Guernsey Ports – Income and expenditure review

Mooring holder survey - September 2023

Method

The online questionnaire was publicised through a mailshot sent to all Guernsey Ports' mooring holders on 20 September 2023. They were invited to complete the survey, even if they had already responded to a questionnaire sent out by the yacht clubs.

Response

The overall response of 447 represents around 27% of mooring holders, which is a good/high response rate and would normally be considered a representative sample. There is some likelihood that respondents were more inclined to participate if they felt very strongly - and negatively - about the current proposals.

The survey followed an earlier mailshot and media coverage announcing the proposed increases, which gave examples based on the cumulative impact of rises over three years. It is likely responses were given in that context, rather than being specific to the increases proposed for 2024, which although significant are lower than the three year target.

General profile

Typically respondents were over 55 (54%), and owned a motor cruiser (70%) in the QEII Marina (52%) of less than 10 metres in length (70%), and had been a boatowner for more than 10 years (59%). Only 25% were under 45 years old.

The age profile suggests that either boatowners are predominantly older than average, or younger mooring holders were less inclined to participate in the survey. Based on 2021 population figures, 57% of islanders were under 50 (only 25% of respondents were under 45), and only 27% of islanders were over 60 (54% of respondents were over 55).

The overall split broadly reflected the proportion of overall berths in each marina (based on the 2021 Future Harbours Policy letter), with a slightly high response from QEII (52% of respondents vs 46% of moorings) and slightly lower for 'non-marina' berths (10% vs 15%).

A similar response (464) was received for the Marina Projects survey of local mooring holders in 2022, with a similar breakdown of marina location, vessel type and size. There was however a higher response to the current survey from St Sampson's mooring holders (20% of respondents vs 13% in 2022).

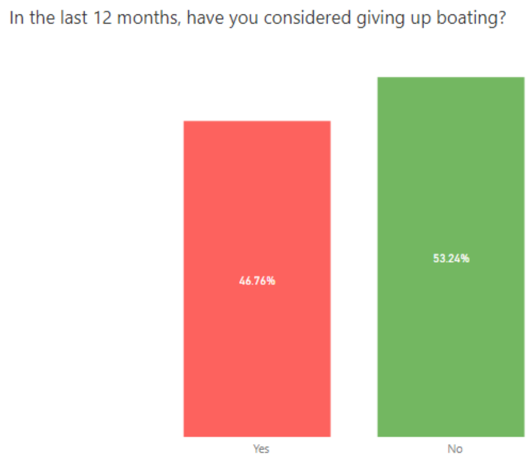
Likelihood to give up boating

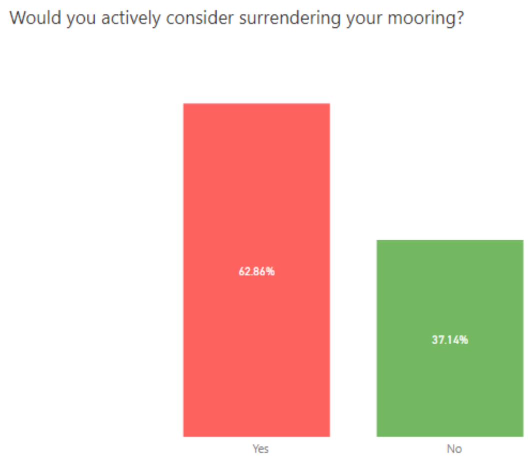
Just under half of respondents (47%) said they had considered giving up boating in the past 12 months. Of those, 90% mentioned cost as a reason, and for nearly half (46%) cost was the only factor mentioned. The next most common reasons were Services and Facilities (29% of those who had considered giving up) and Time constraint/Availability (27%). Change in family circumstances was given as a reason by 11%.

A third (34%) of respondents who had considered giving up boating gave a combination of two factors, and 17% listed three or more factors.

9% made specific reference to the proposed increase on mooring fees.

It is very likely that the way the question was worded, respondents will have considered “in the last 12 months” to include their view currently, rather than prior to the proposed increases being announced. When asked specifically about their likely intention in light of the proposal, a larger proportion (63%) indicated they would consider giving up boating.





When asked by Marina Projects about intentions in 2022, only 3% indicated they intended to sell and not replace their boat in the next five years. That is a very marked difference to the numbers that now indicate they have considered or are considering giving up boating, with cost being the most common reason. Although it was a much smaller sample size (12), of those who were considering giving up boating in 2022 only 25% gave cost as a factor, with 67% noting a changing in family circumstances.

Asked if they would actively consider giving up their mooring now, 44% of respondents who said they had not considered giving up in the past 12 months would now consider doing so. Only a third of respondents (37%) said they had no intention of surrendering their mooring.

Given the nature of the current proposals, respondents may be inclined to overstate their present intentions. Nevertheless the response is predominantly negative, albeit with a caveat that two thirds of mooring holders did not take part in the survey.

Another comparator with the 2022 study is the question about how fuel costs have impacted usage. 43% of respondents in the latest survey reported using their boat less, whereas 12 months ago that figure was just 24%, even though the impact of rising fuel prices are likely to have been felt by then. This could be a reflection of other cost pressures increasing, but could also indicate respondents were more inclined to provide a negative response at the current time.

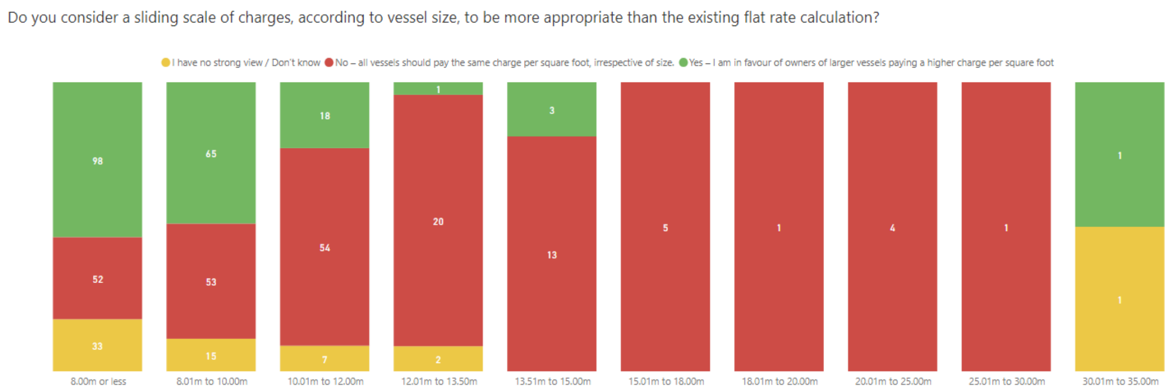
Facilities

One of the reasons frequently cited for why mooring charges in Guernsey should be lower than market rates is the comparative lack of facilities provided - with security and car parking among those often mentioned. However respondents with a mooring in St Sampsons, which does have security and where parking is generally available than in St Peter Port, were no less likely (66% vs average 64%) to indicate they would be inclined to surrender their berth.

Differential pricing

Feedback on the proposal for a higher rate of charge (per sq metre) to apply for larger vessels was relatively evenly split. Overall 45% were against the proposal, while 42% were in support, with 13% having no strong view.

Unsurprisingly, support was higher among owners of smaller vessels. For boats of less than 8 metres, those in favour (54%) outnumbered those opposed (28%) by two to one. However for those with vessels of 12 metres of more, support for higher charge rates was below 20%.



Other feedback

In addition to the survey, various comments were received from boatowners, largely by email, following the initial mailshot announcing the proposed (three year) increases. These were mostly negative, and reflected similar themes to those expressed through the survey feedback.

A further representation was also received at the time of the survey, suggesting "the vast majority of berth holders who are not voicing their opinion are either in favour of the increases, or neutral", "increases are long overdue", and the proposals were "fair and proportionate".

That viewpoint is highly subjective and is not reflected in the survey feedback. However it does suggest that not all boatowners are opposed to the proposed tariff increases, but to what extent is impossible to quantify. It is reasonable to assume that someone in agreement with the changes may be less likely to participate in a survey or voice support than those opposed. Only around a quarter of mooring holders invited to participate completed the survey, and the feedback may therefore not fully represent an overall balance of opinion. The survey results do however provide evidence that there is very strong opposition to the changes and that is likely to be the majority view, neither of which is surprising.

It is also fair to reflect that many respondents were considering the cumulative effect of the proposed increases over three years, which had been widely publicised, rather than the much lower proposed rises in tariffs for 2024.