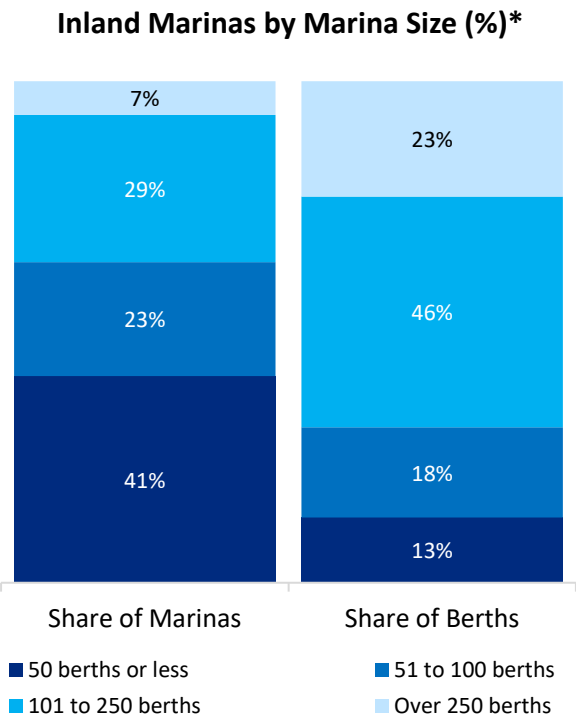
Estimates of Marinas & Mooring Sites and Berths

Region	Marinas*						Berths					
	Inland	%	Coastal	%	Total	%	Inland	%	Coastal	%	Total	%
South West	17	4.3%	61	19.1%	78	10.9%	2,329	5.7%	11,769	19.0%	14,098	13.8%
South East	85	21.6%	96	30.0%	181	25.4%	8,709	21.4%	20,431	33.1%	29,140	28.5%
London	11	2.8%	8	2.5%	19	2.7%	962	2.4%	691	1.1%	1,653	1.6%
East of England	57	14.5%	37	11.6%	94	13.2%	4,946	12.2%	6,028	9.8%	10,974	10.7%
East Midlands	56	14.2%	2	0.6%	58	8.1%	7,919	19.5%	110	0.2%	8,029	7.8%
West Midlands	70	17.8%	0	-	70	9.8%	6,757	16.6%	0	-	6,757	6.6%
North West	56	14.2%	6	1.9%	62	8.7%	5,830	14.4%	1,460	2.4%	7,290	7.1%
North East	0	-	10	3.1%	10	1.4%	0	-	1,777	2.9%	1,777	1.7%
Yorkshire	29	7.4%	5	1.6%	34	4.8%	1,798	4.4%	925	1.5%	2,723	2.7%
Wales	5	1.3%	19	5.9%	24	3.4%	580	1.4%	4,963	8.0%	5,543	5.4%
Scotland	6	1.5%	49	15.3%	55	7.7%	595	1.5%	6,936	11.2%	7,531	7.4%
Northern Ireland	1	0.3%	22	6.9%	23	3.2%	180	0.4%	2,202	3.6%	2,382	2.3%
Channel Islands	0	-	5	1.6%	5	0.7%	0	-	4,496	7.3%	4,496	4.4%
Total	393	100%	320	100%	713	100%	40,605	100%	61,788	100%	102,393	100%

Please Note:
These figures are approximate estimates of berth capacity based on British Marine's audit of available marina and planning data.

*Inland estimates only cover non-tidal rivers, canals, lakes and other inland bodies of water. For example, London's data only covers the non-tidal Thames and canals within London. Coastal estimates only cover tidal rivers and coastlines. For example, London's data only covers the tidal Thames.

Breakdown of Inland Marinas by Size / Waterway Area



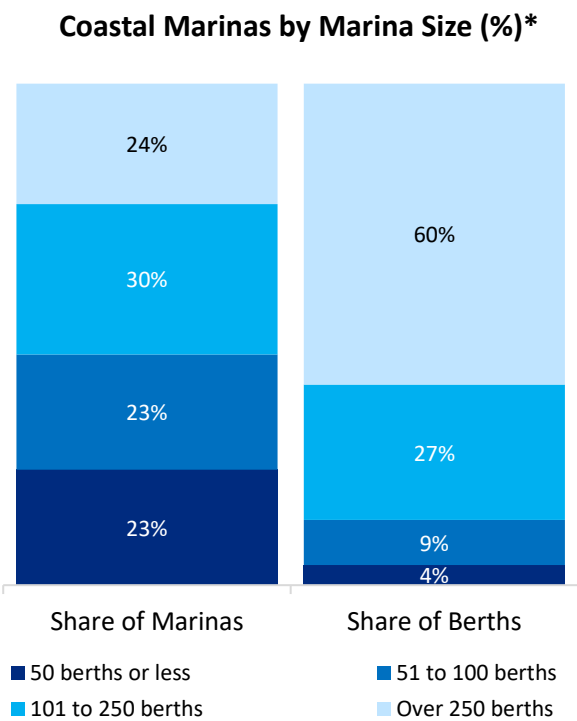
Breakdown of Inland Marina Berths by Marina Size & Navigation Authority

Marina Size	Canal & River Trust	Environment Agency	Broads Authority	Scottish Canals	Other Navigations
50 berths or less	12%	14%	18%	68%	19%
51 to 100 berths	18%	16%	28%	0%	28%
101 to 250 berths	49%	45%	43%	32%	32%
Over 250 berths	21%	26%	12%	0%	20%
Share of All Inland Berths (%)	59%	24%	7%	1%	7%

Breakdown of Inland Marina Berths by Marina Size & UK Inland Area

Marina Size	London & South East	South West (incl. Avon)	Midlands	East of England	North of England	Scotland	Wales
50 berths or less	14%	7%	11%	17%	16%	7%	0%
51 to 100 berths	15%	14%	13%	27%	27%	23%	10%
101 to 250 berths	43%	34%	52%	49%	36%	70%	90%
Over 250 berths	29%	46%	24%	7%	20%	0%	0%
Share of All Inland Berths (%)	24%	6%	36%	12%	19%	2%	1%

Breakdown of Coastal Marinas by Size / Cruising Area



Breakdown of Coastal Marina Berths by Marina Size & Coastal Area: England

Marina Size	South East (Solent)	South East (Thames to Chichester)	South West -West Coast	East of England	North West	Yorkshire & Humber	North East
50 berths or less	3%	5%	5%	5%	3%	3%	2%
51 to 100 berths	10%	13%	5%	11%	5%	0%	14%
101 to 250 berths	30%	27%	34%	33%	21%	38%	34%
Over 250 berths	57%	56%	55%	50%	70%	59%	49%
Share of All Coastal Berths (%)	17%	12%	13%	12%	3%	3%	2%

Breakdown of Coastal Marina Berths by Marina Size & Coastal Area: Other Countries / Regions

Marina Size	Scotland	Wales	Northern Ireland	Channel Islands
50 berths or less	11%	0%	11%	0%
51 to 100 berths	12%	3%	35%	4%
101 to 250 berths	22%	16%	18%	3%
Over 250 berths	54%	81%	36%	93%
Share of All Coastal Berths (%)	13%	10%	5%	9%

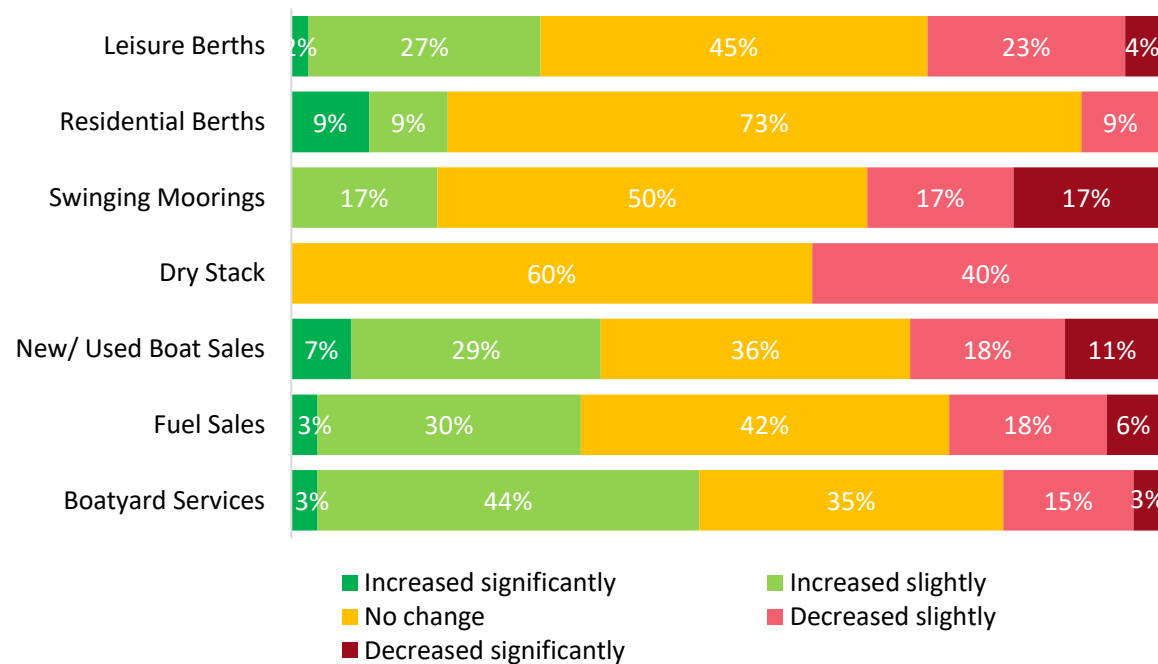
Marina & Moorings Market Trends



Marina & Moorings Market Performance

Overall, feedback from TYHA members indicates that the market is **stable but softening**, with neutral or negative growth dominating most income segments, although there are pockets of resilience, such as in boat maintenance and demand for residential berths. Both the quantitative data presented in the chart below and qualitative feedback from the survey suggest a **mixed but cautious outlook**. While some operators see stabilisation and manageable demand, many point to **economic pressures, reduced enquiries, and structural shifts in boat ownership** that are having an effect on sales performance.

How have the following markets performed compared to 12 months ago?

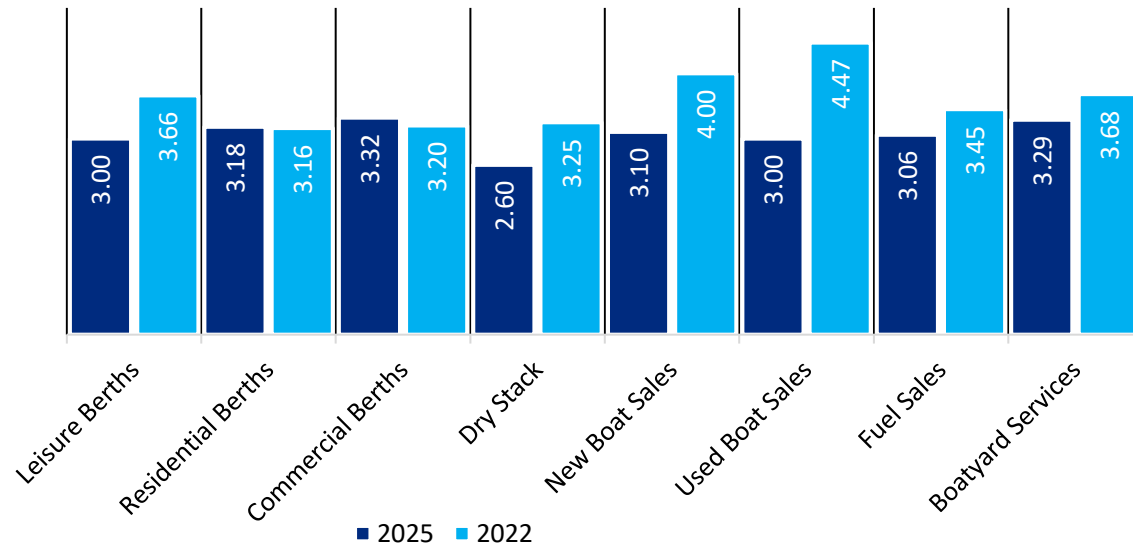


- **Market is stabilising after Covid/Brexit volatility:** operators note that numbers have “stabilised post-Covid and Brexit” and that the market is undergoing “recalibration”.
- **Demand is softening across leisure segments:** there have been fewer enquiries and declining applicants, which aligns with the “no change” / “decrease” pattern in the chart on the left.
- **Economic pressures are suppressing growth:** high costs, weak economy, and boat prices are constraining demand.
- **Residential demand remains resilient:** high rental costs are pushing more people to live aboard boats, supporting residential berths.
- **Boatyard services are a bright spot:** this is the only segment with a clear positive skew.

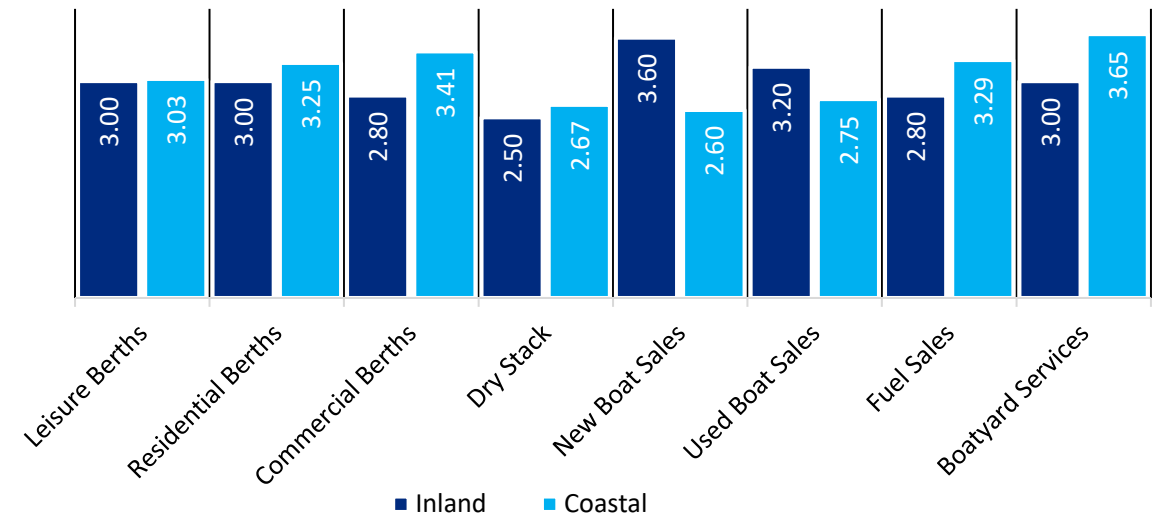
Marina & Moorings Market Performance by Segment

Business performance in the UK marina market **declined across most segments between 2022 and 2025**. Overall, mean scores declined noticeably for leisure berth, dry stack, and new and used boat sales, reflecting **cost of living challenges** for middle-income consumers as well as a **correction in demand following the pandemic-era peak in 2022**. Residential berth demand also remain consistent, reflecting **continued demand for liveaboards in the face of high rental and house prices**. Traditional essential services like fuel and boatyard services also remain strong, and closer to 2022 highs. When looking at marina types, **coastal marinas generally outperform inland sites**, especially in **commercial berths and boatyard services**, underlining the stronger (charter) tourism dynamics of coastal destinations, as well as the higher maintenance requirements of coastal, seagoing vessels. Inland sites reported higher new and used boat sales, reflecting a **stabilisation in prices** post-pandemic as well as **strong demand for liveaboards on the inland network**.

Business Performance Trends, 2022 v 2025
(Mean Score: Min=1, Max=5)



Business Performance 2025: Inland v Coastal Marinas
(Mean Score: Min=1, Max=5)



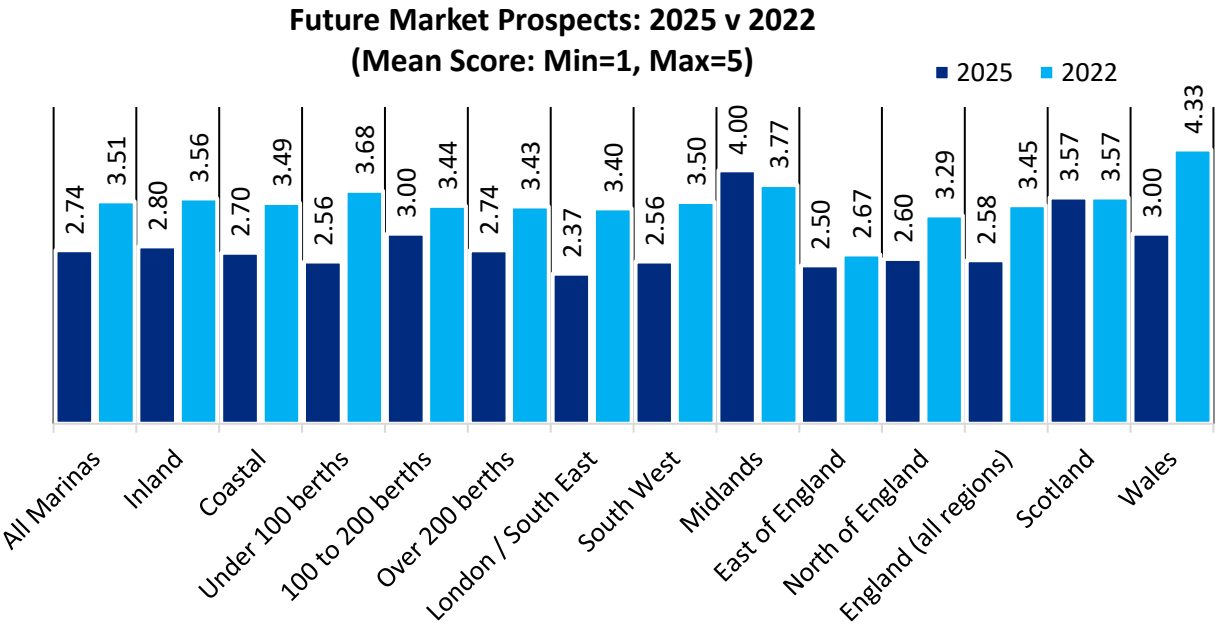
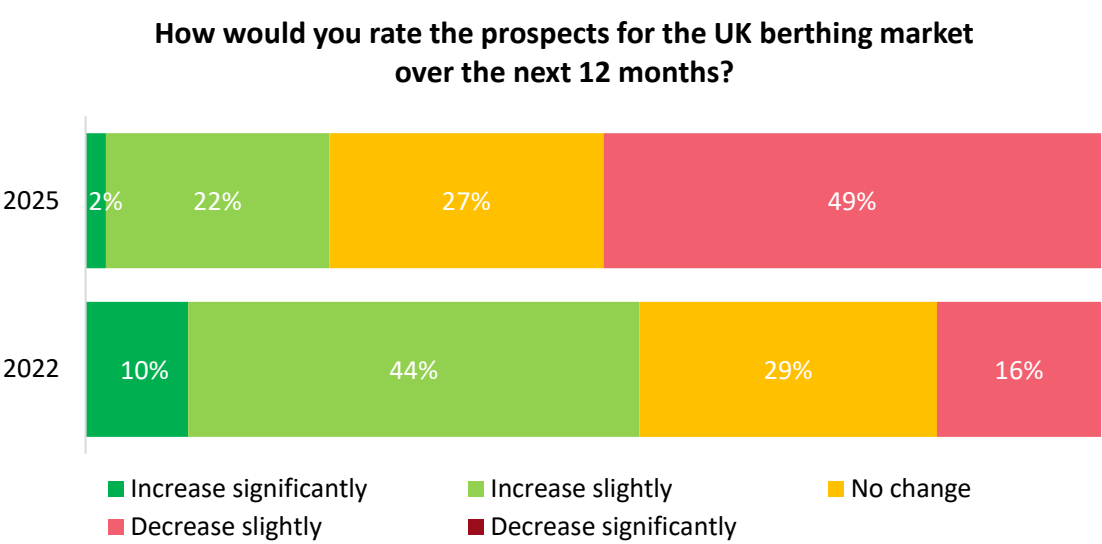
Key Challenges to Market Profitability, 2022-2025

In the last survey (2022), the UK marina market was enjoying the benefits of a **pandemic-era surge in demand** but also had to contend with **continued volatility** in terms of supply constraints and inflationary pressures affecting the market. By 2025, the picture has **shifted to a weaker, more cautious consumer base**, with challenges to **affordability, ageing demographics and fewer new entrants**, environmental **constraints affecting capacity and operations** and a need to work harder to attract and retain customers. The **tone in 2025 is more pessimistic** and structural, suggesting deeper long-term challenges for the marina and moorings sector.

Key Issue	Description
1. Economic Pressures & Cost of Living	This is the single most dominant theme across responses. Many respondents highlighted rising living costs, reduced disposable income, and general economic uncertainty as major threats. This is squeezing lower-income boaters, reducing demand for berths and weakening consumer confidence.
2. Demographic Shifts & Participation Decline	Several comments point to continuing demographic shifts in the market that presage a crisis in participation. These highlight the current ageing population of boat owners, the lack of younger generations entering the market and the increasing number of older boaters retiring from boating due to financial pressures.
3. Environmental & Waterway Conditions	Respondents mention issues directly affecting navigability, access, and operational reliability for their customers, including low water levels, canal closures and poor water management (primarily inland marinas).
4. Operational & Infrastructure Issues	A few respondents raised concerns about issues creating operational inefficiencies and reducing available berthing, including abandoned or end-of-life boats occupying space and maintenance burdens at ageing marinas, with much of UK's marina infrastructure reaching the end of its design life.
5. Demand Generation & Customer Acquisition	Multiple responses emphasised the difficulty attracting new berth holders, particularly in areas where there is spare capacity and there is increased competition for a shrinking customer base. This ties closely to the economic and demographic themes above.
6. Bureaucracy & Regulation	Some respondents cited bureaucratic hurdles and administrative burdens that slow down operations or much needed development, feeding the berth shortages discussed elsewhere in this report.

Marina Business Sentiment: Future Market Prospects

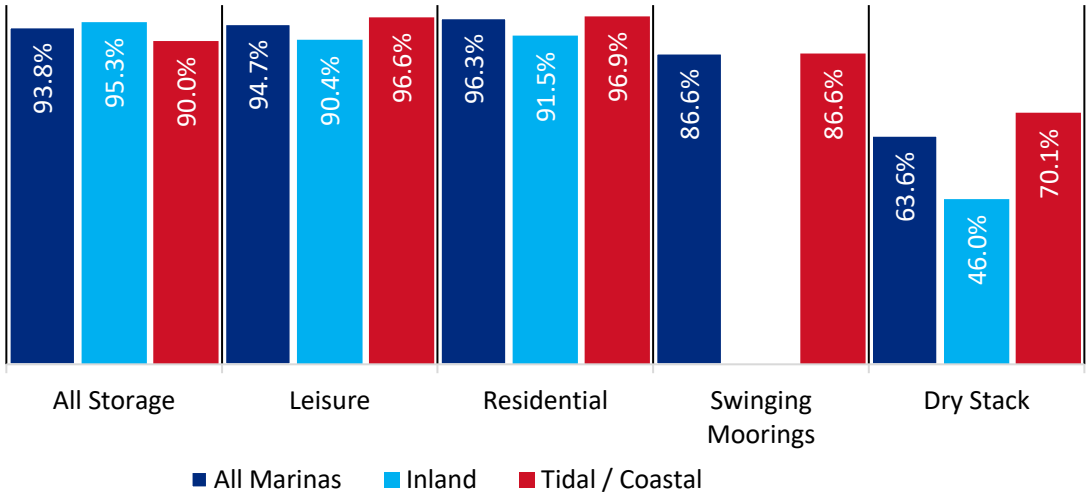
Marina operators’ sentiment regarding their future prospects has **declined significantly compared with 2022**, with **most respondents negative** about their prospects in 2025 (49% vs 16%). The share of respondents expecting conditions to improve has shrunk by more than half (54% vs 24%). Overall, confidence in future prospects, measured as a mean score, has dropped from 3.51 to 2.74, with **both coastal and inland marinas seeing similar declines**. Smaller marinas (under 100 berths) experienced the steepest fall (from 3.68 to 2.56), suggesting **heightened concern about capacity or financial resilience**. Regionally, Wales and the **South West saw the largest drops**, while **Scotland and the Midlands maintained relatively high confidence levels**. This downward shift aligns with other data in this report showing occupancy pressures, rising waiting lists, capacity restrictions and challenges to customer retention.



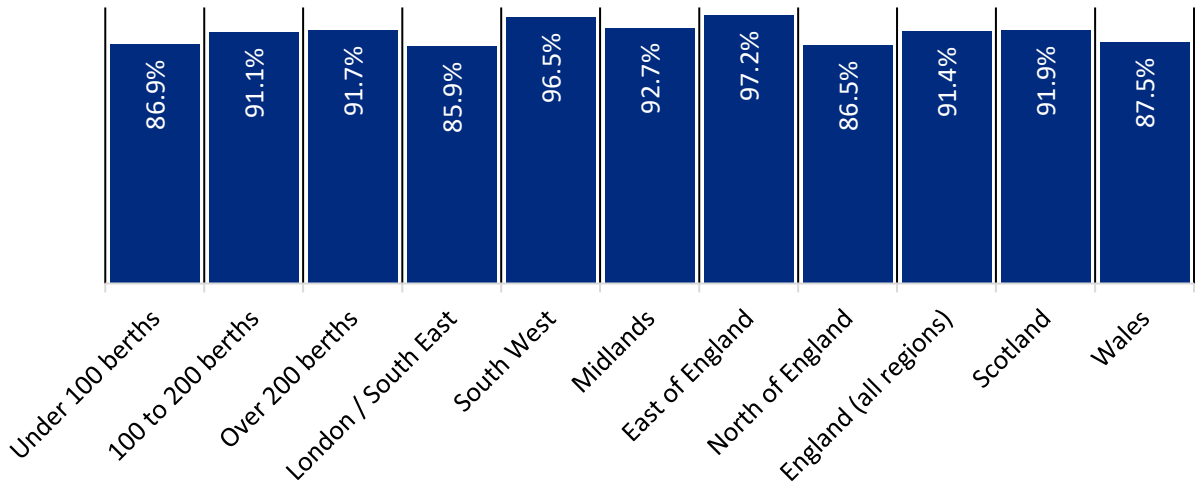
Marina & Moorings Market Occupancy Rates

Occupancy was high across most berth types, with residential (96.3%) and leisure (94.7%) leading, while dry stack showed the lowest usage at 63.6%. Coastal marinas generally had higher occupancy than inland ones, with higher rates across leisure (96.6% vs 90.4%), residential (96.9% vs 91.5%) and dry stack berths (70.1% vs 46.0%). Occupancy also varied by marina size and location, with smaller marinas (under 100 berths) showing lower rates (86.9%) compared to mid-sized (91.1%) and large marinas (91.7%). Regionally, coastal marinas on the East (97.2%) and South West (96.5%) coasts had the highest occupancy, while the South East (85.9%) and North lagged behind, with occupancy rates below 90%.

Average Occupancy by Berth / Mooring Type (%)*



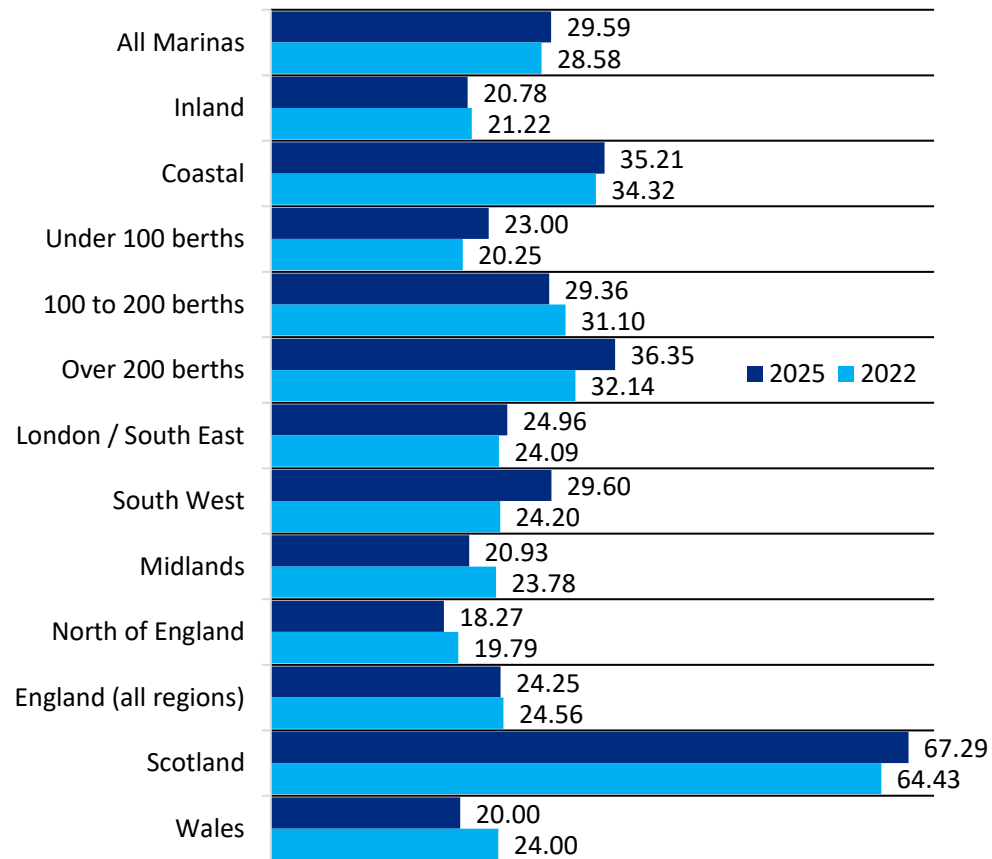
Average Occupancy by Marina Size & Region (%)*



Please Note: These occupancy rates measure occupancy as of 30 September 2025, to assess the state of the market at the end of the boating season. As a result, these figures cannot be compared with previous years, which were measured in April, at the beginning of the season, and have therefore been omitted from this report.

Marina Berth Size Trends

**Average (Maximum) Berth Size
by Marina Type, Size & Region (m)***



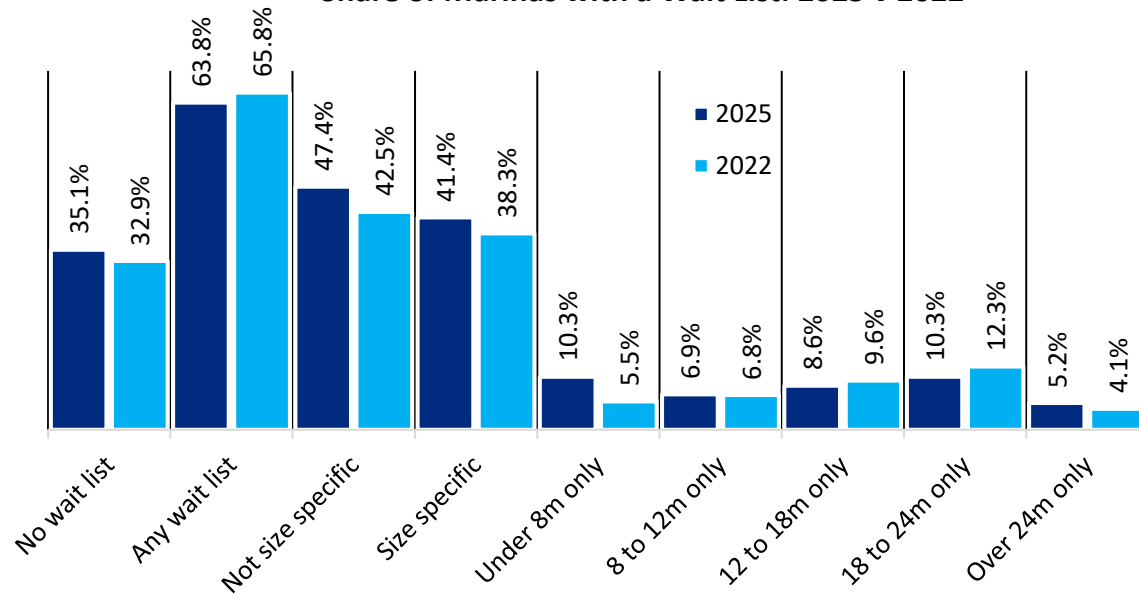
- **Overall stability with marginal shifts:** Average “standard” berth sizes across UK marinas are broadly stable between 2022 and 2025, with only small movements (generally within a few tenths of a metre), **suggesting no radical redesign of berth layouts in the period.**
- **Coastal vs inland differentiation:** Coastal marinas consistently offer larger average berths than inland marinas, reflecting their focus on larger cruising and sea-going vessels (including commercial vessels), while inland locations remain optimised for smaller craft and narrower beam profiles.
- **Size matters – bigger marinas, bigger berths:** Marinas with 200+ berths tend to have slightly larger average berth sizes than small marinas, indicating that **larger facilities are either purpose-built or progressively upgraded to accommodate bigger boats** and a more mixed fleet.
- **Regional variation reflects fleet mix:** Certain coastal regions with **strong cruising or higher-value markets (e.g. major yachting coasts)** show above-average berth sizes, while more constrained or traditional areas maintain smaller averages, consistent with older infrastructure and smaller legacy fleets.
- **Superyacht and mixed-use marina are outliers:** Where present, **superyacht and mixed-use marinas (e.g. catering to fishing fleets and other commercial craft)** significantly pull up the upper end of the berth-size range, confirming a clear niche for very large vessels alongside the more “standard” UK leisure fleet.

Please Note: Results for the East of England region have been removed due to the low number of responses skewing the average berth size unrealistically high compared to 2022.

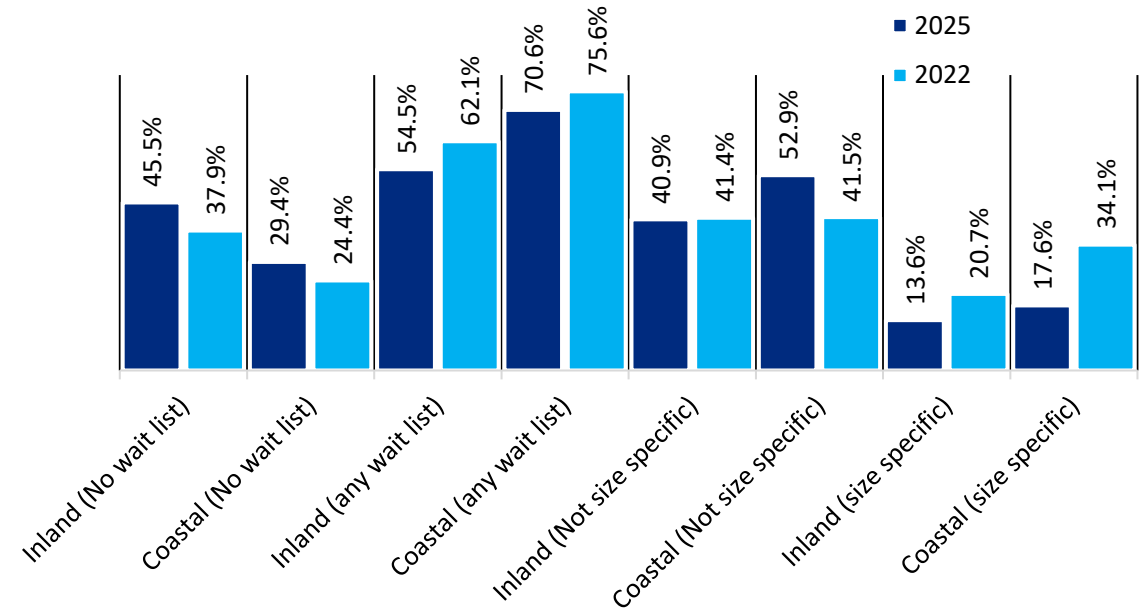
Marina Waiting Lists

Coastal marinas continue to show significantly higher waiting list prevalence than inland marinas, with 70.6% maintaining any kind of wait list (inland marinas: 54.5%), while **inland marinas are more likely to report no waiting list** (45.5% v 29.4% for coastal marinas), **suggesting greater berth availability or lower demand**. These trends point to **pressure on coastal infrastructure and a broad berth shortage, especially in high demand areas** (see next slide for more detail). The situation has improved since 2022, however, with the proportion of marinas maintaining any kind of waiting list decreasing (65.8% to 63.8%; inland: 62.1% to 54.5%; coastal: 75.6% to 70.6%). This may reflect a **slight softening of berth demand post-pandemic**, which may be driven by the withdrawal of new owners from the market, as well as legacy owners selling up in the face of an affordability crisis, as highlighted elsewhere in this report. **These trends may also reflect increased berth provision following large-scale capital investment to upgrade marina infrastructure following the pandemic-era surge in berth demand.**

Share of Marinas with a Wait List: 2025 v 2022



Inland v Coastal Marina Wait Lists: 2025 v 2022

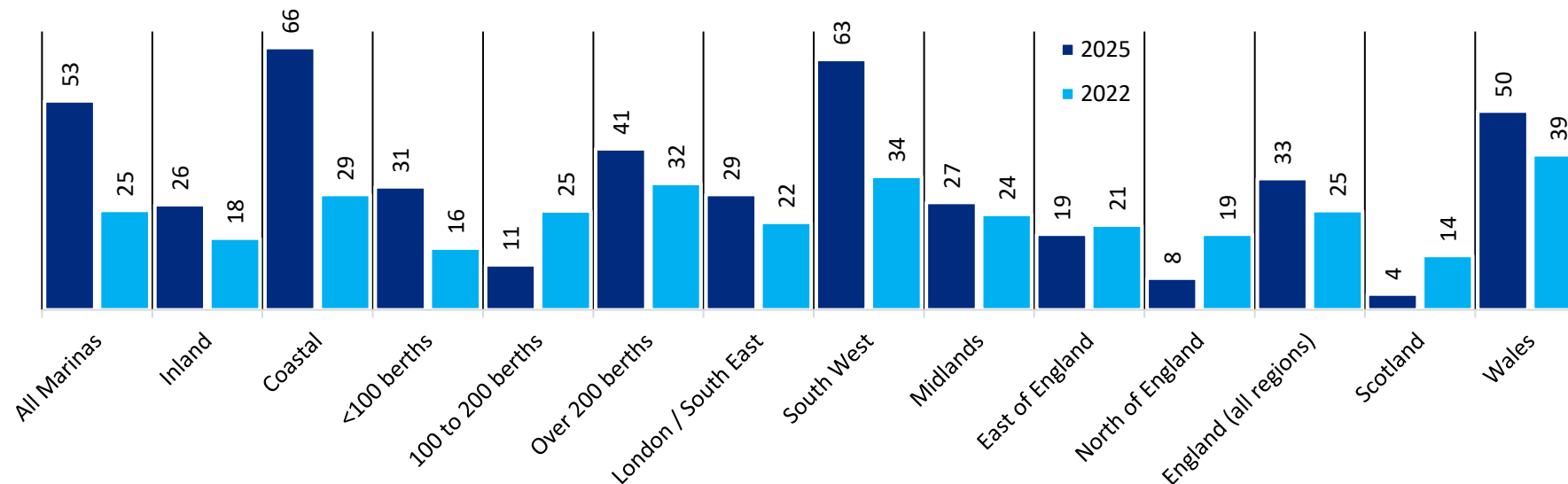


Please Note: Having a waiting list does not necessarily mean that a marina is at full occupancy. Waiting lists can either apply to all berths in a marina or to specific size berths. For example, a marina can have 85% occupancy overall, but no vacancies for berths over 12m.

Marina Waiting Lists

This slide reveals a **clear upward trend in average waiting list sizes** across TYHA marinas between 2022 and 2025, with increases evident across nearly all categories. **Coastal marinas show the highest average waiting lists** (66 in 2025 vs 29 in 2022), **reflecting sustained demand pressure**, especially in the South West, while inland marinas saw more moderately growth (26 vs 18). **Smaller marinas (<100 berths) experienced the sharpest rise** by marina size (31 vs 16), suggesting **limited capacity is being outpaced by demand**. Regionally, the **South West (63)** has the longest average waiting list, **indicating strong berth demand in popular cruising areas**. These patterns suggest a widening berth shortage in high-demand coastal regions, with demand spiking since 2022, while berth demand remains consistent on inland waterways.

Average (Mean) Waiting List Size by Marina Type, Size and Region

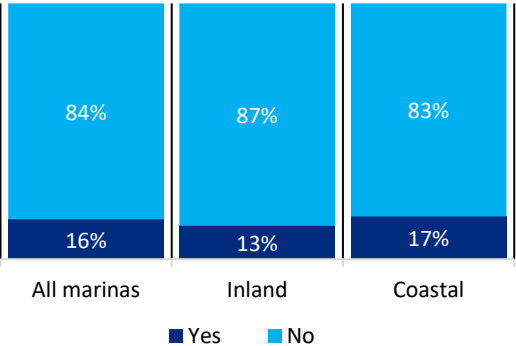


Please Note: Having a waiting list does not necessarily mean that a marina is at full occupancy. Waiting lists can either apply to all berths in a marina or to specific size berths. For example, a marina can have 85% occupancy overall, but no vacancies for berths over 12m.

New Developments & Site Upgrades

Just 16% of respondents indicated that they were looking to make upgrades at their sites (2022: 19%), despite high occupancy and waiting lists recorded in this survey. No new builds have been reported, instead the focus has been on site upgrades and operational modernisation – including new digital and carbon neutral infrastructure – to compete for existing customers. The average site expansion recorded in the survey was marginal, at just 5 berths, which would increase nationwide berths by just 0.5%. In contrast, in recent years there have been more mergers and acquisitions in the sector than new developments and upgrades, driven by the difficulty in securing planning permission for new developments and upgrades, an increasing move to consolidate post-COVID and the attraction of private equity into the market who view UK marinas as defensive, high-margin, recurring-income assets, with limited supply and high barriers to new developments supporting long-term pricing power.

Are you looking to change the number of berths, moorings or other boat storage type at your site(s) over the coming 12 months?

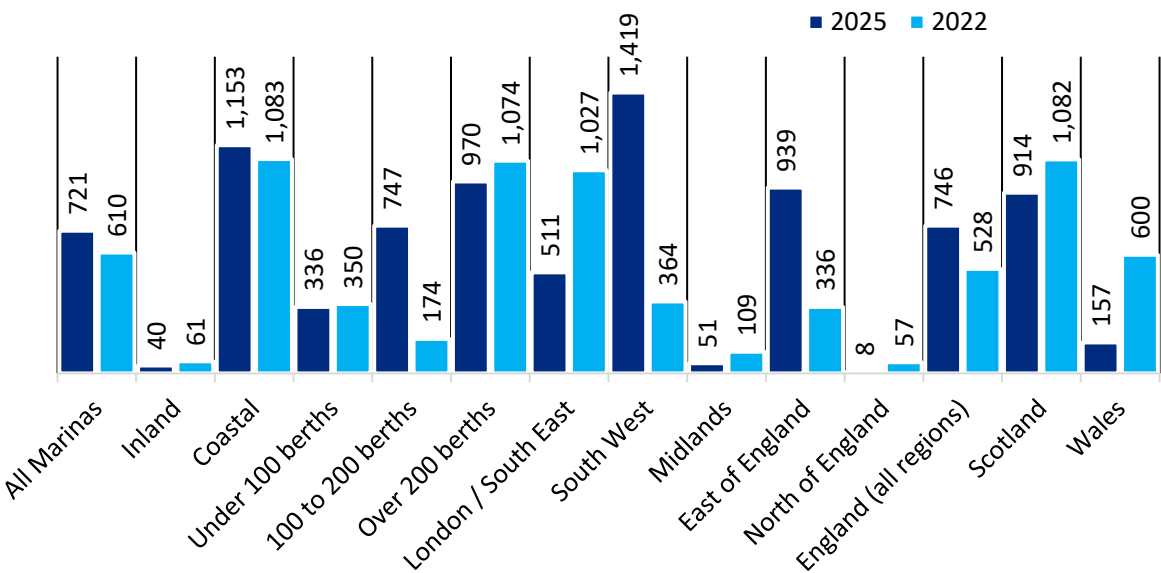


Please Note: Estimates are based on current (approved) planning applications to construct new marinas or extend current marina capacity sourced from local councils, as well as responses to questions about marina developments asked in British Marine’s Marina Market Survey.

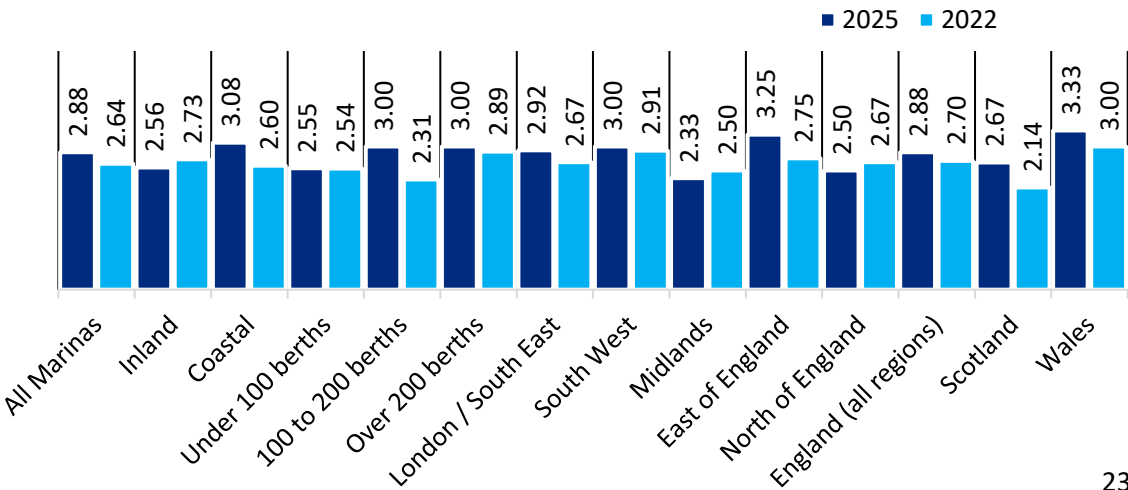
Location / Site (Year)	Development Type	Description
Premier Marinas (2025)	Marina upgrade	Full pontoon regeneration and equipment and technology upgrades to Falmouth Marina.
MDL Marinas (2025)	Marina upgrade	Upgrades across its marina network including pontoon regeneration, equipment and technology upgrades.
Associated British Ports (2024)	Marina upgrade	Upgrades to Ipswich Beacon Marina, including new pontoons and facilities for berth holders.
Lakeland Leisure Estates (2024)	Marina upgrade	New pontoons, EV charging and berth holder facilities at Roydon Marina Village
Antin Partners (2025)	Merger & Aquisition	Private equity acquisition of Aquavista Watersides, 2025
Premier Marinas (2025)	Merger & Acquisition	Aquisition of Boatfolk Marinas group, 2025
Tingdene Marinas (2025)	Merger & Acquisiton	Acquisition of Holy Loch Marina and Farndon Marina, 2025
Lakeland Leisure Estates (2022)	Merger & Acquisition	Acquisition of Barton Marina
Aquavista Watersides (2021)	Merger & Acquisition	Acquisition of Castle Marinas group, 2021

Coastal marinas saw the highest number of visiting boaters and scored closest to – or above - normal levels, reflecting strong levels of leisure cruising and tourism-driven activity. Inland marinas showed much lower volumes with slightly below-normal scores, pointing to reduced or inconsistent boater movement, possibly due to access limitations or lower demand. Larger marinas—particularly major coastal hubs—tend to outperform smaller sites because they offer deeper water, better facilities, and more established cruising routes, which attract higher levels of transient traffic. Regionally, major yachting areas such as the South Coast, East of England and Scotland lead cruising traffic, due to strong leisure demand, destination infrastructure and favourable cruising conditions. Overall, coastal and larger marinas account for the majority of cruising activity, while smaller and more remote sites receive much more moderate levels of activity.

Average (Mean) No. of Visiting Boaters: 2025 v 2022



No. of Visiting Boaters compared to normal levels: 2025 v 2022
(Mean Score: Min: 1, Max: 5, 3: At normal levels)



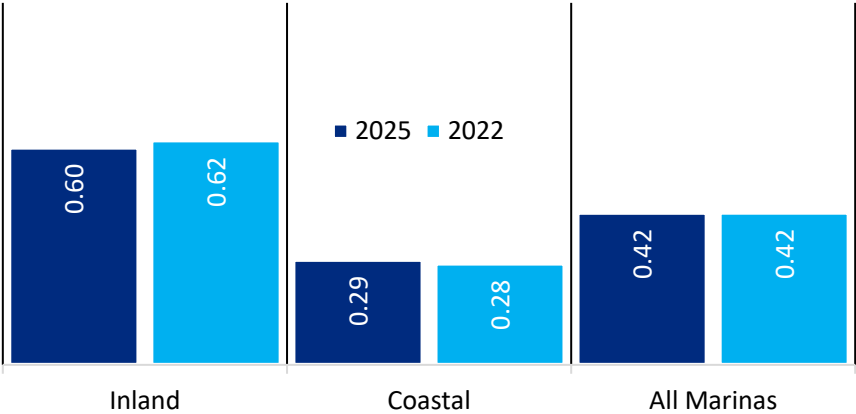
Key Sector Issues



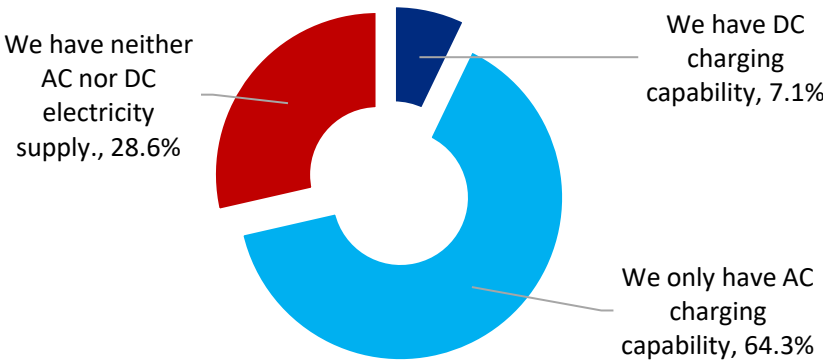
Decarbonisation: EV Charging

The charts below show that **most marinas (64.3%) only offer AC charging on their pontoons**, with just **7.1% support DC charging**, while **28.6% have no electric charging capability whatsoever**. **Demand for electric boat charging among berth holders remains virtually non-existent**, with inland marinas reporting higher mean demand scores (0.62 in 2022) than coastal marinas (0.28), but both scores remain only just above 0. As a result, the **most significant barrier to installing DC charging is a perceived lack of customer demand (98%)**, followed by high installation costs (57%) and insufficient local electricity supply (45%), with environmental and site-specific challenges and disruption concerns cited less frequently.

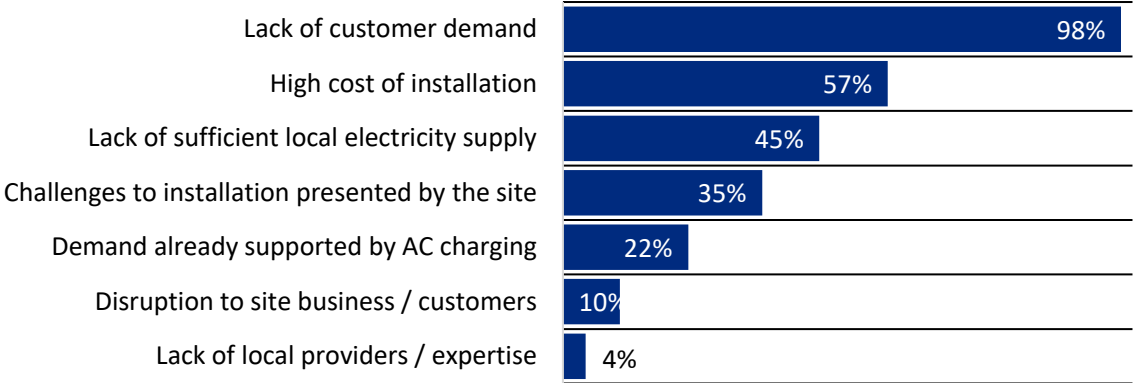
What is the current level of demand for the capacity to charge electric boats among your berth holders?
(Mean Score: Min=0, Max=5)



Which of the following statements best describes the ability of your marina site to charge electric boats?



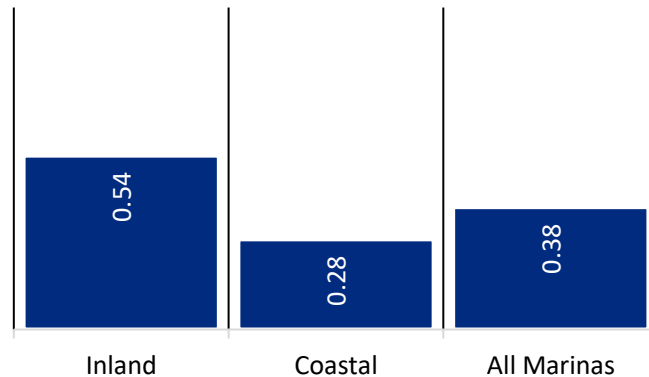
What barriers, if any, are there to you installing DC charging stations at your marina site?



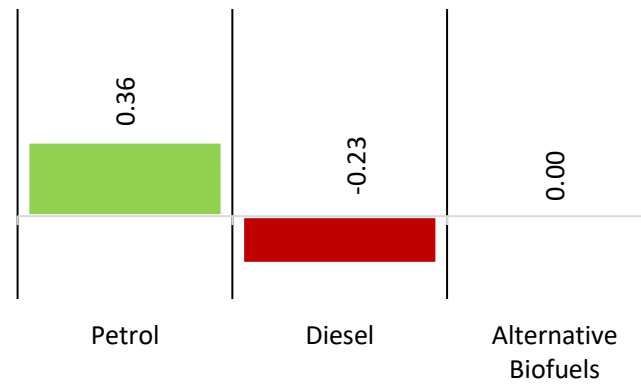
Decarbonisation: Biofuels

Demand for biofuels and alternative fuels for boats is also minimal, with inland markets showing higher overall demand (0.54) compared to coastal markets (0.28) but again scoring close to 0. During the 2025 boating season, **petrol demand exceeded expectations, diesel demand fell below expected levels, and alternative fuels showed neutral demand**, given the low demand and volume of sales. Actual fuel sales remain overwhelmingly dominated by diesel (84.2%), followed by petrol (15.2%), with alternative fuels accounting for just 0.6%, indicating a **significant gap between public debate about and interest in biofuels and their adoption in practice**.

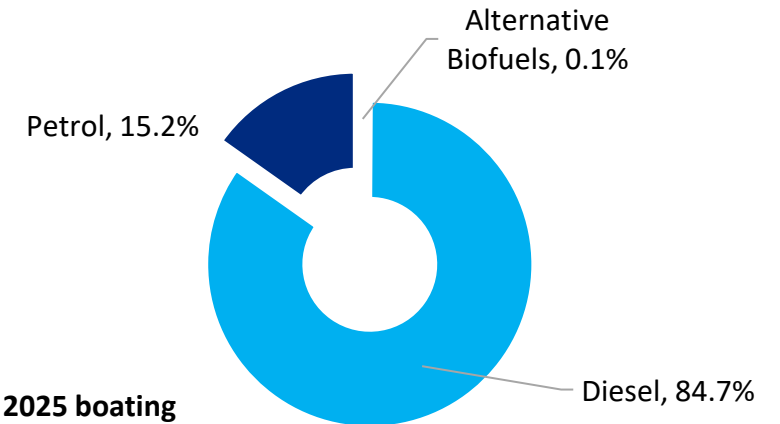
What is the current level of demand for biofuels among your berth holders?
(Mean Score: Min=0, Max=5)



How does demand for fuel during the 2025 boating season compare to the level of demand you would normally expect to receive during this period?
(Mean Score: Normal levels=0)



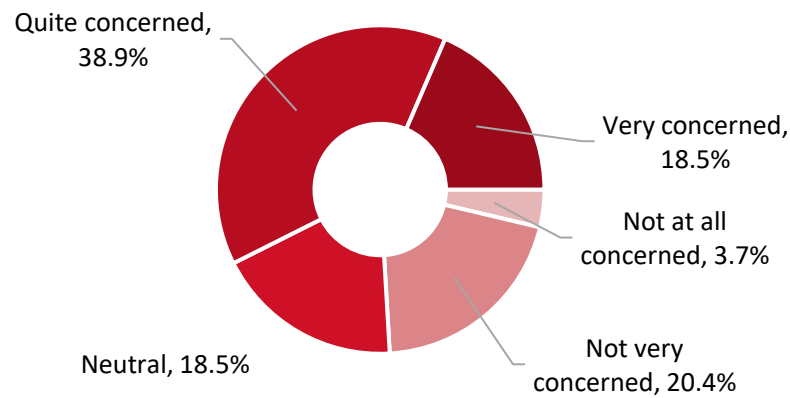
Fuel Sales by Fuel Type



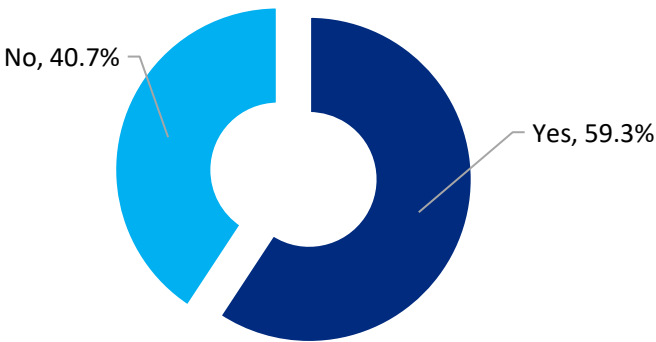
Abandoned & End-of-Life Boats: Scale of the Problem

The charts below highlight the **widespread concern among UK marinas regarding end-of-life and abandoned boats**, with **59.3% of sites reporting at least one abandonment in the past year** and **57.4% of respondents expressing high concern with the issue**. On average, each marina responding to the survey deals with **2.35 abandoned boats annually**, contributing to an **estimated national total of 990 abandoned boats** and a **disposal cost of £1.32 million each year**, based on an **average removal cost of £1,335 per vessel**. Initial estimates from the **European Boating Association** estimate that **at least 1% of boats reach the end of their life and are abandoned each year**, which would **equate to almost 5,000 boats per year in the UK**. This estimate, while underscoring the scale and financial burden of the issue, almost certainly underestimates the full scale of the problem and **the significant operational and environmental challenge it poses for the sector**.

On a scale of 1-5, how concerned are you regarding the issue of abandoned boats?



Over the last 12 months, have any boats or other types of watercraft been abandoned at your site?



2.35 boats

Average number abandoned at each marina every year

990 boats

Estimated number abandoned every year

£1,335

Average cost to dispose of abandoned boat

£1.32m

Estimated total disposal cost

Abandoned & End-of-Life Boats: Disposal & Future Challenges

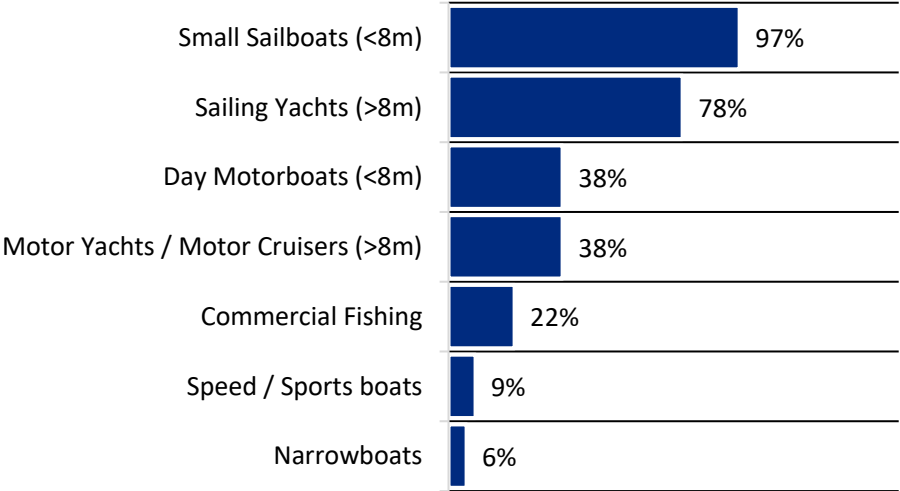
Small sailboats (97%) and sailing yachts (72%) are the most commonly abandoned vessels at UK marinas, reflecting the high volume of GRP boats of this type built in the 1970s that are now reaching the end of their lives, as well as the high cost of maintenance involved in keeping boats of this type. Disposal methods vary, with **most respondents (47%) still waiting to dispose of abandoned vessels at their site**. With many boats abandoned due to owners' being unable to afford the cost of maintaining them – particularly following the pandemic boom in boat ownership – **38% of respondents managed to trade boats that were abandoned – but not at the end of their life** – either through brokerage or at auction. **Only 13% of respondents were able to salvage and recycle abandoned vessels**, while **22% were forced to dispose of these vessels via landfill**. Looking ahead, although previous year figures are higher, TYHA members expect an average of **1.35 boats to be abandoned per marina in 2026**, contributing to a **projected national total of 570 abandoned boats** and an estimated **disposal cost of £760,000** over the next 12 months.

1.35 boats
Average number of boats TYHA members expect to be abandoned at their marinas in 2026

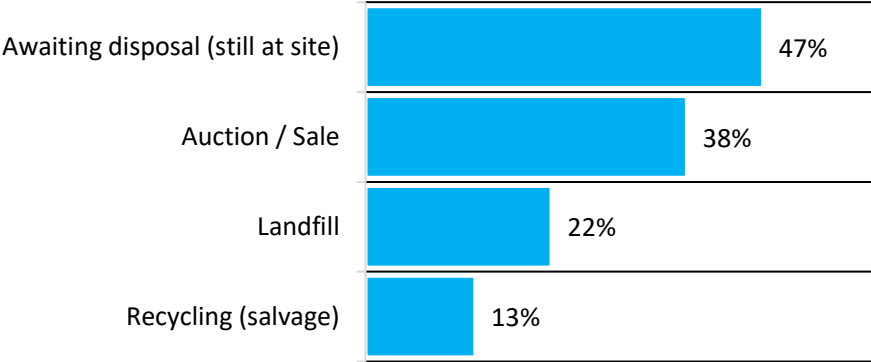
570 boats
Estimated number abandoned across UK harbours & marinas in 2026

£760k
Expected total disposal cost over the next 12 months

Boats Most Commonly Abandoned



How did you dispose of these boats and any related equipment and materials?



Abandoned & End-of-Life Boats: Key Issues & Challenges

The table below outlines some of the key issues contributing to the problem of boat abandonment, the challenges operators are facing and some of the potential solutions identified by TYHA members.

Challenge	Notes	Potential Solutions
High Cost of Ownership	Not all boats are “end-of-life”, some are simply abandoned due to the time or expense involved in maintaining them. The value can be recouped for some of these craft if sold through brokerage or at auction. It is expected that the abandonment will only increase as living costs increase and boat owners age out.	-
High Cost of Disposal	For boats reaching the end of their life, the cost of disposal is falling on the last owner – who often bought the boat cheaply and cannot shoulder the bill of disposal. As a result, boats are being dumped and it is falling on operators to deal with it, not owners.	Some members have called for a transparent, comprehensive registration scheme to ensure accountability among owners. They have also suggested a sales tax throughout the lifetime of the vessel, which can be used to pay for the cost of disposal, distributing the cost amongst successive owners.
Lack of Recycling Infrastructure	There is limited number of recycling facilities, which are poorly advertised. And these are not Government-funded, as in Europe, and so the expense of recycling boats – approximately £100 per foot – falls directly on marina businesses.	Members have called for improved recycling infrastructure, including sites where boats can be burned to recapture energy, returning it to the grid. This boat recycling scheme should be funded by a Government program.
Lack of Policy Support	Management of the problem is falling on individual harbours and marinas, with no direct support from Government. British Marine and the RYA have made some strides in supporting marina businesses, through the Green Blue’s general advice and guidance, End-of-Life “wreck” reporting, and recycling facilities maps, but greater regulatory framework, oversight and direction is needed.	Members have called for more Government direction. With a legal framework outlining the responsibilities of owners, marinas and local authorities. Procedures to follow in boat disposal, including who should be managing disposal, as well as the development of a comprehensive network of recycling facilities, all supported by Government funding.

Methodology

This report is published to enhance knowledge of the sector, identify key trends over time and provide key market insights for marina operators. It is only possible to complete this research reliably through the time dedicated by British Marine members in engaging with British Marine’s market research team, for which thanks is extended. All data is held in complete confidence.

This report details a wide range of key performance indicators and market insights for the UK’s marina and moorings sector, including data on capacity and occupancy; marina waiting lists; marina expansion plans; sentiment data on market performance across key revenue streams; sentiment data on current and future berth demand; and qualitative feedback on key challenges facing the sector, such as decarbonisation and boat disposal. A description of the methodology used in this research is provided below:

- The findings in this report are based on primary data collected through an expanded survey of members of British Marine’s TYHA association, who together account for approximately 60% of berth provision across the UK .
- This survey was run between October and November 2025 and received a **31%** response rate among British Marine’s member marina operators. Multiple emails were sent to participants, with prompts at association meetings, followed up with telephone calls.
- The table below outlines the sample sizes, response rates and provides a sample confidence interval (or the margin of error for these results) as a guide only.
- The target for this sample is a confidence interval of **<5%**, however this is dependent on TYHA member availability and willingness to provide feedback within the allotted timeframe. As a result of challenges with this, the sample falls short of the target.
- The target confidence interval of **±5%** has a smaller range of possible outcomes, a smaller margin of error and therefore indicates higher reliability in the survey results. A confidence interval of **±10%** indicates a wider range of possible outcomes and therefore greater uncertainty in the survey results. For more information on margin of error and what this means in the context of the survey results, please see the next page.

Survey Year	Survey Dates	Survey Population*	Marinas Represented	Complete Responses	Marinas Represented	Complete Responses %	Sample confidence @ 95% level (±%)
2025	October-November 2025	176	300	55	93	31%	±10.05%
2022	April-May 2022	188	295	69	139	37%	±9.41%

**The survey population consists of all marina operators in TYHA membership, including both individual marinas as well as marina groups that manage multiple marina sites. Individual marinas belonging to these groups have been removed from this total.*

Margin of Error

- The margin of error represents the maximum expected difference between the survey result (based on x number of TYHA marinas responding to the survey) and what the result would be if every marina in the UK answered the survey (the "true value" of the survey population). The margin of error figure therefore measures uncertainty in the survey results and shows the possible range in which the "true value" likely falls.
- The margin of error is calculated based on the number of respondents to the survey and the variability in responses (standard deviation) measured against the size of the "survey population" (all UK marinas) that we are trying to make inferences about, using the results of this survey.
- For example, in the survey **57%** of marinas indicated that they were concerned about end-of-life boats. With a margin of error of **±10%**, the "true" result, if we asked this question to every marina in the UK **could either be as low as 47% or as high as 67%**. If the margin of error was **±5%**, the range of possible values would be much narrower (**52% to 62%**).
- A **±5%** margin of error therefore represents the ideal range, indicating a higher level of confidence in the survey results, suggesting that the sample closely reflects the population. Conversely, a larger margin of error (like **±10%**) suggests greater uncertainty and variability in the results.
- In the context of this research, this means that the results **could** differ significantly from the true result if we were able to speak to every marina in the UK. In consequence, these results should only be used to draw conclusions about TYHA marinas participating in this research, rather than used to make inferences about the marina market as a whole.

Further Information

Thank you for reading this report. This research was produced by British Marine's Market Research and Statistics department. British Marine publishes a wide range of market and economic research to promote and support the UK leisure, superyacht and small commercial marine industry, including:

- *Biennial KPI research providing insight on the economic performance and impact of the industry;*
- *Annual market research tracking boating participation and ownership trends;*
- *Reports quantifying the volume, value and key characteristics of boating tourism;*
- *Trade data exploring marine related imports and exports and the UK marine industry's key trading partners;*
- *Reports exploring the marine industry labour market and skills, training and productivity in the industry;*
- *Reports quantifying the value of individual small commercial marine, recreational marine and Superyacht markets*
- *And a host of other research reports providing insight on domestic and international leisure marine markets*

These research reports are available for free to all members of British Marine and can be downloaded directly from the British Marine website. British Marine also provides a bespoke analytical service to support members' individual needs. To learn more about market research at British Marine, please contact info@britishmarine.co.uk.