WARDALE
marine industry consulting

Nelson Marina – Land Development Plan

Appendix A: Supply & Demand Analysis

MARCH 2021

Contents

1. Executive Summary

Executive Summary – Supply & Demand Analysis

Macro Trends

- WARDALE analysis of long term trends in NZ and international marinas and vessel demand has highlighted key trends including:
  - **Growing boat ownership rates** which have historically exceeded population growth, however overall participation rates remain steady as % of population
  - **Preference for powered vessels** given boaties are time constrained
  - **Increasing vessel length** in marinas and power boats
  - **Improving standards** at marinas to meet requirements of older and more affluent customers, as well as increasing environmental regulations
  - **Alternative storage options** with hardstand, sheds and boat stackers are increasingly used for smaller vessels
  - **Optimisation of space** since marina land, water space and deep water access are becoming increasingly scarce and difficult to consenting new locations

Operational Management

- Improvements to operational management practices in the marina can improve certain demand issues in the short term, e.g, car parking non-compliance
- However, development and infrastructure is required to address long term demand growth

Executive Summary – Supply & Demand Analysis

Marina Berths Supply & Demand

- The Nelson/Tasman/Marlborough/Wellington region has current supply of ~3,000 marina berths and a further 348 consented for development
- Indicative regional excess demand for marina berths is conservatively 324, which is sufficient to fill almost all of the 348 consented supply of upcoming additional berths
- Overall monthly permanent berth occupancy consistently above 90% since 2008, currently 97%
- Nelson Marina is at 100% occupancy in most berth sizes, however lack of demand for pile moorings
- Growing waitlist for marina berths, now at 99 – forcing local vessels to fill other marinas e.g. Havelock
- Waitlist details reviewed and assessment is that ~60 (of the 99) represent current likely demand.
- Waitlist indicates shortages are most prominent in the 12 – 14m vessel size range
- Small berths (8 – 10m) have high vacancy indicating oversupply
- Larger boats are being squeezed into smaller berths
- Nelson Marina pricing seen as cheap and is supportive of demand. Only the inferior standard marinas at Evans Bay and Motueka are cheaper.
- Older timber pontoons, non full length fingers (e.g. 30m berths)
- Nelson Marina has current demand for 580 pontoon berths which exceeds supply of 552 by 28.
- NZMARINE estimates yachts & launches will grow at ~0.8% p.a., supported by population growth
- Excess demand for Nelson Marina berths is projected to grow from ~28 currently, to reach in the range of 149 – 185 by 2050

Executive Summary – Supply & Demand Analysis

Hardstand

- Overpriced yard, resulting in customers travelling to other facilities (e.g. Waikawa). Nelson Marina's hardstand yard prices are 54% – 78% higher than Waikawa
- Recent consultant reports found Nelson Marina vessels have high levels of fouling due to infrequent haulout, high pricing, a shortage of hardstand bays and lack of enforcement (now being actioned)
- Nelson Marina lost its Port of First Arrival ("PoFA") status in 2018 due to hardstand not meeting biosecurity standards
- Original resource consent required 80 hardstand bays, subsequently reduced to 3,500m2 hardstand
- Existing hardstand (3,050m2 plus 850m2 accessway to travel lift wharf) only has bays for ~14 vessels
- Insufficient capacity in yard and travel lift for peak demand
- Analysis of major regional hardstands shows an undersupply of hardstand bays relative to ideal industry target levels around 10% of berth numbers. Nelson Marina has largest shortfall, with its ratio only ~2%.
- Nelson/Tasman region short of ~30 bays. Nelson & Motueka are the main alternatives for adding capacity.
- Proposed new reclamation at Motueka could provide future capacity for up to 40 new hardstand spaces. However it is uncertain whether development will proceed in the foreseeable future.
- Nelson Marina hardstand upgrade is not to industry best practice for contaminants/water treatment
- Marine service provider demand for sheds to provide shelter from weather and wind
- Travel lift reportedly the oldest in NZ and is scheduled for replacement

Executive Summary – Supply & Demand Analysis

Boat Ramp

- The Nelson/Tasman region only has 3 major all tide boat ramps
- The Nelson marina boat ramp is the only quality boat ramp in Nelson. Short travel times for Nelson residents to sheltered all weather and all tide water access.
- Lack of alternative locations for new boat ramps in Nelson/Tasman due to constraints including shallow access, bars, narrow channels, road access, steep slopes/erosion and areas of cultural significance
- Trend towards older, less experienced boating users is likely to increase demand for convenient safe boat ramp access
- Shared location with rowing and sea sports users in centre of marina creating congestion and parking issues at peak times
- Conflicting vessel types (powered vs non-powered) sharing boat ramp causing issues
- Safety issues with powered/non powered vessels sharing the channel and limited visibility turning corner by Pier B
- Nelson Marina's boat ramp fee of $5 per day is below regional peers and payment by users is not being enforced. Nelson's low fee supports demand and congestion
- Ramp fee policy unclear and perceived as unfair (unpowered vessels assume not included)
- Car with trailer parking at boat ramp supply is 80. Shortfalls at peak times result in overflow trailer parking on Akersten Street. Issues at boat ramp exacerbated by:
  - Lack of dedicated marina car parking for Piers A and B
  - Limited available car only parking for Sea Sports users
  - Motueka Nets direct access to the area and parking usage
  - Lack of enforcement of single cars parked in car with trailer parks
  - Non compliance with payment by up to ~1/3 of parked boat trailers
  - Single entry/exit point onto Akersten Street

Executive Summary – Supply & Demand Analysis

Trailer Boat Storage

- The region has marina trailer boat storage supply of over 900 spaces
- Nelson Marina's pricing for trailer boat storage yard is below regional marinas and does not vary by size
- Nelson Marina's Council trailer boat storage compound has 60 trailer boat storage parks
- Most of the boats currently stored in the Nelson Marina trailer park are 6m to 9m length
- Nelson's trailer boat parking occupancy exhibits some volatility but on a 12 month rolling basis consistently exceeds 90%
- Small but growing waitlist, currently ~14
- Expectation of growing demand for land based storage space for trailer boats given urban intensification
- Boat storage sheds are experiencing good demand across the region, with facilities at capacity
- Large trailered vessels are not appropriate for towing on under-rated vehicles so storage close to boat ramp is beneficial for safety

Executive Summary – Supply & Demand Analysis

Car Parking

- The 1997 Nelson Marina resource consent requires ratio of car parks to marina berths of 0.75
- Current car parking provision estimated at only ~0.63 car parks per berth (implies an overall shortfall of ~71 car parks)
- Lack of dedicated marina car parking – berth holders competing with nearby business & public uses
- Shortfalls in available car parking are worse in certain sub-areas of the marina and at peak times, for example:
  - Poor car parking availability for Piers L to P with 209 berths and only 66 shared car parks (ratio only 0.32)
  - Parking in the boat ramp area is insufficient at peak times with the 40 berths on Piers A and B competing for 35 shared car parks with Seasport users, public boat ramp and Motueka Nets (despite the ratio of 0.88)
  - Parking for Piers C, D & E is insufficient at peak times with the 118 berths competing for 53 shared car parks with Tasman Yacht Club users, local businesses and the hardstand (ratio only 0.45)
- Lack of enforcement to remedy issues with single cars parking in trailer parks and non-payment

Customer Priorities

- Nelson Council 2017 survey of marina users showed the hardstand and security were important marina assets/services with low customer satisfaction
- Parking, refuelling, security, biosecurity and improved water quality were the key customer priorities. However there was a relatively low willingness from users to pay increased berth fees for improvements (only 14 – 31%).

Executive Summary – Supply & Demand Analysis

Sea Sports	• Sea Sports Alliance Group has 9 member clubs with about 470 active users of the Nelson marina • Strong growth in participant numbers ~60% growth over the last 5 years • Clubs generally do not have capacity to meet the needs of their growing membership • Clubs indicated demand for storage of 200 vessels, peak use of 50 car parks and 20 bike parks • Proposal for a new joint facility primarily due to easier fundraising collectively, but would increase congestion and health and safety concerns if located near the boat ramp area • Individual clubs have indicated willingness to consider alternative options
Environmental	• Friends of the Haven is focused on preserving the environment and believe that the existing reclamation land and marina water space should be fully utilised prior to considering any expansion into the Haven
Climate Change Resilience	• Tonkin & Taylor forecasts of Nelson's inundation hazards (based on MfE 2017 future sea level rise guidance) show coastal storm inundation increasing in frequency and magnitude over 50-100 years • Forecast mapping indicates that at SLR of 0.5m the reclamation height of ~4.5m would only have minor inundation during a 1% AEP coastal storm (mainly just road flooding) • SLR of 1m would cause widespread inundation of the reclamation during a 1% AEP coastal storm

Executive Summary – Supply & Demand Analysis

Liveaboards	• Relatively high number of liveaboards (41) versus other marinas • Pressure on parking and services. Can impact water quality if pumpout standards not adhered to • Liveaboards can provide security benefit • Visiting fleet generally higher standard than long-term local liveaboards
Water Quality	• Water quality in the marina is relatively poor • Historical contamination of seabed from the hardstand and tidal grid • Single pump out locations – current standard has in multiple berths and liveaboard berths
Security	• User survey 2017 indicates users want improved security at marina • Lack of secure equipment storage for Sea Sports users • Subsequent improvements to security via swipe card implementation • No security gates at pier heads
Fuel Berth	• Most berth holders carry fuel cans to manually fill vessels – safety and environmental concerns • Some use Talleys berth or the Port Nelson NPD berth • Potential to improve fuel berth capacity at the NPD berth, Port Nelson is supportive
Storage	• Good demand for storage sheds at other regional facilities • Additional dinghy storage required at Nelson

Executive Summary – Supply & Demand Analysis

Commercial Development

- Some private developers are seeking to purchase Council land on the reclamation for commercial development
- Residential apartments have been proposed by a local developer with a marine industry facility proposed by a marine service company with development aspirations.
- A concept plan for a major marina facility extension at the northern end has also been proposed by a marine industry company.
- Amount of land available for commercial development is yet to be confirmed as part of the masterplan process
- Divestment by Council of the marina reclamation land is not advisable given future growth projections for marine industry uses which require water access and lack of alternatives to replace this scarce resource

WARDALE
marine industry consulting

2. Macro Trends

Macro Marina Trends

WARDALE analysis of long term trends in NZ and international marinas and vessel demand has highlighted key trends including:

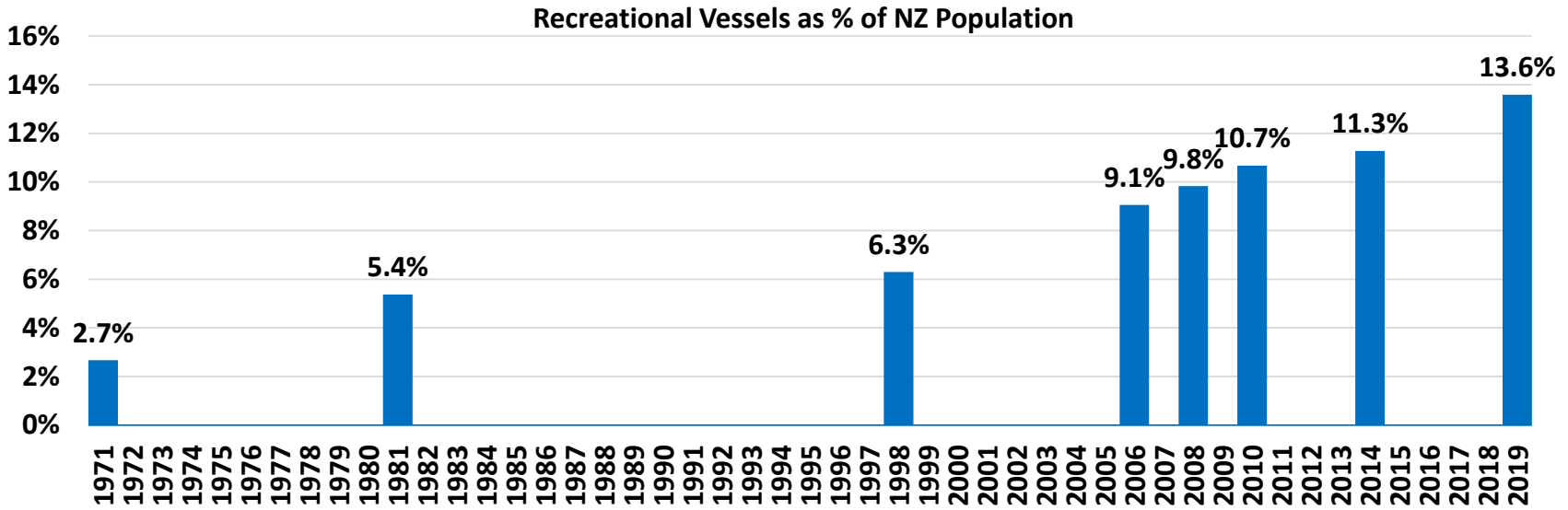
Growing Boat Ownership	• NZ has one of the highest boat ownership ratios in the world • The proportion of households owning boats has steadily increased over time • Long term growth in boat ownership supported by population growth
Preference for Powered Vessels	• Boaties are more time constrained, creating a trend towards powered vessels • Resulting in greater demand for launches than yachts • Strong demand for trailerable power boats and personal water-craft (jet skis)
Improving Standards	• Marina customers are generally becoming older and more affluent • Commercial marinas are improving facility and service standards to yield higher fees and returns • Higher standards for water quality and biosecurity
Increasing Vessel Length	• Demand for marina berths and new yachts/launches is strongest in 12m+ sizes • Marina developments have increased average berth size over time • Growing vacancy in marina berths for vessel sizes up to 10m
Alternative Storage Options	• Hardstand, sheds and boat stackers are increasingly being used for smaller vessels • Urban intensification is driving demand for storage sheds and trailer parking • Swing and pile moorings are declining, used to provide some affordable boating options
Optimisation of Space	• Consenting of new marinas is difficult to achieve given local opposition / environmental concerns • Existing marinas with access to deep water are a valuable scarce resource • Commercial marinas are optimising berths layouts and land uses within available space

For further details refer to: Marina Supply and Demand Study

NZ Boating Ownership Rates

Recreational vessel ownership has grown faster than the NZ population growth rate since 1971

- Historical NZ boat ownership rates calculated based on recreational boating surveys and census data



Source: Recreational Boating Surveys and Statistics NZ census data

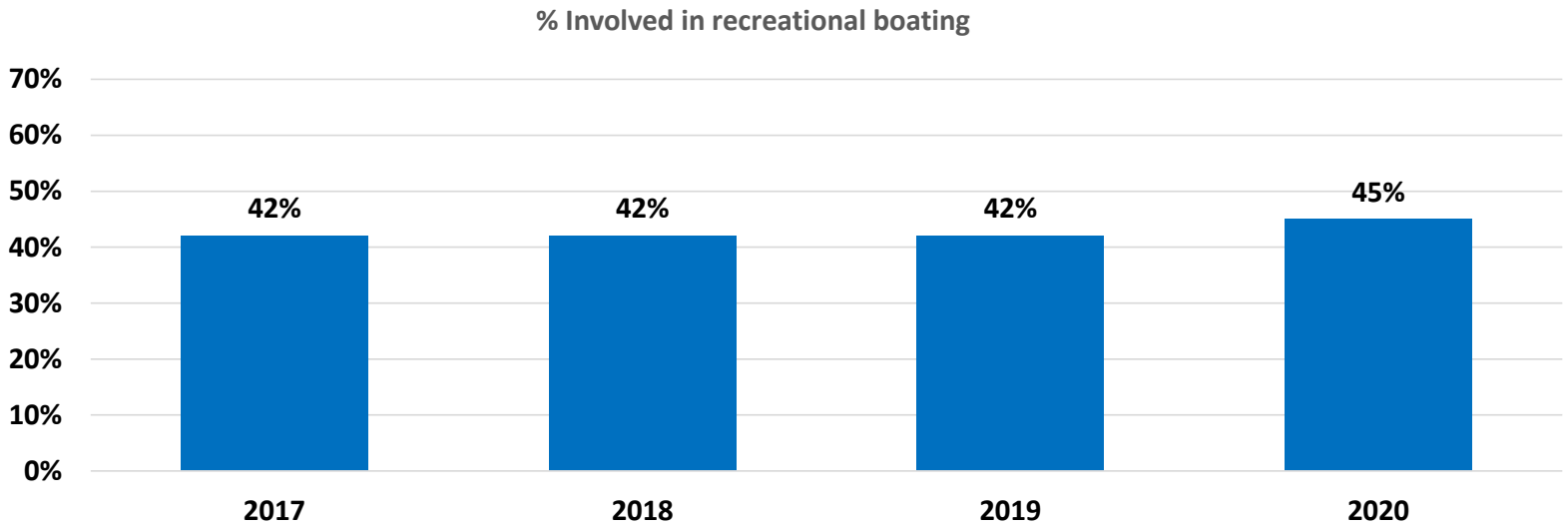
Household ownership surveys

- The proportion of households owning at least one recreational vessel (of any type) has increased at a more modest pace from ~15% in 1998 to ~19% in 2011.
- This implies households on average are becoming more likely to own multiple vessels

NZ Boating Participation Rates

Survey results show recreational boating participation rates (broader definition of usage[1]) amongst the general population has been relatively steady during recent years at ~42%. [2]

- An older participation survey result from 1996 was 41% – so participation rates appear steady over time



Source: Maritime NZ 2020 Recreational Boating Survey

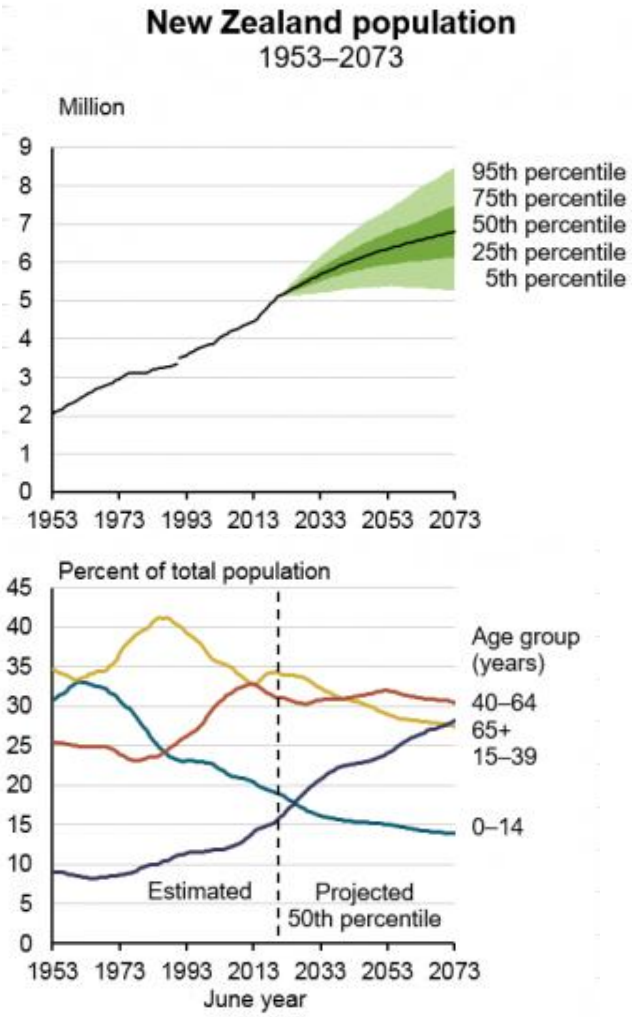
1. "Participation" is defined as either owning a recreational vessel, in charge of or skippering a recreational vessel (but do not own), or spending time on a recreational vessel (but do not own or skipper it). The definition of recreational vessels ranges from small vessels (windsurfers / kayaks) to larger vessels (power boats / sail boats more than 6 metres (20 feet) long).
2. Results are based on survey data so statistical variation +/- 2% is expected with 95% confidence. Differences in weather between years is also expected to affect reported participation levels in the surveys.

- Steady participation rates (despite increasing boat ownership rates) may be due to the reducing entry cost for small craft, e.g. kayaks, SUPs etc (so people who previously participated on a friends boat now have the means to own a small affordable vessel themselves)

NZ Long Term Population Growth

NZ's population (5.09 million in 2020) is forecast by Statistics NZ to continue growing, albeit at a slowing pace due to ageing demographics. Modest annual growth rates in the 0 – 1% range are forecast.

- The 40 – 64 year age bracket is most relevant for vessel ownership. Its proportion of total population is forecast to remain steady at about 30%.



Forecast Annual Population Growth Rate in Future Year

	NZ Population Forecast			40 - 64 Years Population		
Year	Low [1]	Median [2]	High [3]	Low [1]	Median [2]	High [3]
2021	0.5%	0.7%	0.9%	0.4%	0.6%	0.6%
2022	0.3%	0.9%	1.4%	0.4%	0.6%	0.9%
2023	0.2%	0.9%	1.7%	0.4%	0.7%	1.0%
2028	0.2%	0.9%	1.6%	0.0%	0.5%	1.1%
2033	0.2%	0.8%	1.3%	0.6%	1.1%	1.6%
2038	0.2%	0.7%	1.2%	0.1%	0.7%	1.3%
2043	0.2%	0.6%	1.0%	0.2%	0.8%	1.4%
2048	0.1%	0.5%	0.8%	0.1%	0.8%	1.3%
2053	0.1%	0.4%	0.7%	0.1%	0.7%	1.0%
2058	-0.1%	0.4%	0.8%	-0.3%	0.0%	0.4%
2063	-0.1%	0.3%	0.8%	-0.4%	0.1%	0.4%
2068	-0.1%	0.3%	0.6%	0.0%	0.2%	0.4%
2073	-0.2%	0.3%	0.6%	-0.1%	0.1%	0.2%
Average [4]	**0.1%**	**0.5%**	**1.0%**	**0.0%**	**0.5%**	**0.9%**

Source: Statistics NZ population projections 2020 - 2073. WARDALE analysis.
1. 5th percentile
2. 50th percentile
3. 95th percentile
4. Compound annual growth rate

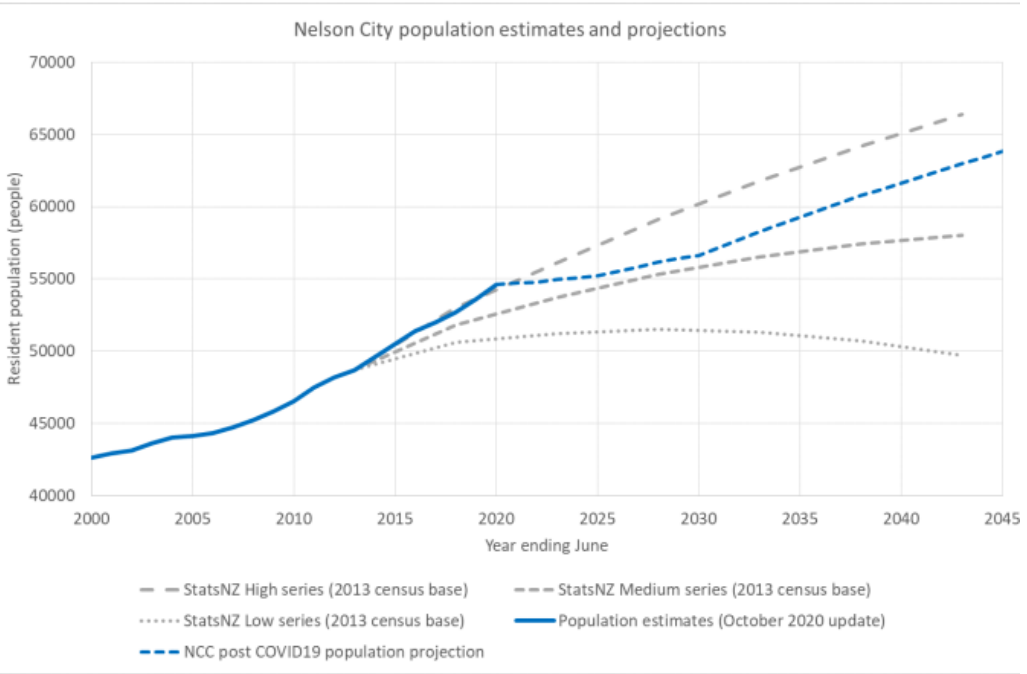
Nelson Long Term Population Growth

Nelson's population estimate of 54,620 is forecast by Council to grow by 11,420 in the period from 2020 to 2050.

- Nelson has been tracking on the Statistics NZ "high" projection path since 2013
- Council future forecast more conservative given COVID. Compound annual growth rate of 0.6% p.a.
- On average, the forecast Nelson annual growth % is similar to the latest Statistics NZ national median projection over the same time period (refer previous slide).

Nelson City Council population projections for LTP and AMPs

Year	Population	Growth%	Year	Population	Growth%
2020	54,620		2036	59,760	0.8%
2021	54,700	0.1%	2037	60,260	0.8%
2022	54,780	0.1%	2038	60,760	0.8%
2023	54,960	0.3%	2039	61,200	0.7%
2024	55,080	0.2%	2040	61,640	0.7%
2025	55,200	0.2%	2041	62,080	0.7%
2026	55,520	0.6%	2042	62,520	0.7%
2027	55,840	0.6%	2043	62,960	0.7%
2028	56,160	0.6%	2044	63,400	0.7%
2029	56,400	0.4%	2045	63,840	0.7%
2030	56,640	0.4%	2046	64,280	0.7%
2031	57,180	1.0%	2047	64,720	0.7%
2032	57,720	0.9%	2048	65,160	0.7%
2033	58,260	0.9%	2049	65,600	0.7%
2034	58,760	0.9%	2050	66,040	0.7%
2035	59,260	0.9%			
Total Increase				**11,420**	
Average Annual Growth (all years) [1]					**0.6%**



Source: Nelson City Council. WARDALE analysis.

1. Compound annual growth rate

WARDALE
marine industry consulting

3. NZ Vessel Demand Growth Estimates

NZ Vessel Demand Growth

WARDALE has analysed NZ vessel number estimates over time using NZ Marine Industry Association data. Vessel annual growth estimates by vessel type are shown in the table below.

- Trailer power boat annual growth expected to be 1.8% p.a. More conservative than long term trend of 3.5%.
- Yacht and launches annual growth expectation is lower at 0.8% p.a., consistent with long term trend
- Jetskis and other small vessel numbers have been growing rapidly but forecasts are more conservative at 1.1% p.a. and 3.5% p.a. respectively
- Anecdotal evidence of COVID travel restrictions driving strong growth in vessel purchases in NZ over the last year

	January 2021			Historical
	Existing Fleet Jan-21	Expected Annual Growth	Expected Annual Growth %	Oct-14 to Jan-21 Annual Growth %
Trailer power boats	208,500	3,500	1.7%	1.8%
Trailer sailor boats	16,100	100	0.6%	0.8%
Total trailer boats	224,600	3,600	1.6%	1.8%
Yachts and launches	24,150	200	0.8%	1.3%
Jetskis [1]	92,000	1,000	1.1%	> 10.0%
Dinghy/inflatables/canoes/SUPs/ Optimists/windsurfers etc [1]	1,142,606	40,000	3.5%	> 5.0%
Commercial boats	7,100	100	1.4%	4.2%
Gross Total	**1,490,456**	**44,900**	**3.0%**	
Less scrapped / exported	n/a	- 6,000	-0.4%	
Net Total	**1,490,456**	**38,900**	**2.6%**	

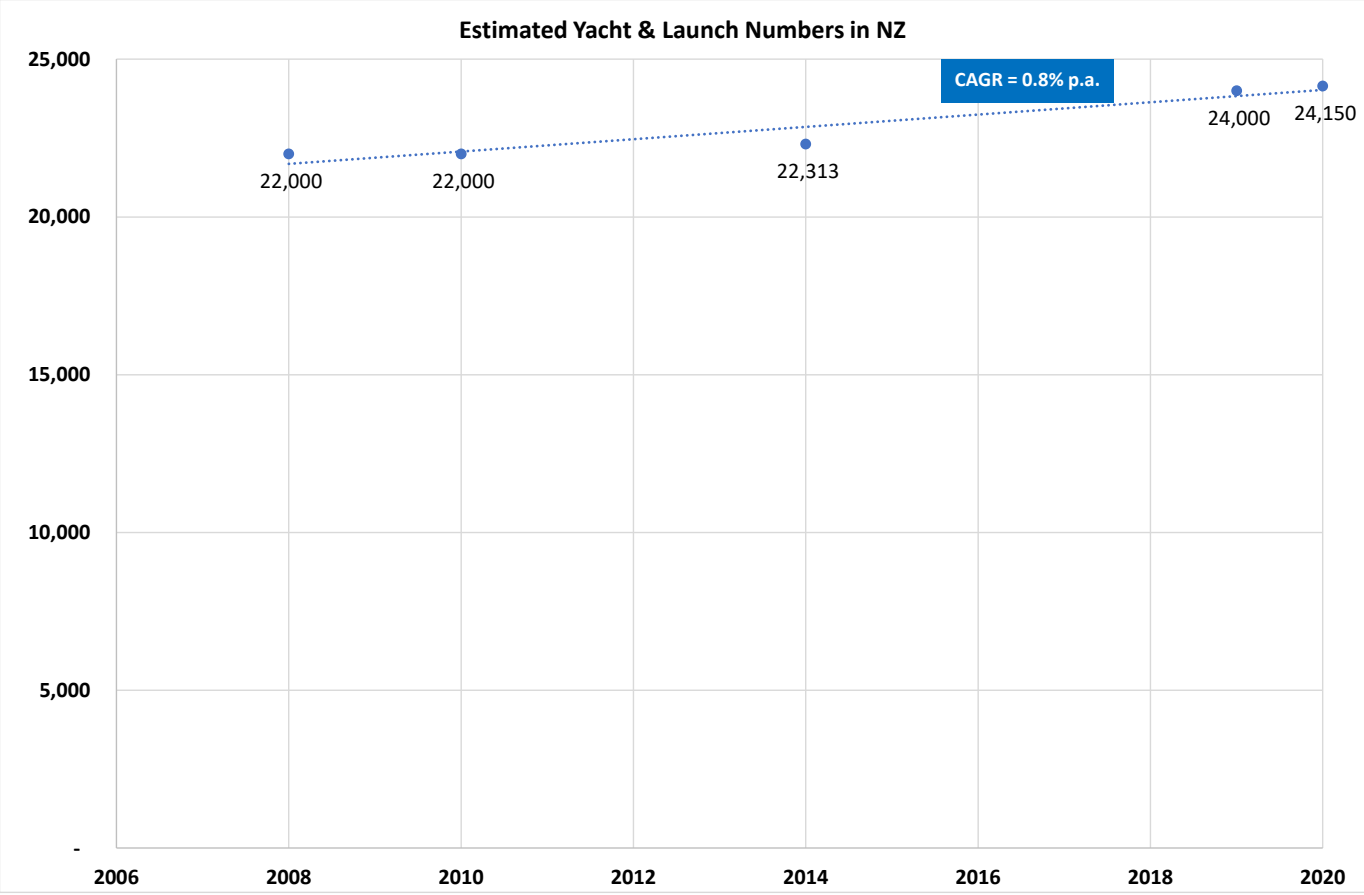
Source: NZ Marine Industry Association data, WARDALE analysis.

1. Change of measurement basis over time so historical annual growth not able to be calculated accurately

Yacht & Launches Vessel Demand Growth

Yacht and launch numbers have grown slowly, at average annual growth rate of 0.8% from ~22,000 in 2008 to ~24,150 in 2020.

- NZ population has grown at average of 1.5% p.a. over the same period
- Implies steady modest underlying demand growth for marina berths

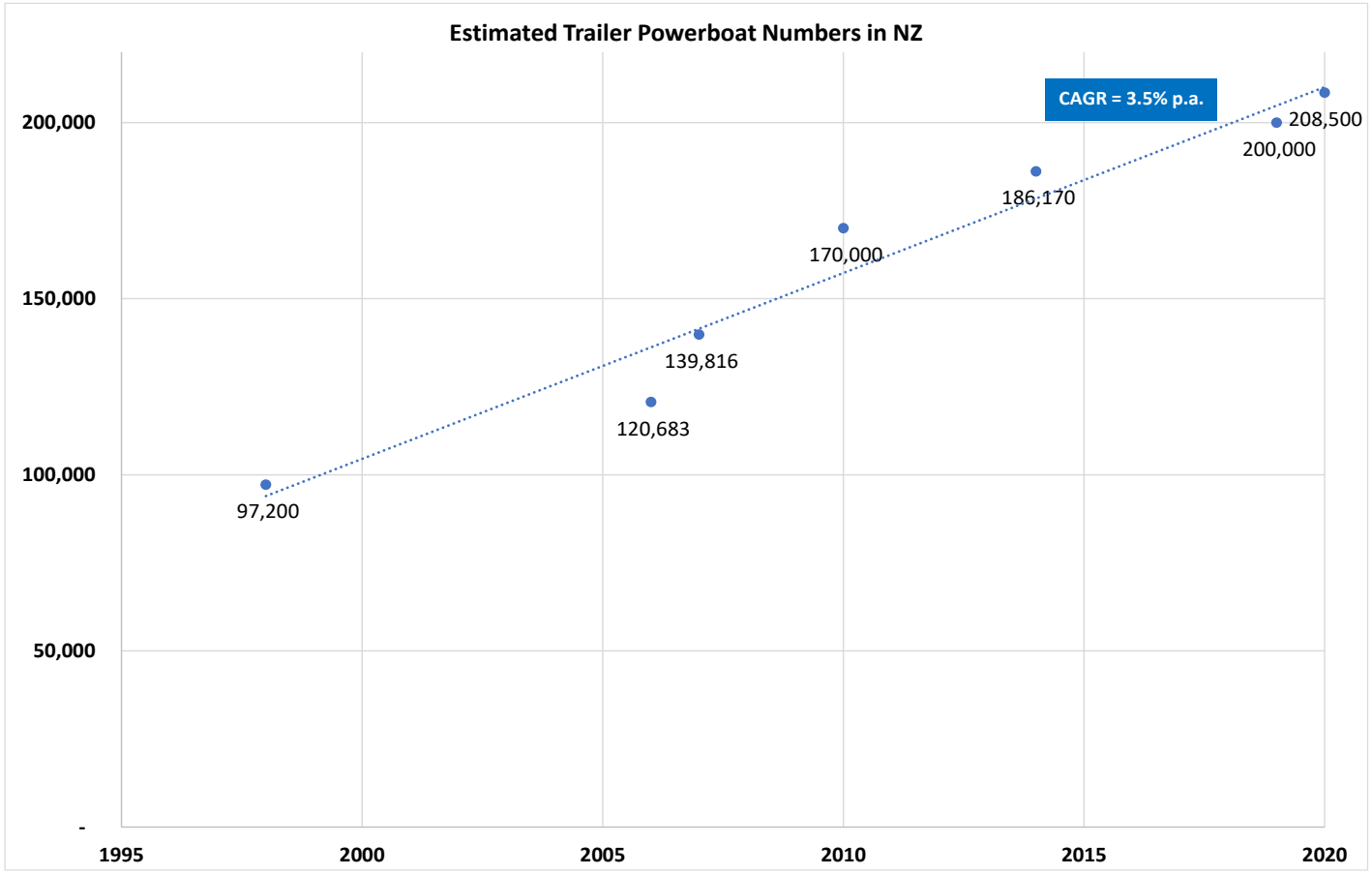


Source: NZ MARINE estimates and Maritime NZ survey data.

Trailer Power Boat Vessel Demand Growth

Trailer power boat numbers have grown rapidly, at average annual growth rate of 3.5% from ~97,200 in 1998 to ~208,500 in 2020.

- NZ population has grown at average of 1.3% p.a. over the same period
- Resulting strong demand for storage and boat launching ramps

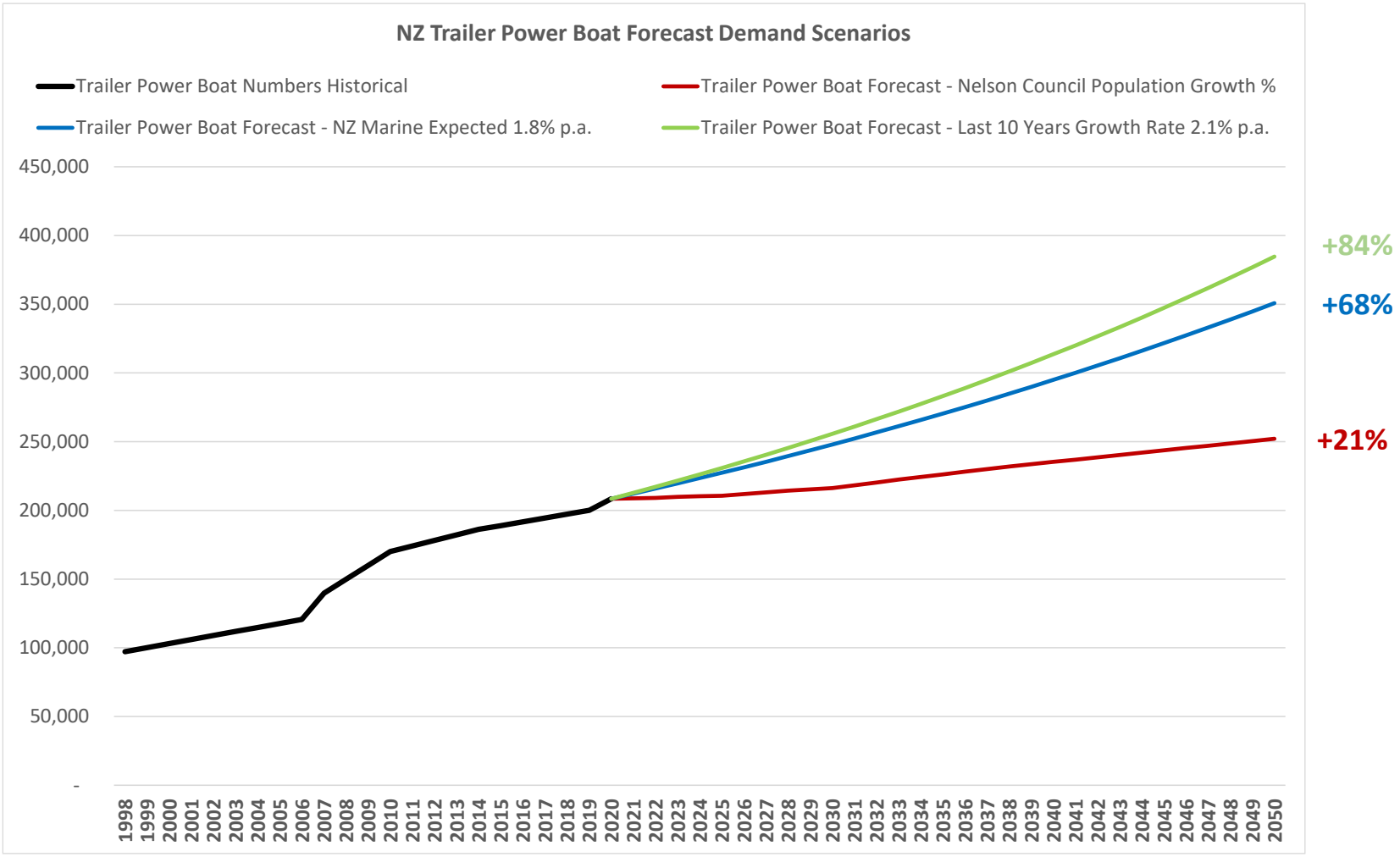


Source: NZ MARINE estimates and Maritime NZ survey data.
Definition of Trailer Power Boat excludes jetskis and other small vessels less than 3.5m length

NZ Trailer Power Boat Forecast Demand Scenarios

Trailer power boat numbers are continuing to experience strong growth which is likely to continue at minimum of population rates and more likely higher. Conservative growth estimates of 68 – 84% in the period to 2050.

- Historical growth 3.5% p.a. since 1998 is unlikely sustainable in long term to 2050 given slower recent trends (and would imply 180% growth in period to 2050)



WARDALE
marine industry consulting

4. Regional Supply & Demand Analysis

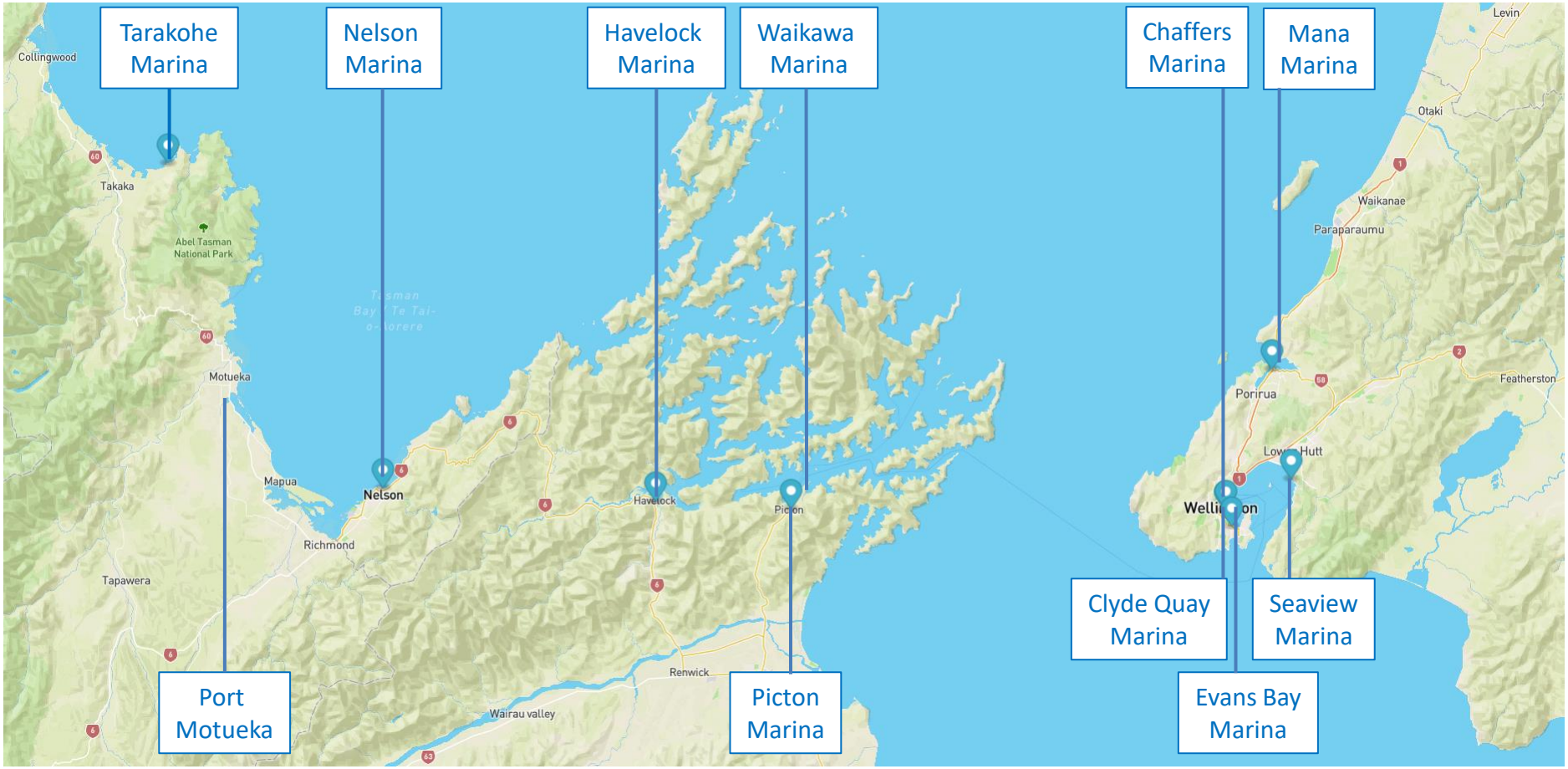
WARDALE
marine industry consulting

4.1 Definition of Regional Area

Regional Supply and Demand Analysis

The regional area of scope for the analysis of supply and demand is defined as the Bottom of the North and Top of the South as shown in the map below.

- This area encompasses 11 marina facilities in the Tasman, Nelson, Marlborough and Wellington regions.



WARDALE
marine industry consulting

4.2 Marina Berth Supply and Demand

Regional Marina Berth Supply

The Nelson/Tasman/Marlborough/Wellington boating region has current supply of ~3,000 marina berths and a further 348 consented for development

- Waikawa North West extension will supply an additional 251 berths. Applications already received for 40% of new berths and management expects to have 75% filled prior to construction completion in 2022
- Motueka and Seaview are both in the process of adding berths within their marinas

Region	Nelson	Tasman		Marlborough			Wellington					
Facility	Nelson Marina	Port Motueka	Port Tarakohe	Havelock Marina	Picton Marina	Waikawa Marina	Seaview Marina	Evans Bay Marina	Mana Marina	Chaffers Marina	Clyde Quay	Total
Marina Berths	552	39	61	340	206	600	352	141	316	185	-	**2,792**
Pile Moorings	38	75	-	-	-	-	-	-	-	-	-	**113**
Swing / Other	1	-	21	-	-	-	-	-	-	-	72	**94**
Existing Berths & Moorings	591	114	82	340	206	600	352	141	316	185	72	2,999
Add Berths Consented	-	25	34	-	-	251	38	-	-	-	-	**348**
Total Berths & Moorings	**591**	**139**	**116**	**340**	**206**	**851**	**390**	**141**	**316**	**185**	**72**	**3,347**
% of Total	**18%**	**4%**	**3%**	**10%**	**6%**	**25%**	**12%**	**4%**	**9%**	**6%**	**2%**	**100%**

Source: WARDALE marina database.
Note: Port Tarakohe's existing 57 marina berths are for a mixture of commercial and recreational vessels with a further 21 swing moorings for recreational users

Identified Potential Future Supply

- Port Tarakohe's planned upgrade including ~34 new recreational marina berths was recently halted by Tasman District Council (since the broader business case was not financially viable under the final PGF loan terms) however they are likely to continue to gradually advance their facilities upgrade, driven by recreational user demand and strong growth acquaculture industry requiring commercial mussel barge berths
- In Wellington, both Evans Bay Marina and Clyde Quay have capacity to expand berth numbers through redevelopment of their underutilised water space
- WARDALE is also aware that a small private marina may also be developed in the Marlborough region

Regional Marina Berth Demand

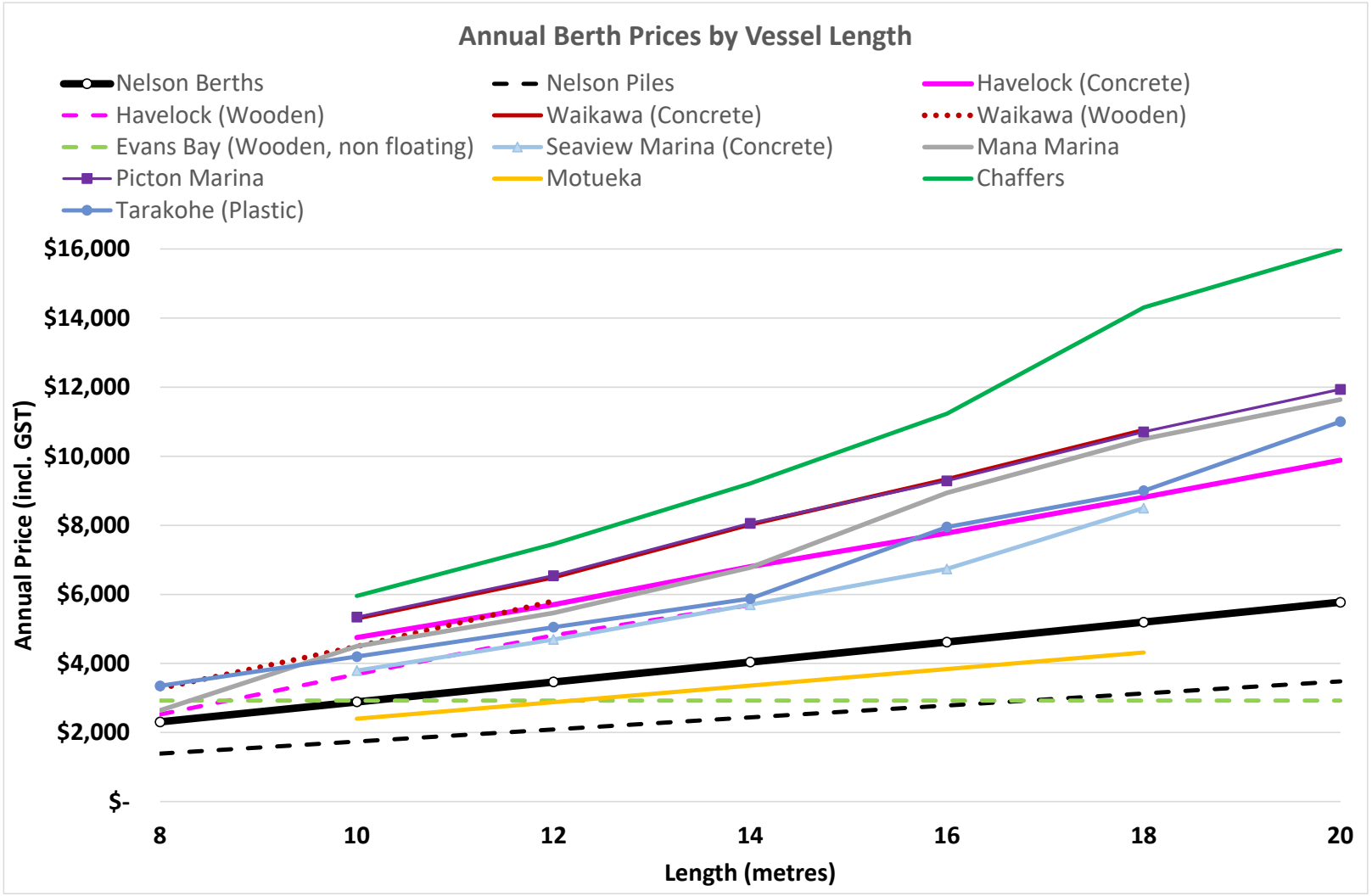
WARDALE's conservative estimate of indicative regional excess demand for marina berths is conservatively 324, which is sufficient to fill almost all of the 348 consented supply of upcoming additional berths.

- Regional marinas are generally at effective full capacity, with the exception of Havelock which has improved its occupancy to 88% in 2020.
- All of the Nelson and Tasman marinas are at capacity and have customer waitlists
- Motueka is confident that its marina expansion of ~25 berths will easily be pre-filled from its waitlist of ~80
- Seaview's waitlist of ~60 should be sufficient to fill its 38 berth expansion
- Waikawa has secured applications for 40% of the 251 new berths in its expansion project (indicates current demand of 100) and management expects 75% pre-filled (~190 customers) when it opens in 2022

Region	Nelson	Tasman		Marlborough			Wellington					
Facility	Nelson Marina	Port Motueka	Port Tarakohe	Havelock Marina	Picton Marina	Waikawa Marina	Seaview Marina	Evans Bay Marina	Mana Marina	Chaffers Marina	Clyde Quay	Total
Occupancy %	97%	100%	100%	98%	100%	97%	100%	95%	90%	100%	98%	
Reported Waitlist	99	80	30	-	40	75	60	32	10	6	9	441
Indicative Excess Demand	64	50	20	-	30	75	40	20	10	6	9	324
Additional Berths Consented	-	25	34	-	-	251	38	-	-	-	-	348

Regional Marina Berth Price Benchmarking

Nelson Marina berth and pile mooring prices for FY2020/21 are relatively low versus marinas in the Tasman, Marlborough & Wellington region. Only the inferior standard marinas at Evans Bay and Motueka are lower.

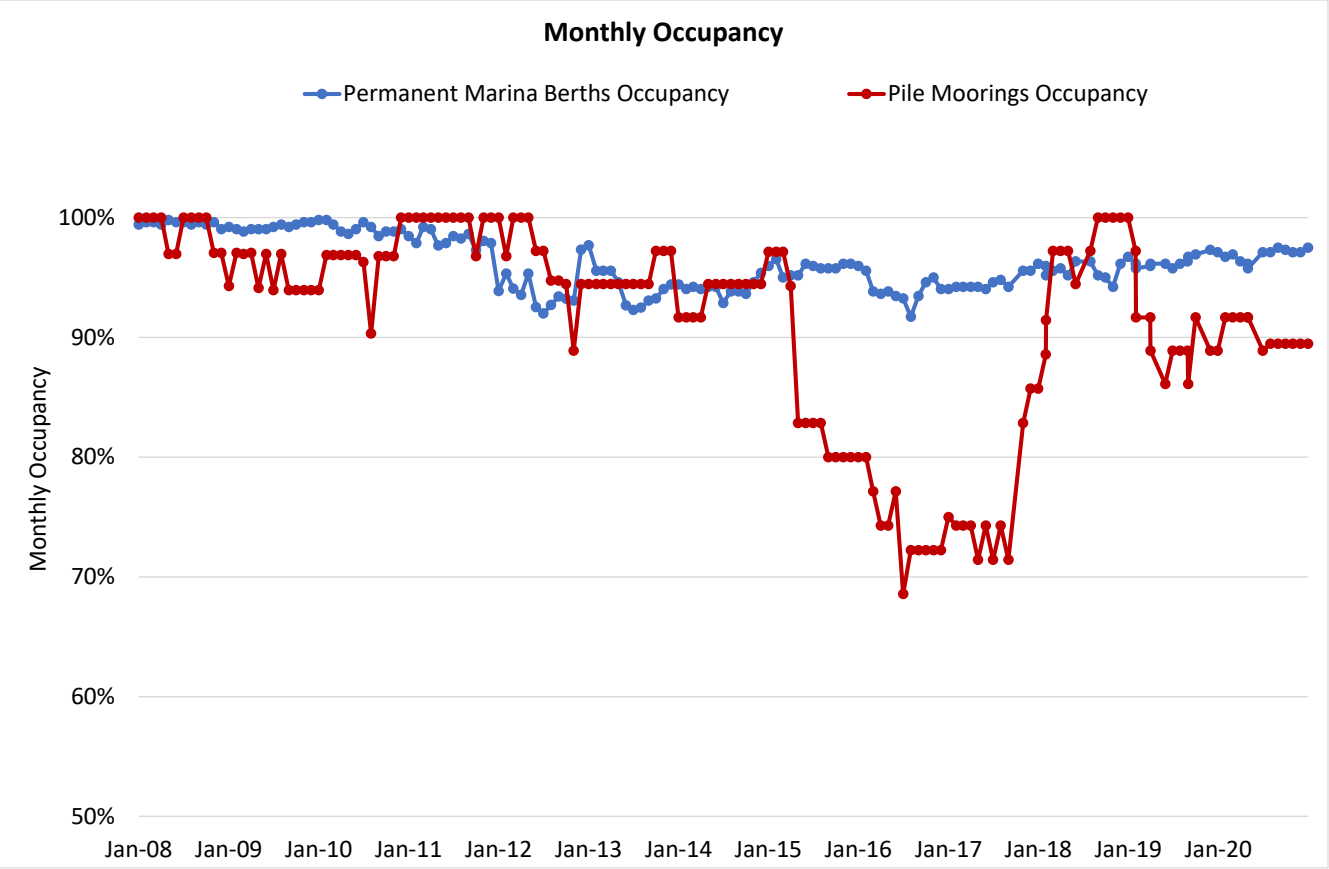


Source: WARDALE marina database.

Nelson Marina: Monthly Occupancy

Permanent marina berth monthly occupancy reported consistently above 90% and currently ~97%

- WARDALE's occupancy calculation as at 11 January 2021 for all pontoon berths (including visitor & temp berths) is ~93% (a total of 36 berths vacant)
- Pile mooring occupancy is more volatile and has reduced in recent years to about 89% currently, due to consistent lack of demand according to the Manager

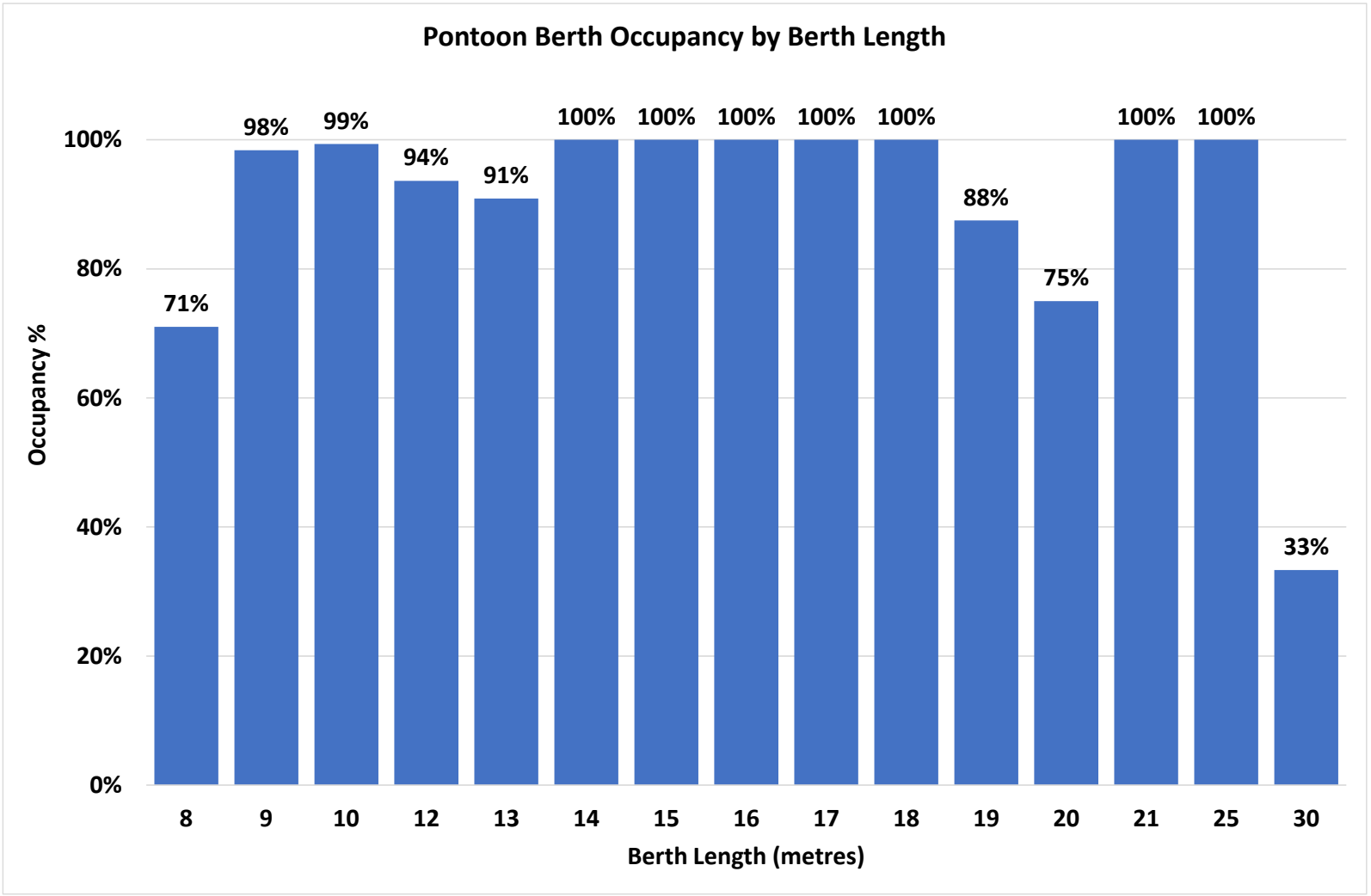


Source: Nelson Marina monthly data Jan 2008 – Dec 2020. WARDALE analysis.

Nelson Marina: Occupancy by Berth Length

Pontoon berth occupancy is at or near capacity across most berth sizes, with exception of 8m, 20m and 30m

- Total vacancy as at 11 January was 36 berths (7% of total)

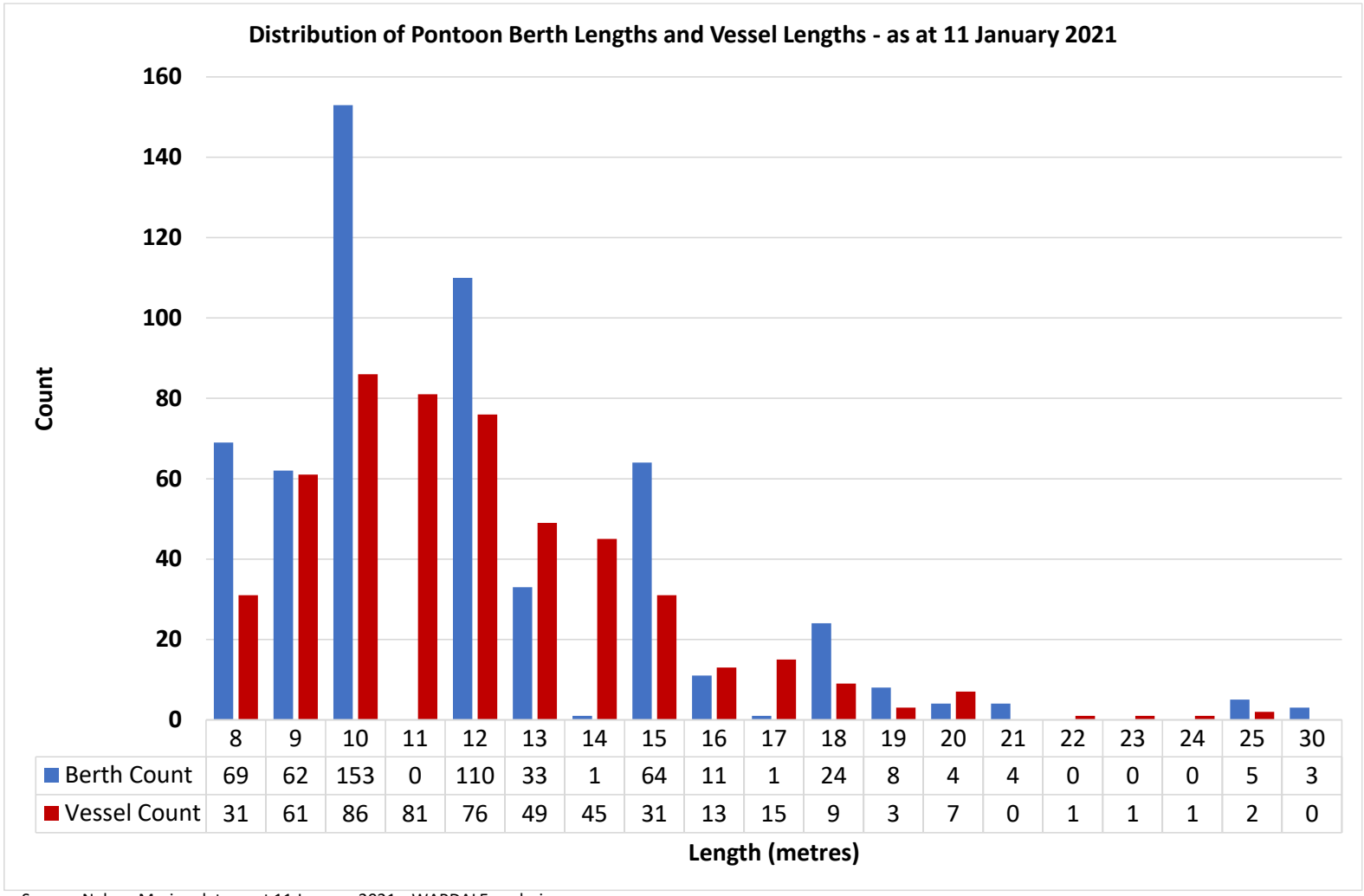


Source: Nelson Marina data as at 11 January 2021. WARDALE analysis.

Nelson Marina: Berth and Vessel Length Distribution

Comparing vessel lengths to marina berth size indicates oversupply of smaller berths: 38 x 8 metre and 67 x 10m

- In total the vessel size range 11m to 17m has excess demand of 90 berths



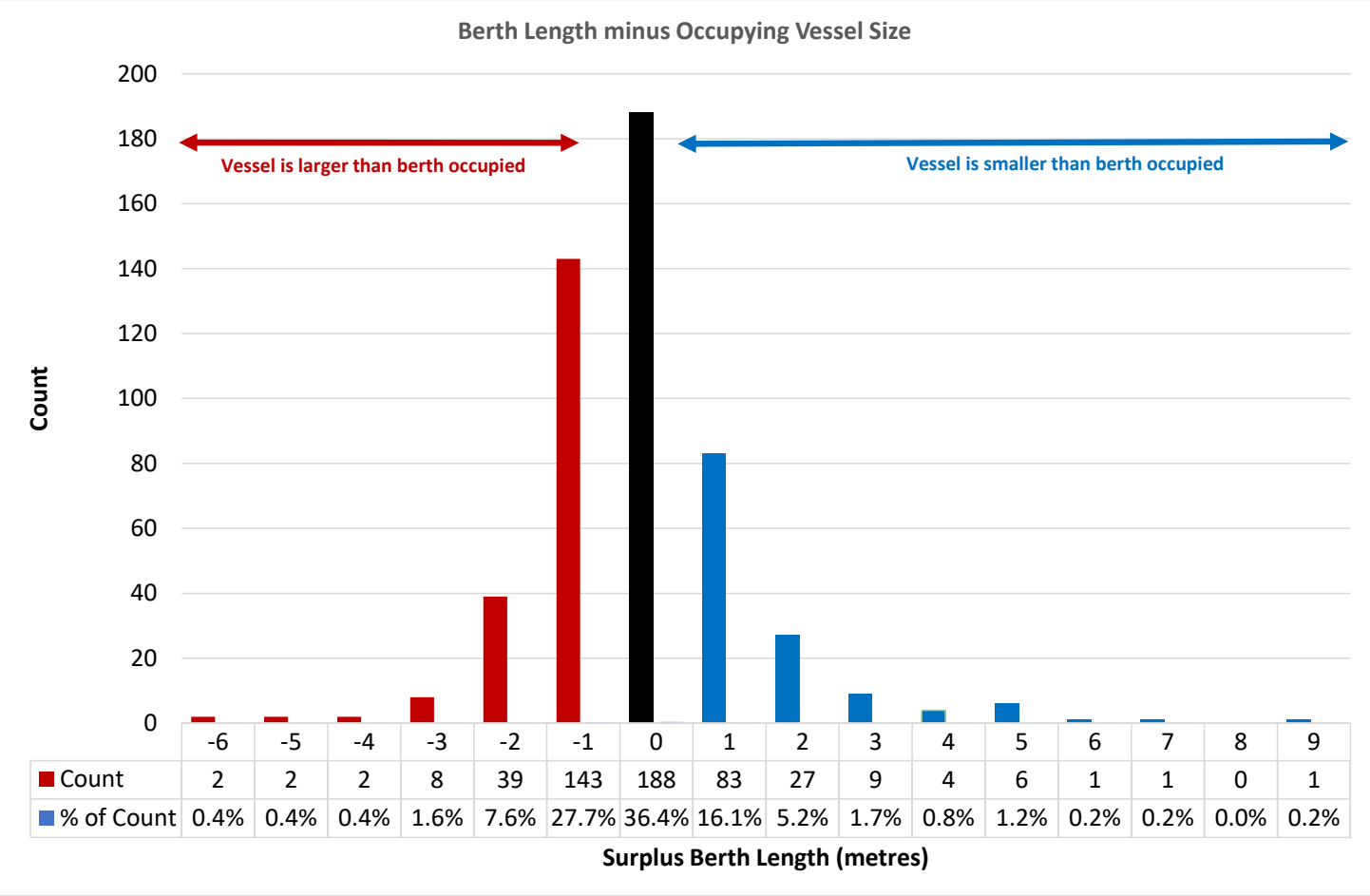
	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	30
Berth Count	69	62	153	0	110	33	1	64	11	1	24	8	4	4	0	0	0	5	3
Vessel Count	31	61	86	81	76	49	45	31	13	15	9	3	7	0	1	1	1	2	0

Source: Nelson Marina data as at 11 January 2021. WARDALE analysis.
Notes: Analysis Excludes pile moorings. 36 berths are vacant.

Nelson Marina: Berth Length Utilisation

Marina is compensating for trend of increasing vessel length by squeezing larger vessels into existing berth sizes

- Of the available vessel length data, 196 vessels exceed the berth length they occupy, most by less than 1 metre, but 53 (10%) by over 1 metre
- Marina charges customers by vessel length not berth size, so no lost revenue



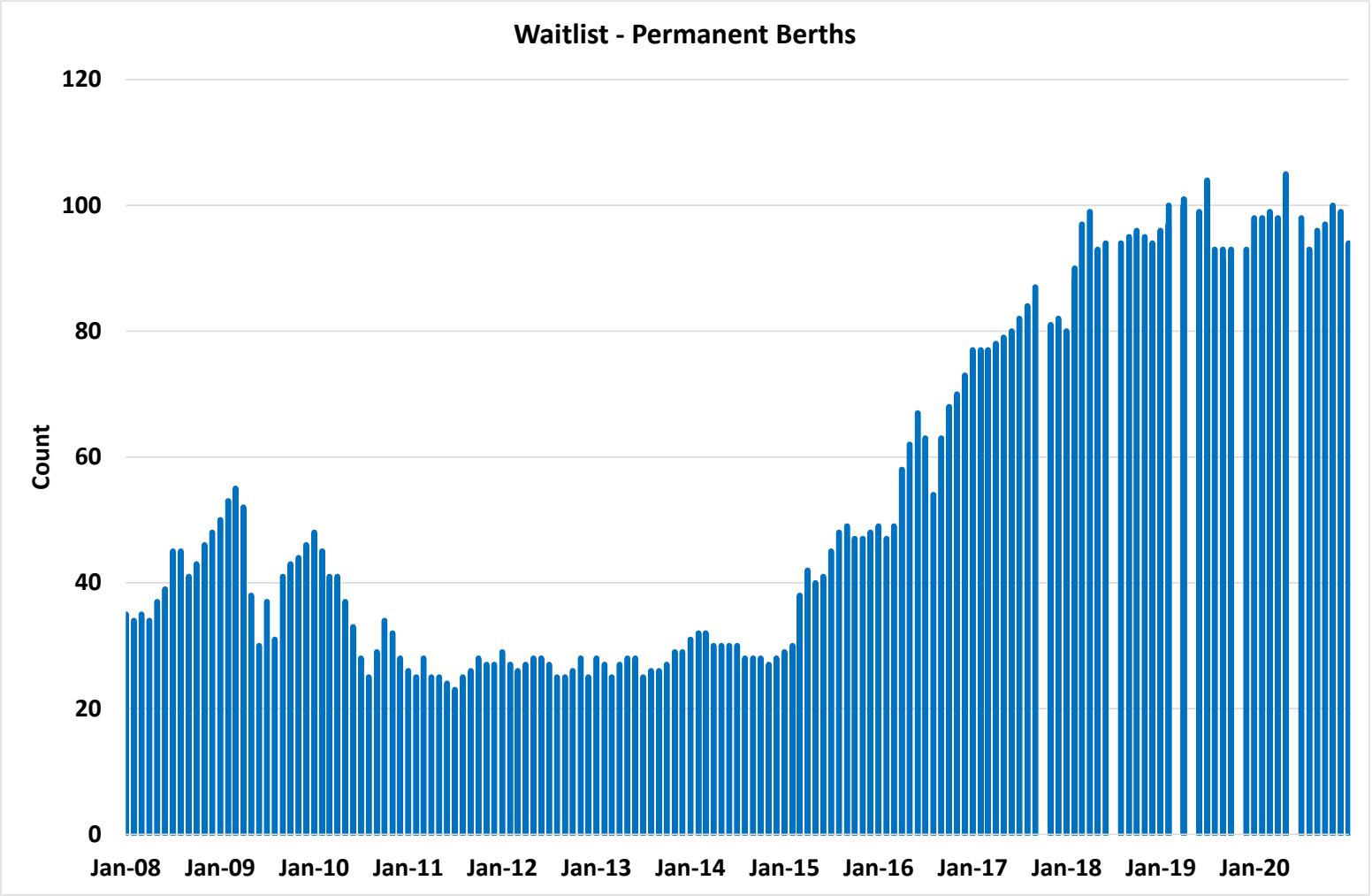
	-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6	7	8	9
Count	2	2	2	8	39	143	188	83	27	9	4	6	1	1	0	1
% of Count	0.4%	0.4%	0.4%	1.6%	7.6%	27.7%	36.4%	16.1%	5.2%	1.7%	0.8%	1.2%	0.2%	0.2%	0.0%	0.2%

Source: Nelson Marina data as at 11 January 2021. WARDALE analysis.
Notes: Analysis excludes pile moorings. 36 berths excluded from analysis due to vacancy.

Nelson Marina: Waitlist for Permanent Berths

Nelson marina's berth waitlist has grown to about 100 customers, who have paid a deposit to register

- More detailed analysis of the composition of the waitlist is provided in the following slides

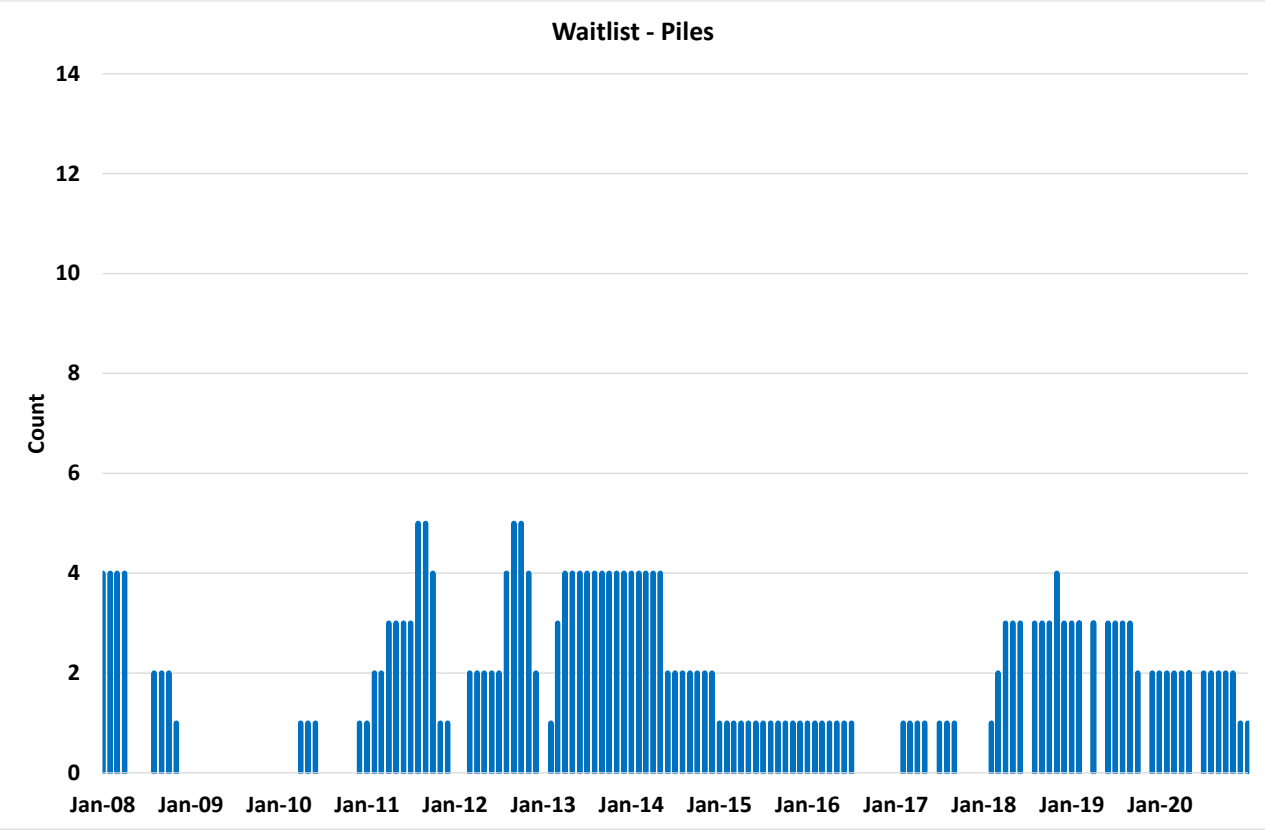


Source: Nelson Marina data January 2008 to December 2020.

Nelson Marina: Pile Mooring Waitlist

The waitlist for pile moorings has remained small over time, with a consistent lack of demand confirmed by the Manager

- This is consistent with higher vacancy levels in the pile moorings (refer to earlier marina occupancy slide)
- Current pile mooring waitlist has only 1 new customer – an 11m vessel waiting for a pile mooring in a specific location

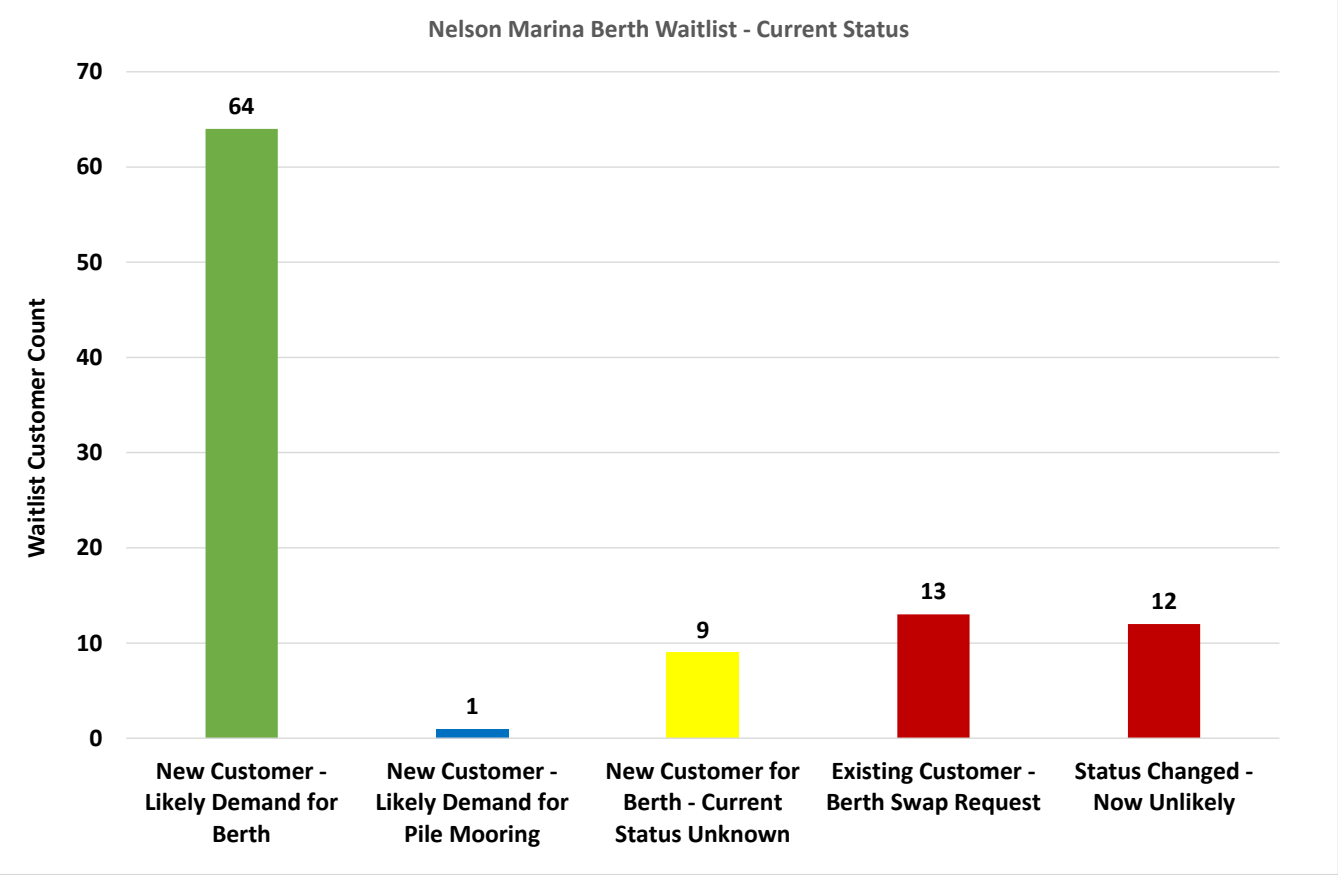


Source: Nelson Marina data January 2008 to December 2020.

Nelson Marina: Current Waitlist Analysis

WARDALE has analysed the current Nelson Marina waitlist in conjunction with Council calls to a sample of customers on the waitlist to confirm their status.

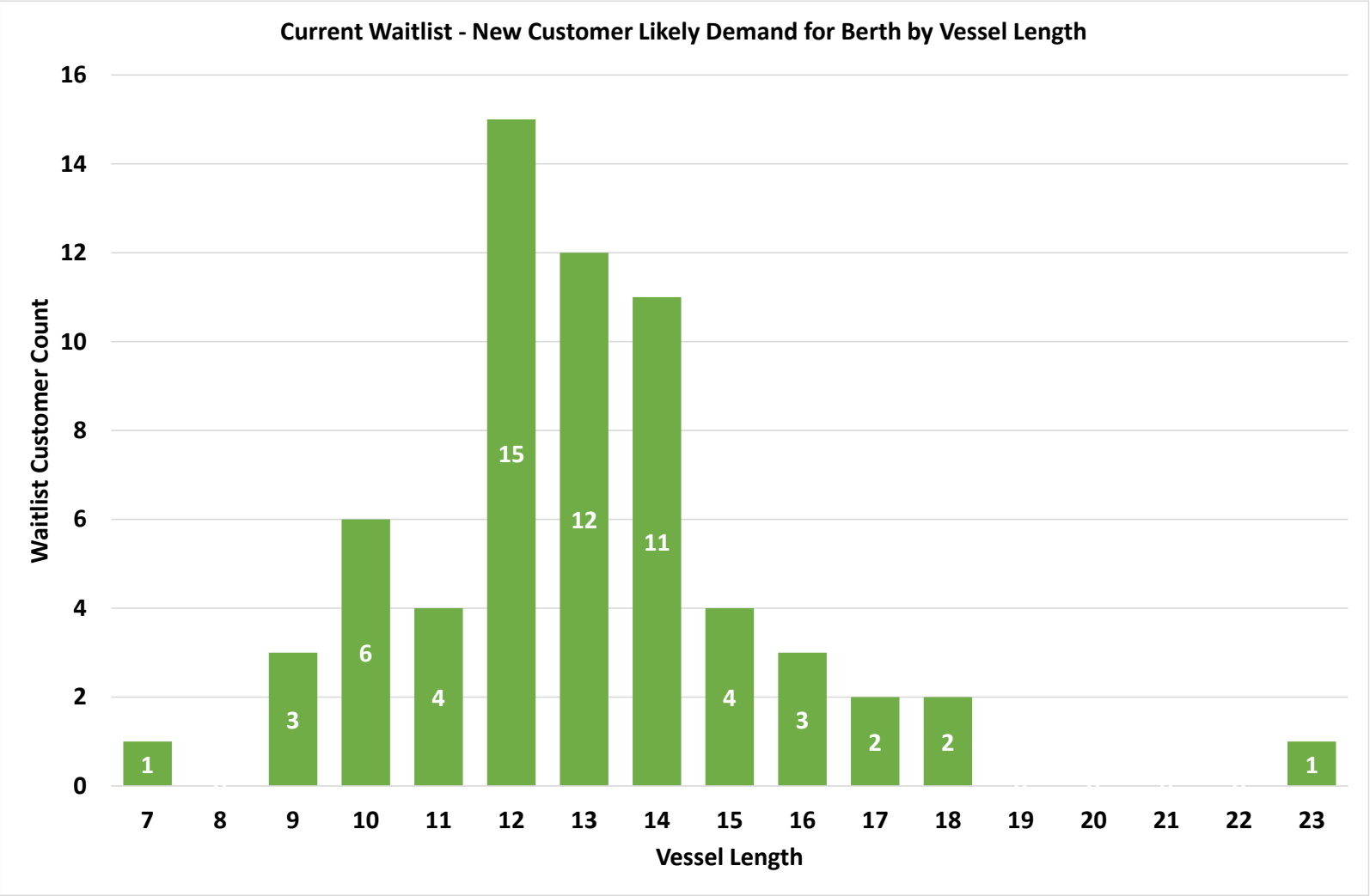
- 99 customers on waitlist for permanent berths (plus 14 wanting trailer boat storage – refer Section 4.4)
- The current status of the 99 berth waitlist customers has been categorised by WARDALE as shown in graph
- Results show 64 new customers assessed as likely demand for new marina berths and 1 for a pile mooring
- 9 waitlist customers have not had any recent contact so current status unknown (and assessed as less likely)



Source: Nelson Marina waitlist as at 18 February 2021 including notes on customer status, WARDALE analysis

Nelson Marina: Current Waitlist – Vessel Length

The 64 new customers on the waitlist with likely demand for a marina berth are most concentrated in the 12 – 14m vessel size range and have an average vessel length of 13.0 metres

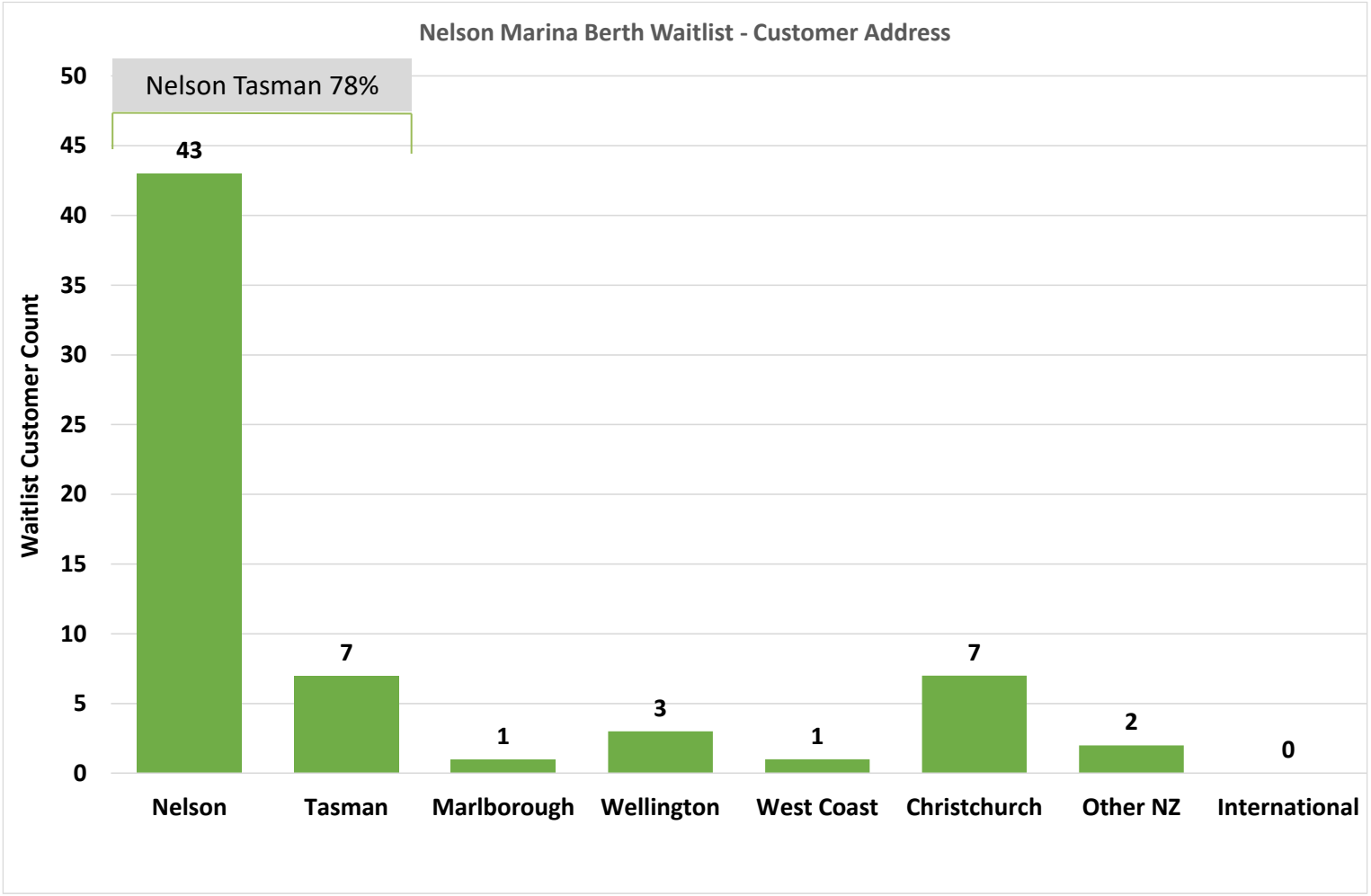


Source: Nelson Marina waitlist as at 18 February 2021, WARDALE analysis. Includes marina berths only, excludes a request for 1 pile mooring

Nelson Marina: Current Waitlist – Customer Location

Of the 64 new customers registered on the waitlist with likely demand for marina berths, 50 are in the Nelson Tasman region (78%)

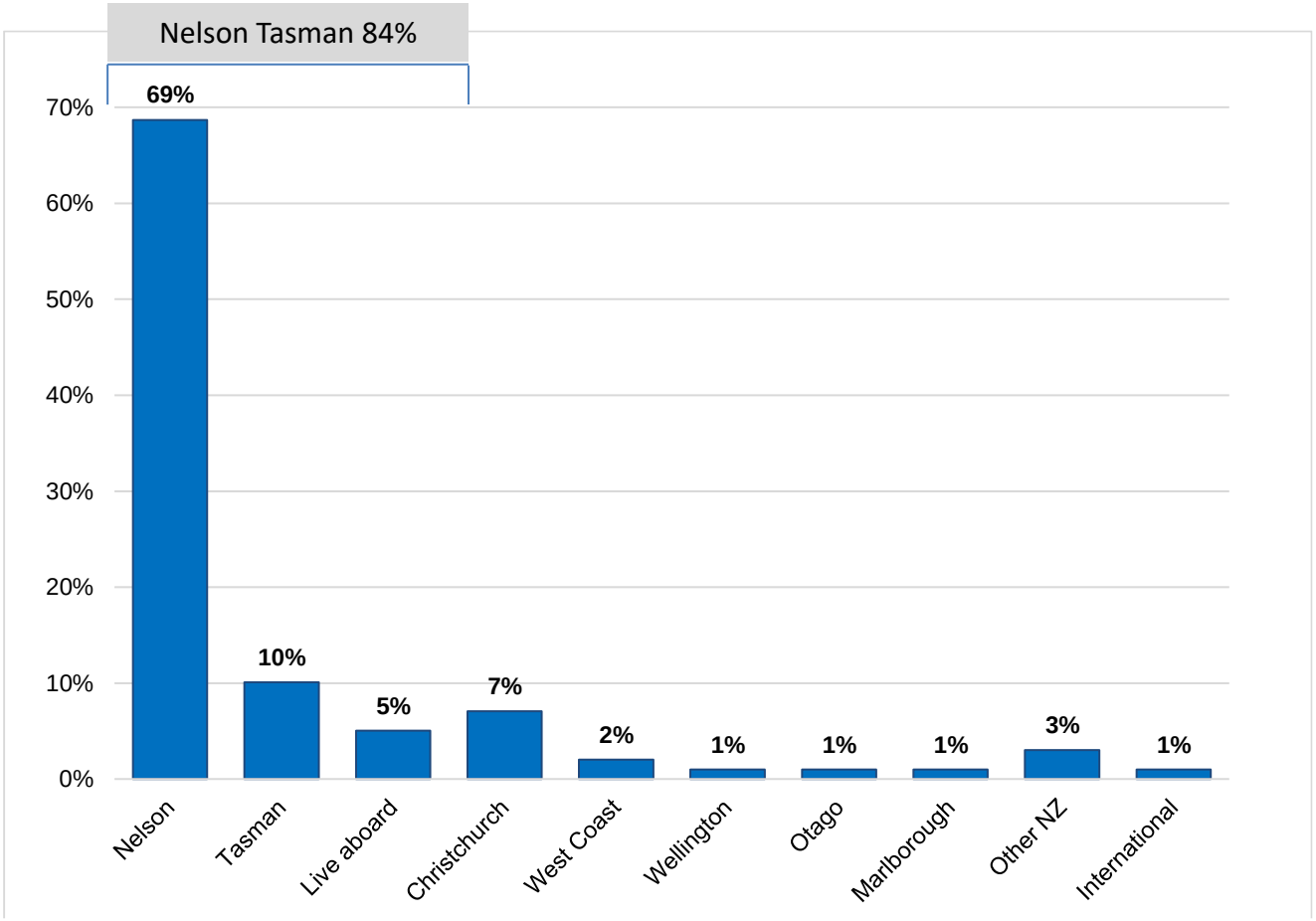
- New customer demand location is broadly consistent with the existing marina customer base (refer to next slide)
- There is also 1 customer in Marlborough and 3 in Wellington bringing the regional total to 54 (84%)



Source: Nelson Marina waitlist as at 18 February 2021, WARDALE analysis. Includes marina berths only, excludes a request for 1 pile mooring.

Nelson Marina: Existing Customer Location

2017 data for Nelson Marina's existing berth holders indicates ~84% are from the Nelson/Tasman region including liveaboards

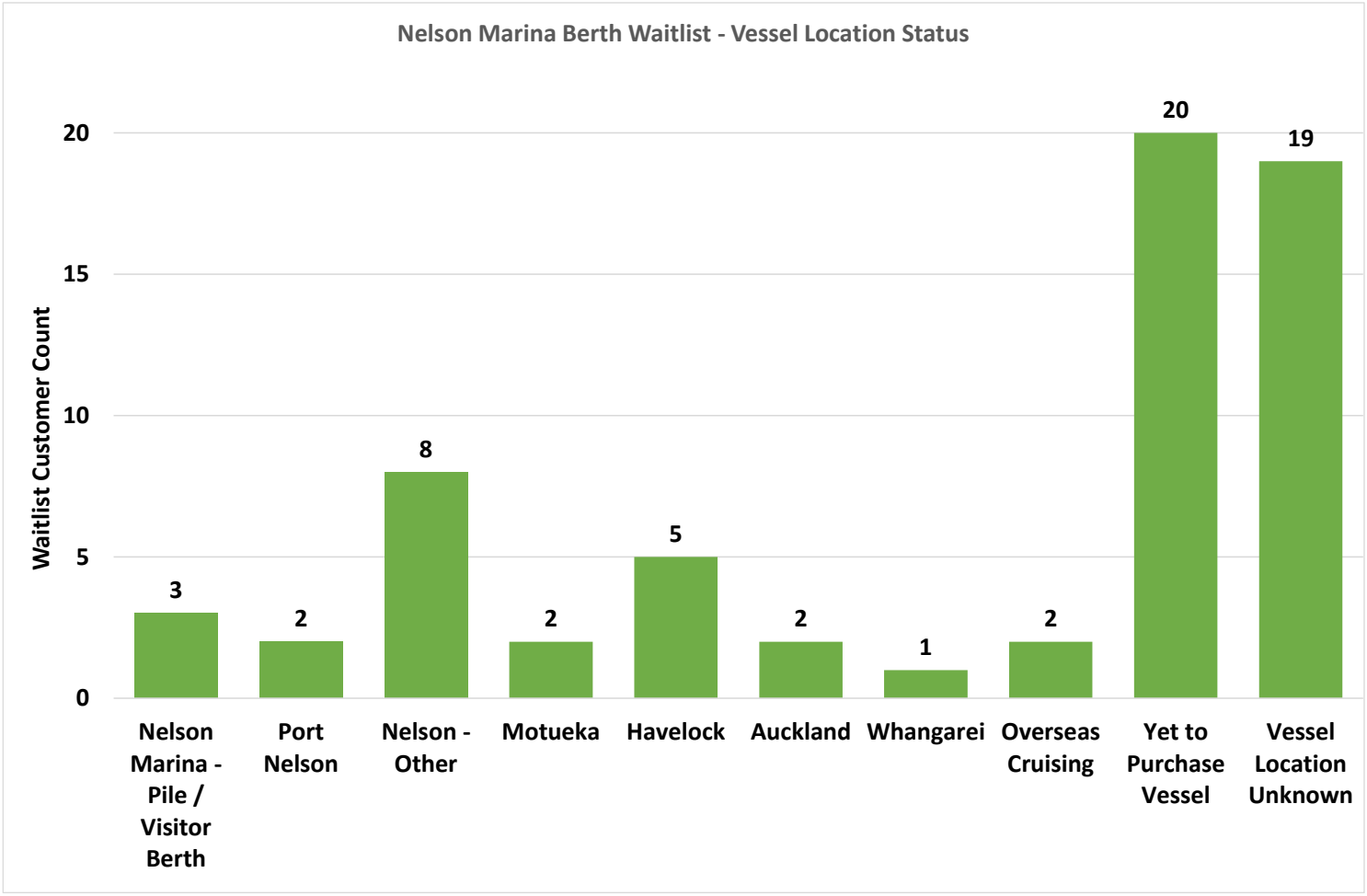


Source: Nelson City Council Customer Survey 2017, Rob Greenaway & Associates

Nelson Marina: Current Waitlist – Vessel Location

Of the 64 new customers on the waitlist with likely demand for a marina berth, 45 have known vessel location status that is broken down as follows:

- 20 customers (45%) are yet to purchase a vessel
- 13 vessels (29%) are located in Nelson, 7 vessels (15%) in Tasman/Marlborough region and 5 elsewhere (11%)



Source: Nelson Marina waitlist as at 18 February 2021, WARDALE analysis

Nelson Marina: Current Waitlist – Existing Customer Berth Swaps

Of the 13 existing customers on the waitlist requesting a berth swap – 11 have a current assessed status of likely that is broken down as follows:

- 6 existing customers want to move an existing vessel to another berth
- 5 existing customers are waiting for a larger berth to purchase a new vessel to replace their existing vessel
- No customers are waiting to swap to a smaller berth
- Berths swaps have no net impact on total demand, but they change berth length demand

Customer Count	Berth Swap Request	Existing Vessel Length (m)	New Vessel Length (m)
1	Larger Berth	10	15
2	Larger Berth	12.5	15
3	Larger Berth	11.3	19
4	Larger Berth	15	18
5	Larger Berth	15.5	16

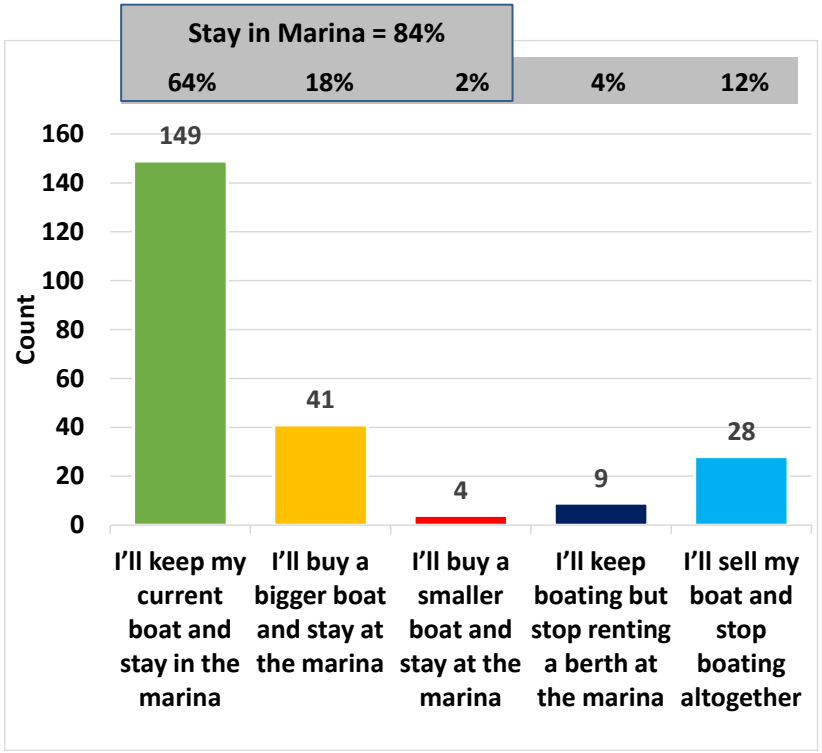
Source: Nelson Marina waitlist as at 18 February 2021, WARDALE analysis

Nelson Marina: Customers' Future Boating Intentions

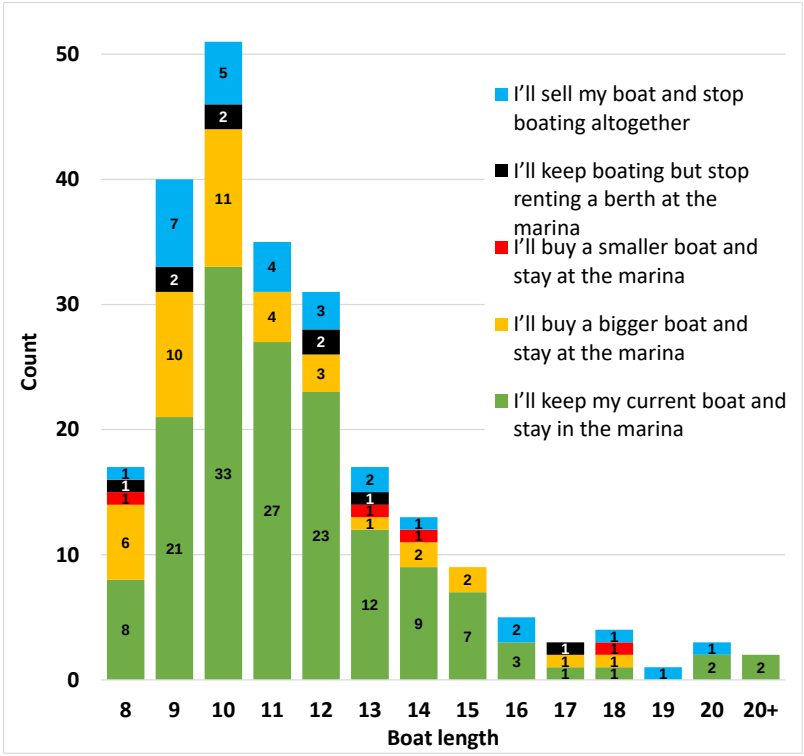
The 2017 customer survey results regarding future user intentions over next five years indicate ~85% of the 241 respondents intended to stay in Nelson Marina

- Remainder: 12% intended to sell vessel and stop boating; 4% intended to stop renting a berth but keep boating
- Of those intending to stay, 77% intended to keep same boat, 21% buy larger boat and only 2% buy smaller boat
- Note that the ratio of customers shifting to larger boat vs smaller boat is over 10 : 1 consistent with macro trend
- Nearly four years have now past since survey, so it would be timely for Council to commission a survey update to confirm level of future demand from existing customers

Future Boating Intended Activity in Five Years (Totals)



Future Boating Intended Activity in Five Years (by Vessel length m)



Source: 2017 Nelson Marina, Wait-list and Akersten Street Boat Ramp Survey, Rob Greenaway & Associates

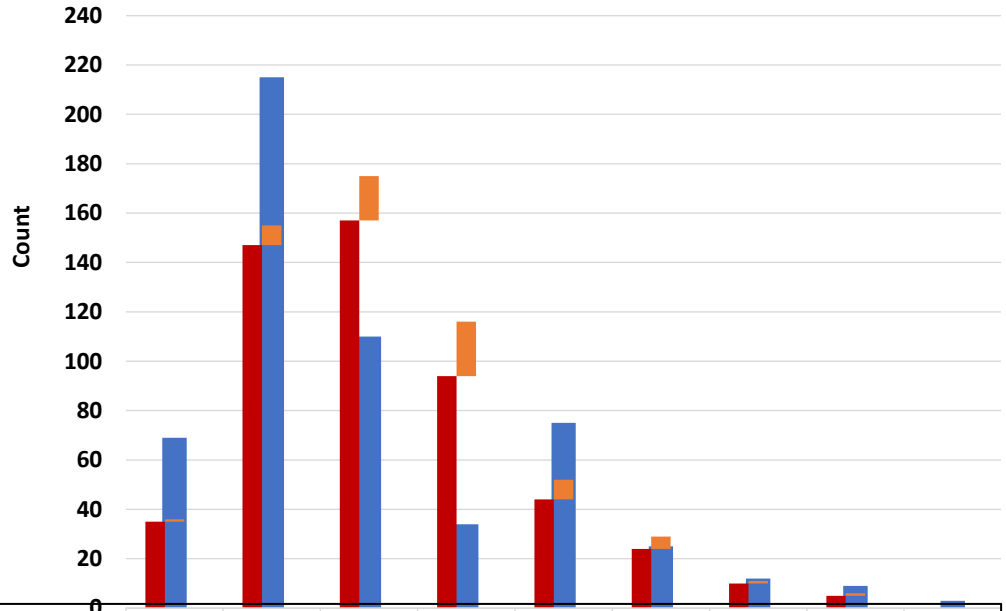
Nelson Marina: Vessel Demand including Waitlist

Including current waitlist and berth swap changes, Nelson Marina has current demand for 580 pontoon berths which exceeds supply of 552 by 28.[1] Large oversupply of small berths and undersupply of 11 – 14m.

- Supply of 8 – 10m exceeds current demand by 93
- Supply of 11 – 14m shortfall vs current demand is 147
- Supply of 15m – 16m exceeds current demand by 23
- Supply of 17 – 25m berths approximately matches demand
- No demand for 30m berths

Reconfiguration opportunity

Pontoon Berth Length Supply vs Indicative Current Vessel Length Demand



Berth Length (metres)	8	9 - 10	11 - 12	13 - 14	15 - 16	17 - 18	19 - 20	21 - 25	26 - 30
Total Berth Supply	69	215	110	34	75	25	12	9	3
Total Berth Demand	36	155	175	116	52	29	11	6	0
Likely Waitlist & Swaps Demand	1	8	18	22	8	5	1	1	0
Vessel Count	35	147	157	94	44	24	10	5	0

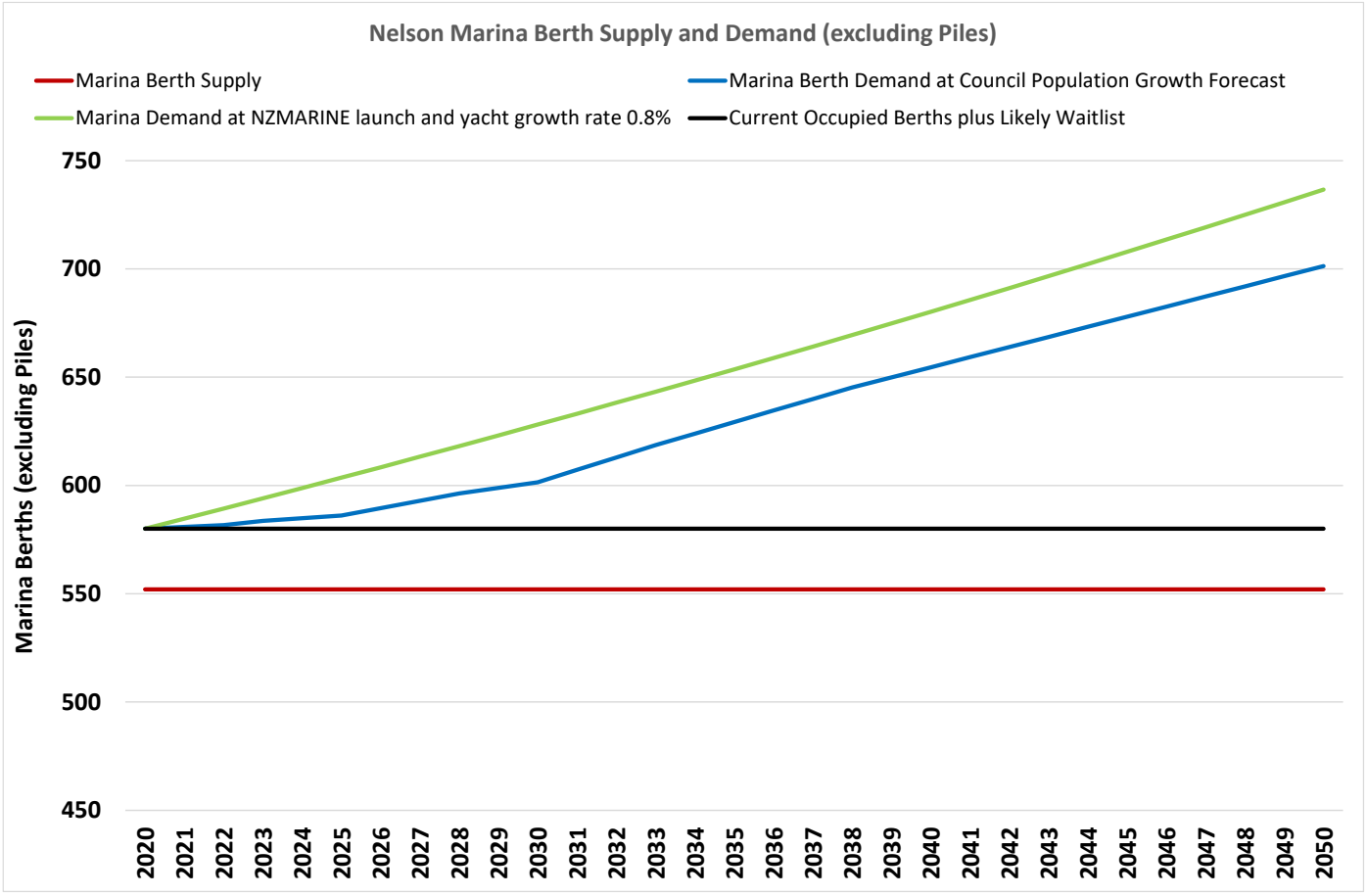
Source: WARDALE analysis, Council forecast population rates

1. If also include excess demand due to berth mismatches, this would increase current excess demand from 28 to the current likely waitlist total of 60.

Nelson Marina Forecast Demand Scenarios

Excess demand for Nelson Marina berths is expected to grow from ~28 currently to in the range of 149 – 185 in the period to 2050

- Size mismatches ignored since likely to be addressed by berth reconfiguration during the forecast horizon[1]
- Berth reconfiguration to align size and conversion of ~35 pile moorings to pontoon berths would only cover short term demand (and possibly less due to the greater waterspace required by larger berths)



Source: WARDALE analysis, Council forecast population rates

1. If also include excess demand due to berth mismatches, this would increase current excess demand from 28 to the current likely waitlist total of 60.

WARDALE
marine industry consulting

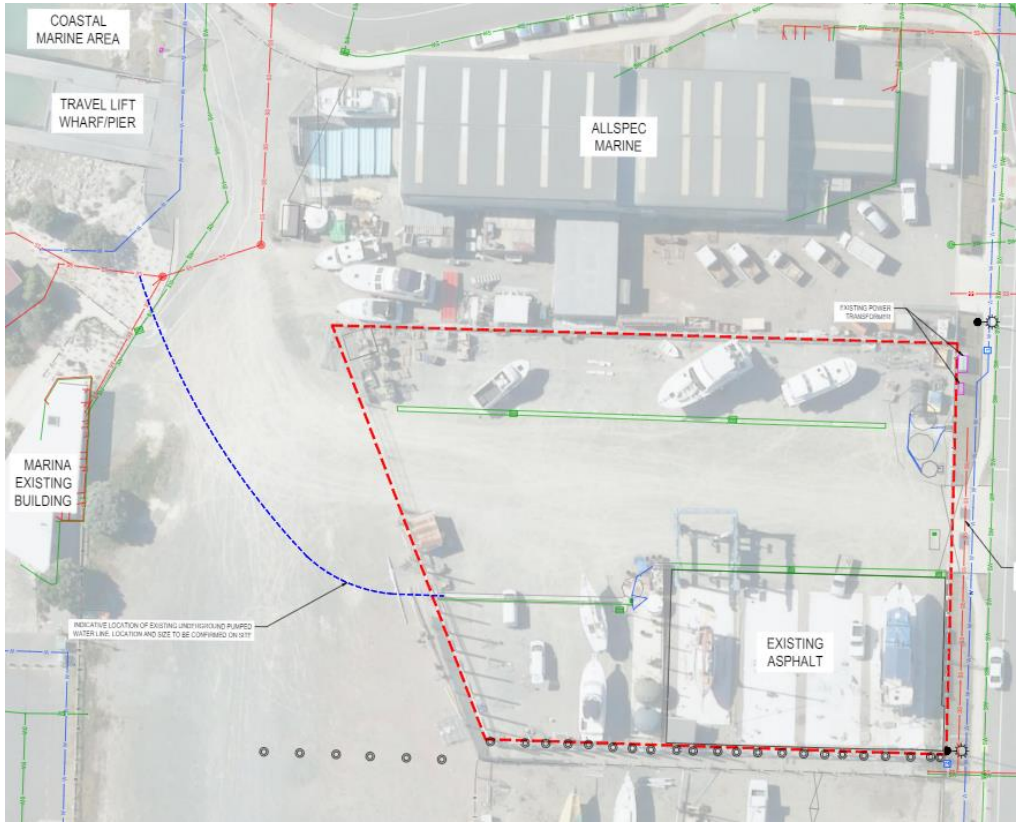
4.3 Haulout & Hardstand

Current Nelson Marina Hardstand

The existing Nelson Marina hardstand only has capacity for 6 large berths (at the South) and 8 small berths (to the North)

- Original marina resource consent required 80 hardstand bays
- Resource consent hardstand requirement subsequently reduced to 3,500m2
- Current hardstand area is ~3,050m2, plus ~850m2 for accessway to travel lift wharf excluding washbay
- Image of existing hardstand below shows inefficient layout of large boats in the northern bays
- Current project is sealing the existing hardstand and installing new drainage systems
- No sheds to provide protection from weather and wind

	Existing	After Current Works Completed
Hardstand Bays:		
Large Sealed Bays	4	6
Large Unsealed Bays	2	-
Small Sealed Bays	-	8
Small Unsealed Bays	8	-
Total Hardstand Bays	**14**	**14**
Hardstand Area:		
Hardstand Compound m2	3,050	3,050
Accessway to Wharf m2	850	850
Total Hardstand Area m2	**3,900**	**3,900**



Hardstand – Previous Report Findings

Recent consultant reports found that Nelson Marina vessels have high levels of fouling due to infrequent haulout, high pricing, a shortage of hardstand bays and lack of enforcement

Marine Biologic (2018)

- Marina industry guidance is to have hardstand spaces for 10% of the resident fleet at any time, which implies ~60 bays at Nelson [1]
- Travel lift capacity is 50 tonnes and can lift vessels up to 25 metres and 6 metres wide.

Lawless Edge (2019)

- In NZ at least 1/3 of recreational vessels are not being slipped and cleaned regularly and a further 1/3 are being cleaned outside the main vessel hardstands (usually in-water or intertidally) with risk of spreading marine pests
- Vessels from the Nelson Tasman region have higher rates of conspicuous fouling (14%) than Marlborough (6%) or visiting vessels (4%)[2]
- Over 6 years there was no appreciable improvement in the state of recreational vessel hulls in the Nelson and Tasman regions despite extensive awareness and education campaigns
- Shortfall across Nelson & Tasman region of 30 hardstand bays. Only other viable location to develop additional capacity is Motueka.
- The Nelson travel lift is reported to be oldest operating in NZ, certified up to 45 tonnes (25m length, 6m width), needs upgrade and deeper water access
- Tidal grid used infrequently and lack of environmental standards
- Potentially feasible locations for hardstand developments include Nelson, Motueka, Waitapu and Tarakohe
- Decision required whether Nelson pursues industry hub strategy (~60 bays minimum to service 1,000 vessels in Nelson Tasman region) or multiple facilities (with Nelson at ~30 bays)
- Desirable to initially upgrade Nelson to 20 bays and reserve adjacent land for a further 20 bays if needed

1. Lawless Edge further indicates that this approach assumes that the hardstand receives 40% of its customers from outside the marina
2. Conspicuous fouling was defined as level 4 or higher on a defined scale. This is equivalent to 16% of the hull covered in marine organism growth excluding slime.

Hardstand – Previous Report Findings (Cont'd)

Nelson Council Business Case for Hardstand Development (2020)

- Council's Science and Environment team and surveys by the Top of the South Marine Biosecurity Partnership indicate the number of fouled boats in Nelson is increasing and creating biosecurity risks
- Nelson lost its PoFA status for recreational vessels in May 2018 when new biosecurity standards came into force requiring an MPI approved transitional facility for haulout and decontamination.
- International arrivals being washed down in Picton and customs officers travel from Nelson to Picton to clear the vessel
- Only six locations now meet the PoFA requirements for recreational vessels – Opua, Whangarei, Auckland (superyachts only), Tauranga, Waikawa and Lyttelton
- For current marina size, biosecurity officers across Nelson and Tasman calculated a region wide shortfall of 30 bays. Nelson assessed to be the best location able to potentially provide 30 bays, with Motueka the only other viable option for a regional hub.
- Some operational issues raised in consultants reports have since been addressed e.g. enforcement of standards

Nelson Council Asset Management Plan Draft (2021)

- The Nelson Marina travel lift can be used for up to 65 hours per week during busy periods
- Budget in AMP of $800k for renewal of travel lift in 2022

1. Conspicuous fouling was defined as level 4 or higher on a defined scale. This is equivalent to 16% of the hull covered in marine organism growth excluding slime.

Hardstand Regional Supply & Demand

Analysis of major regional hardstands shows an undersupply of hardstand bays relative to ideal industry target levels around 10% of berth numbers. Nelson Marina has the largest shortfall, with its ratio only ~2%.

- Waikawa services the 3 Port Marlborough marinas along with private slipways – all busy
- Customers regularly come from Nelson (~10%) due to lower pricing, better facilities, to avoid dust
- Some hardstand facilities are operated by clubs e.g. Evans Bay and Mana Marina
- Seaview Marina has full occupancy in its hardstand sheds and their experience showed large sheds are best
- Port Motueka has two areas which are unsealed and not operating at Council standards. Potential future development of reclamation with capacity for up to 40 new hardstand bays, remains uncertain (refer next slide)
- Nelson Port Slipway has 12 hardstand bays, about half (6) are available for recreational. PGF funding approved for Aimex & Nelson Port to upgrade Nelson Slipway to a 400 tonne travel lift.
- Region has limited haulout infrastructure and hardstand for wide catamarans (Motueka and Seaview trailers)

Region	Nelson		Tasman		Marlborough			Wellington					
Facility	Nelson Marina	Nelson Port Slipway	Port Motueka	Port Tarakohe	Havelock Marina	Picton Marina	Waikawa Marina	Seaview Marina	Evans Bay Marina	Mana Marina	Chaffers Marina	Clyde Quay Marina	Total
Travel Lift Tonnes	45	130	n/a	n/a	n/a	n/a	35	50	35	30	40	n/a	**n/a**
Hardstand Bays	14	12	10	-	4	-	50	30	17	27	1	-	**165**
Hardstand Area m2	3,050	2,000	3,350	-	1,000	-	7,200	8,600	2,675	5,600	240	-	**33,715**
Existing Berths & Moorings	**591**	**-**	**114**	**82**	**340**	**206**	**600**	**352**	**141**	**316**	**185**	**72**	**2,999**
Hardstand Bays per Berth	**2%**	**n/a**	**9%**	**-**	**1%**	**-**	**8%**	**9%**	**12%**	**9%**	**1%**	**-**	**6%**
Shortfall Bays vs 10% Ratio	**45**	**(12)**	**1**	**8**	**30**	**21**	**10**	**5**	**(3)**	**5**	**18**	**7**	**135**
Hardstand Area m2 per Berth	**5**	**n/a**	**29**	**-**	**3**	**-**	**12**	**24**	**19**	**18**	**1**	**-**	**11**
By Sub Region Area	**Nelson/Tasman**				**Marlborough**			**Wellington**					
Hardstand Bays per Berth	**5%**				**5%**			**7%**					**6%**
Shortfall Bays vs 10% Target	**43**				**61**			**32**					**135**
Hardstand Area m2 per Berth	**11**				**7**			**16**					**11**

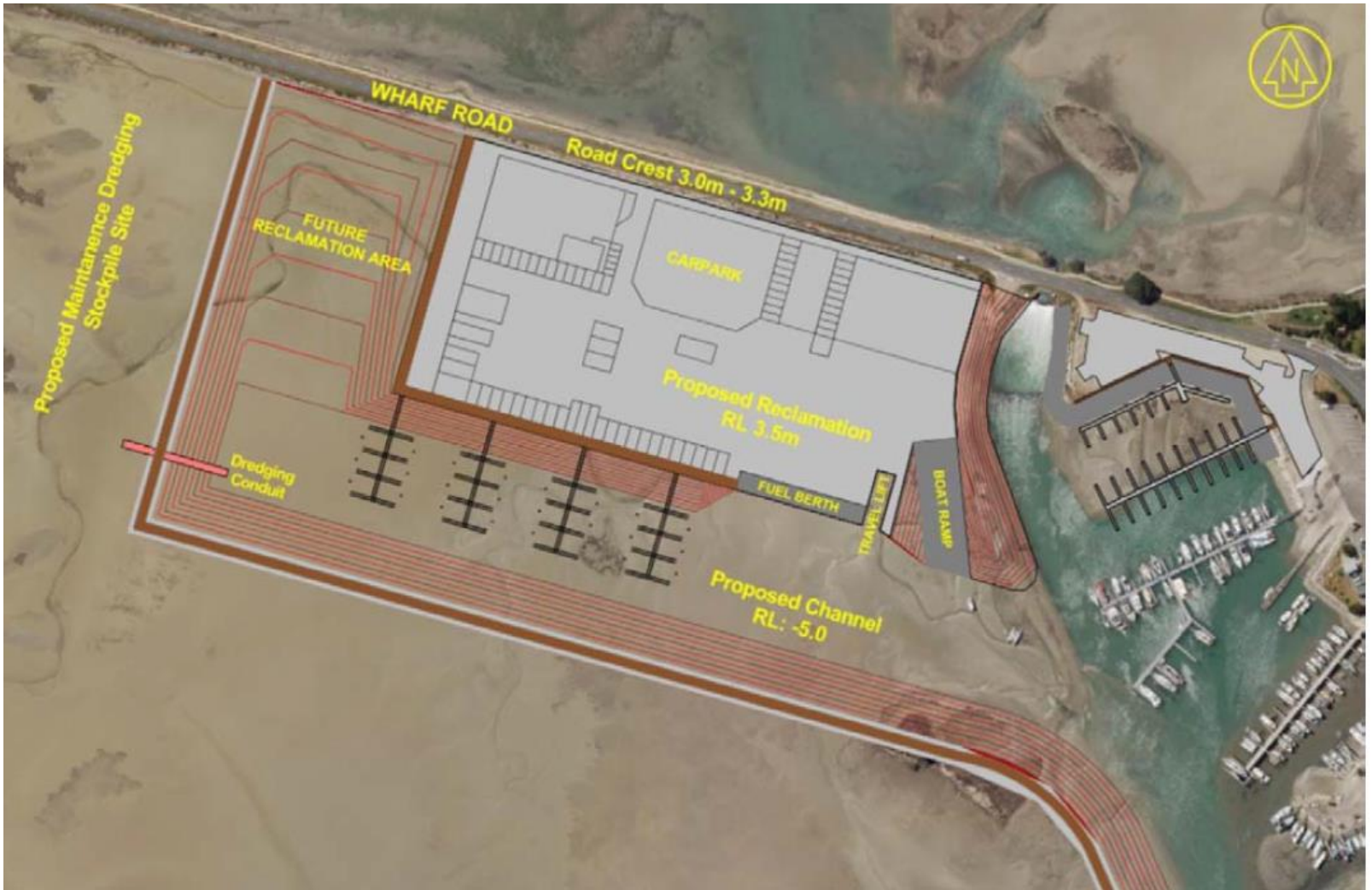
Source: WARDALE marina database and analysis

Notes: Nelson Marina bays are based on potential capacity once fully developed. Nelson hardstand year area and excludes the ~850m of additional accessway to the slipway

Potential Future Supply: Motueka Cruising Club Development

Proposed new reclamation at Motueka Cruising Club could provide future capacity for up to 40 new hardstand spaces. However it is uncertain whether development will proceed in the foreseeable future.

- Peninsula Society hardstand upgrade would provide a further 6 sealed bays at Motueka (Lawless Edge 2019)



Indicative Future Hardstand Yard Size Analysis

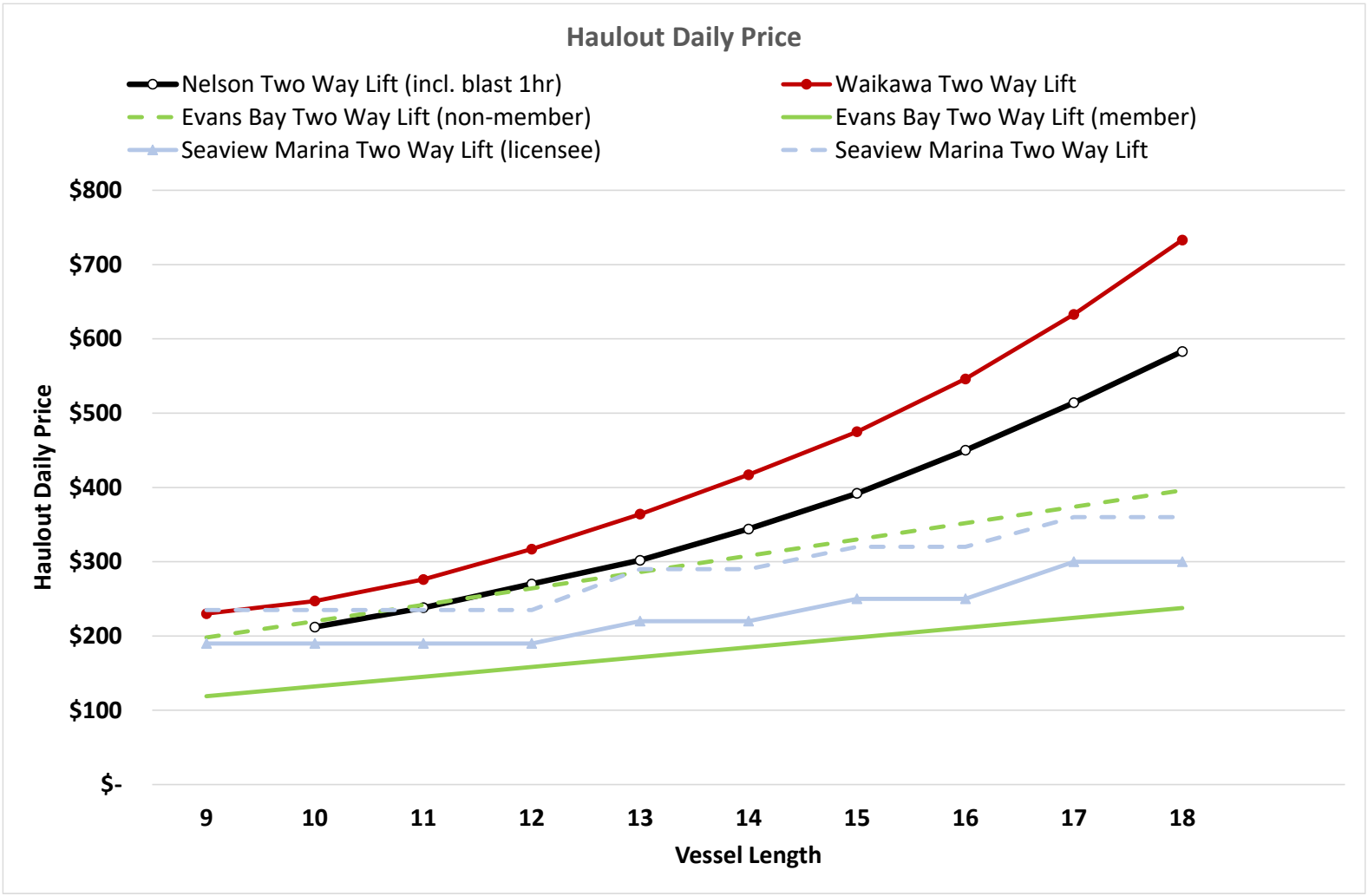
The current hardstand area is 3,050m2 plus ~850m2 access to slipway has capacity for ~14 vessel bays.

			With Indicative Future Demand Growth		
	Current	Current Council Target	NCC Future Target	Lawless Edge Report Target	Marine BioLogic Report Target
Marina berths and piles[1]	591	591	**701**	**701**	**701**
Vessel visitation[2]	100	100	100	100	100
Total hardstand demand	691	691	801	801	801
Berth stays at hardstand yard per year[3]	0.43	1.00	1.15	1.29	1.63
Hardstand yard annual vessel demand[4]	295	691	806	906	1,146
Average days per hardstand stay[5]	10.1	10.1	10.1	10.1	10.1
Total vessel days	2,965	6,945	8,100	9,105	11,515
Number of days per year	365	365	365	365	365
Average yard vessels per day	8	19	22	25	32
Implied average capacity utilisation factor[6]	58%	86%	74%	62%	53%
Number of hardstand bays[7]	**14**	**22**	**30**	**40**	**60**
Average land area m2 per bay (incl. circulation)[8]	217	247	251	283	258
Implied Hardstand land area requirement (m2)	**3,900**	**4,592**	**5,439**	**7,985**	**11,978**
Hardstand Bays as % of Marina berths & piles[9]	**2%**	**4%**	**4%**	**6%**	**9%**

1. Nelson Marina 591 berths and piles currently. Indicative future berth demand of 701 based on likely waitlist and Nelson Council forecast population growth
2. Lawless Edge report estimate of annual visitors is 100
3. NCC current target of 22 berths in Hardstand business case, assumes each vessel in marina stays at hardstand once each year. This is a significant increase on the regularity of use vs current.
4. Current annual vessel demand of 295 vessels is based on 2019 actual hardstand yard data. Total vessel lifts in 2019 was 428 (73% of berths). Data for 2020 not used due to disruptions from COVID and hardstand development.
5. Implied based on 2019 actual data and assumed to remain constant.
6. Current average capacity calculation of 58% implied from 2019 data and is weighted towards summer, where peak overnight yard utilisation is 15 vessels. Higher implied average future capacity utilisation factor would require spreading demand more evenly through year.
7. Current hardstand compound capacity is 14 bays assuming efficient layout. Nelson Council has concept plans to expand the current footprint to provide 22 berths.
8. Includes 850m2 travel lift accessway outside compound and indicative assumptions regarding future increases required for the assume increases in number of hardstand bays. These estimates require refinement to align with concept plan layouts for larger hardstand facilities.
9. Calculated as Marina berths and piles (row 1) divided by Number of hardstand bays (row 11)

Regional Haulout Price Benchmarking

Nelson Marina's haulout prices are below Waikawa, but are generally above the other main regional facilities (particularly for 14m+ vessels)

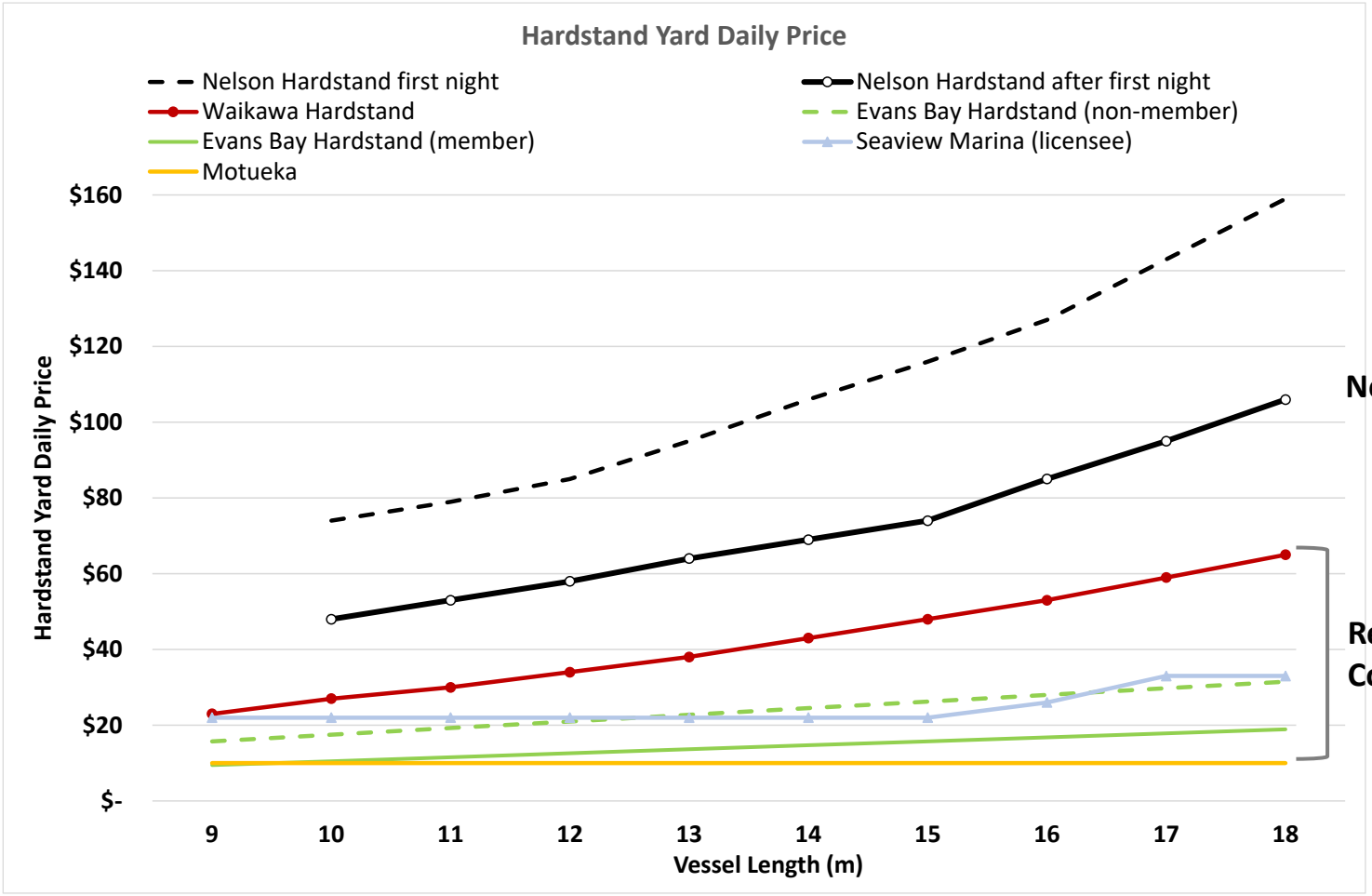


Source: WARDALE marina database.

Regional Hardstand Yard Price Benchmarking

Nelson Marina's hardstand yard prices by berth length are 54% – 78% higher than Waikawa and even further above other regional hardstands. First night pricing at Nelson is 140% – 174% above Waikawa

- This above market pricing is likely supressing observed demand at Nelson hardstand below natural levels
- Anecdotal evidence that about 10% of Nelson vessels are being serviced at Waikawa and many using Motueka

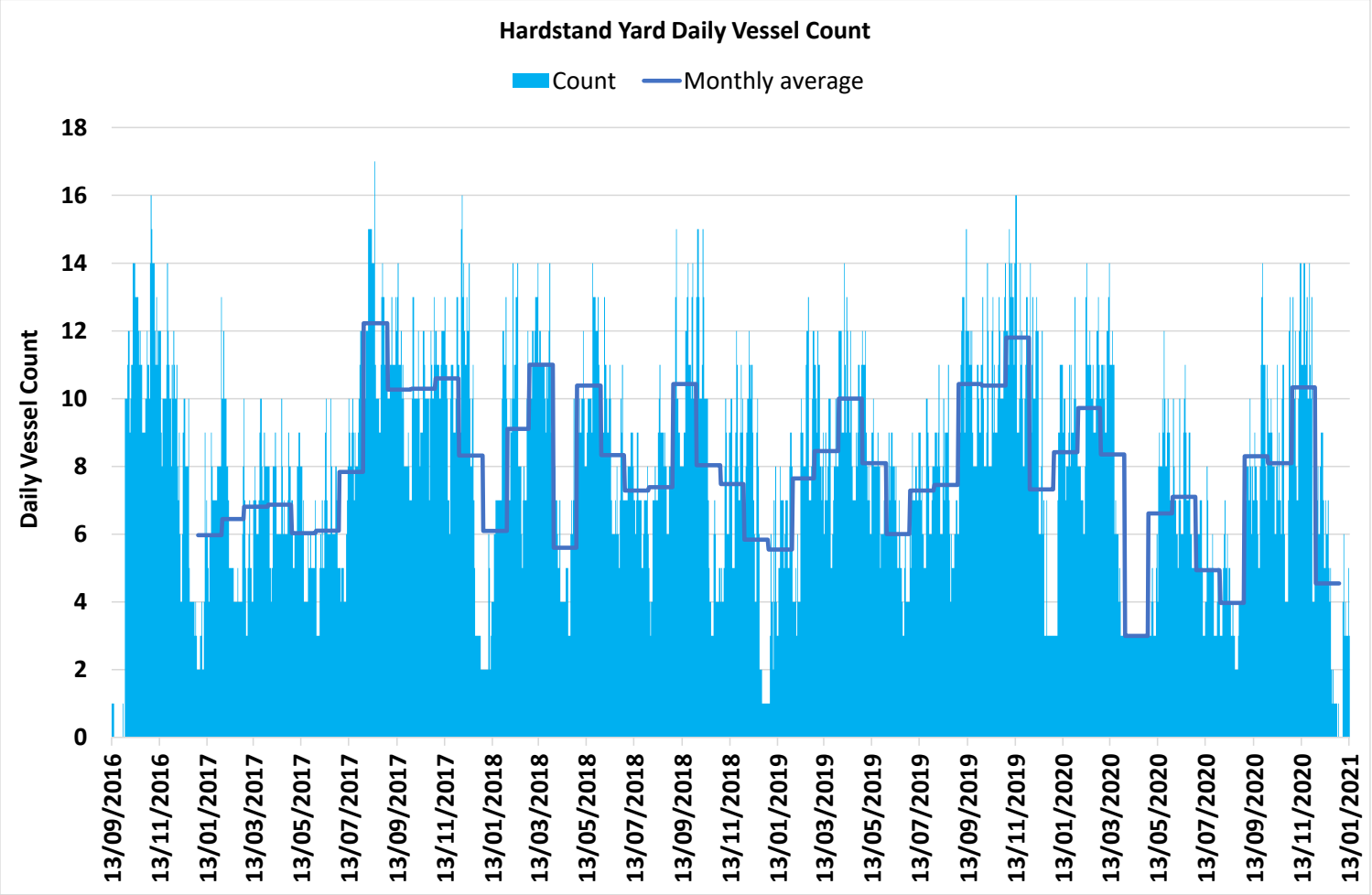


Source: WARDALE marina database.

Hardstand Yard Daily Vessel Count

The Nelson Marina hardstand yard is hitting its yard capacity constraint (~14 bays) on many occasions indicating insufficient supply for peak demand. Significant seasonality in demand provides opportunity to incentivise off peak use.

- Hardstand performance in 2020 was adversely impacted by COVID lockdown

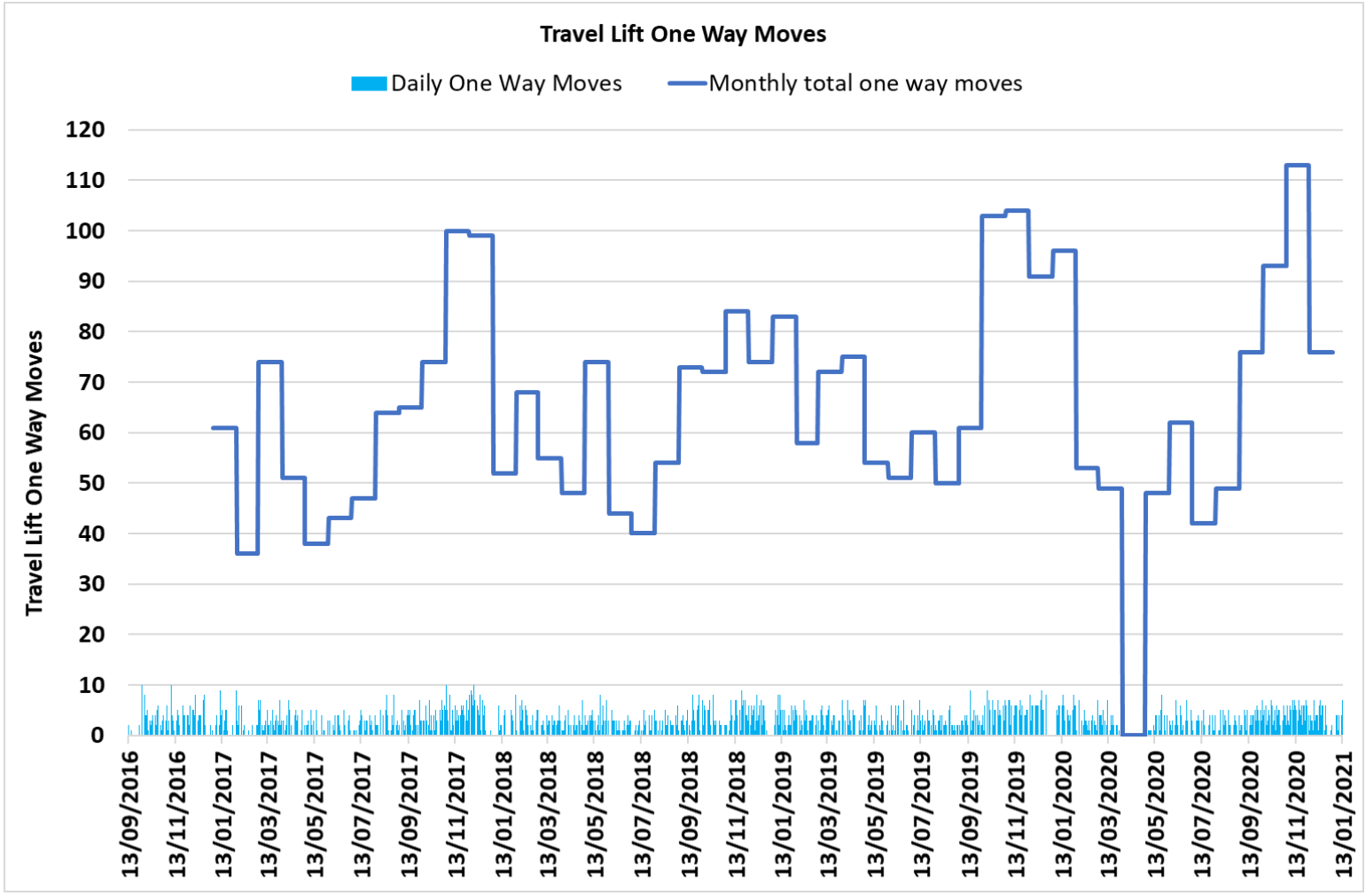


Source: Nelson marina data. WARDALE analysis.

Travel Lift Movements Analysis

Travel Lift has peak daily one way moves of ~10 and peak monthly one way moves of ~100 - 110

- Results assume that a lift and return in a single day is counted as one travel lift "job". A one way lift in a day is counted as one "job".



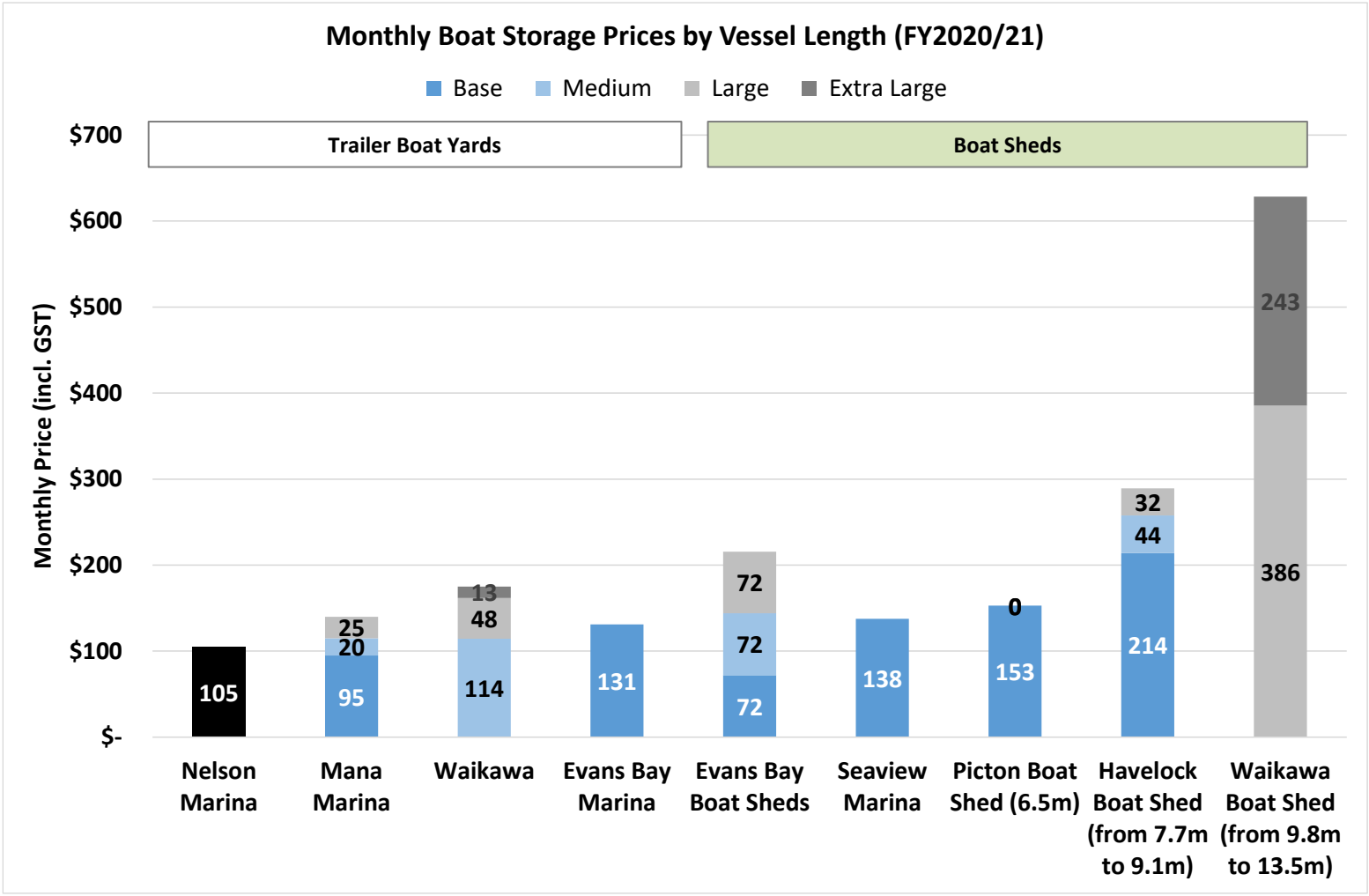
Source: Nelson marina data. WARDALE analysis.

WARDALE
marine industry consulting

4.4 Trailer Boat Storage Yard & Boat Sheds

Trailer Boat Storage Price Benchmarking

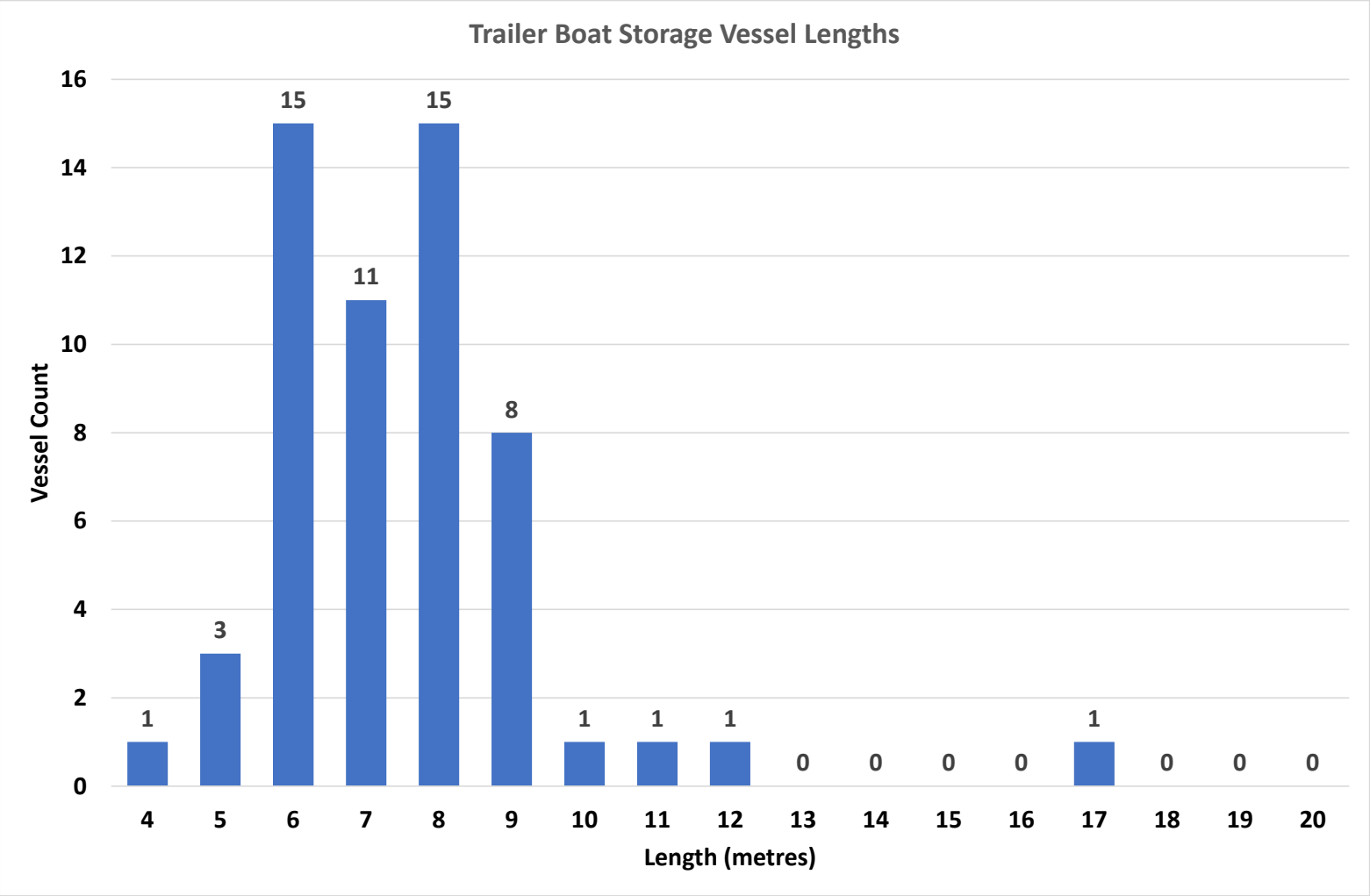
Nelson Marina's pricing for trailer boat storage yard is below regional marinas and does not vary by size



Source: WARDALE marina database.

Nelson Marina: Trailer Boat Storage Vessel Lengths

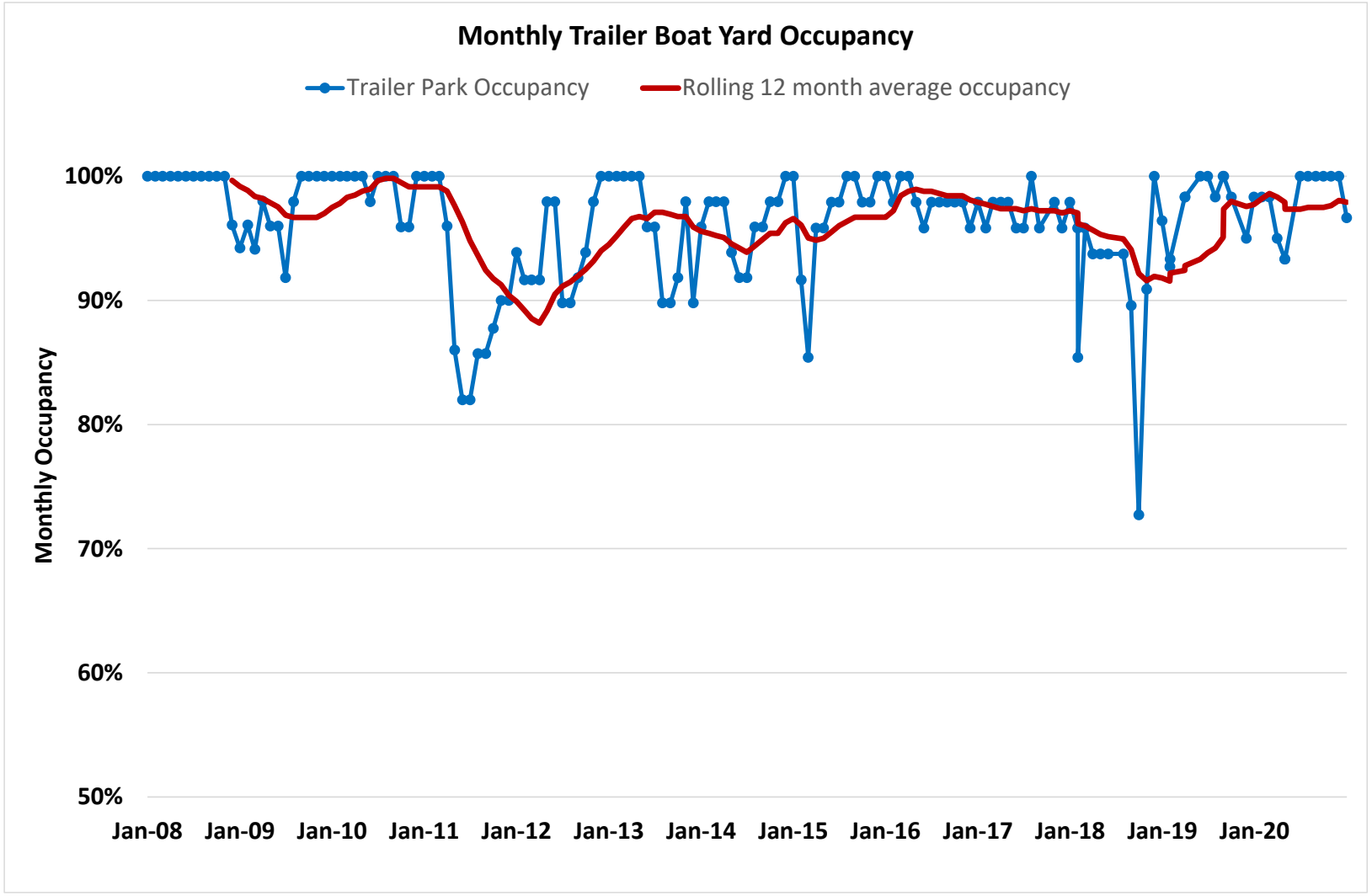
Most of the boats currently stored in the Nelson Marina trailer park are 6m to 9m length



Source: Nelson marina data. Vessel length is missing from the data for 5 customers.

Nelson Marina: Trailer Boat Storage Occupancy

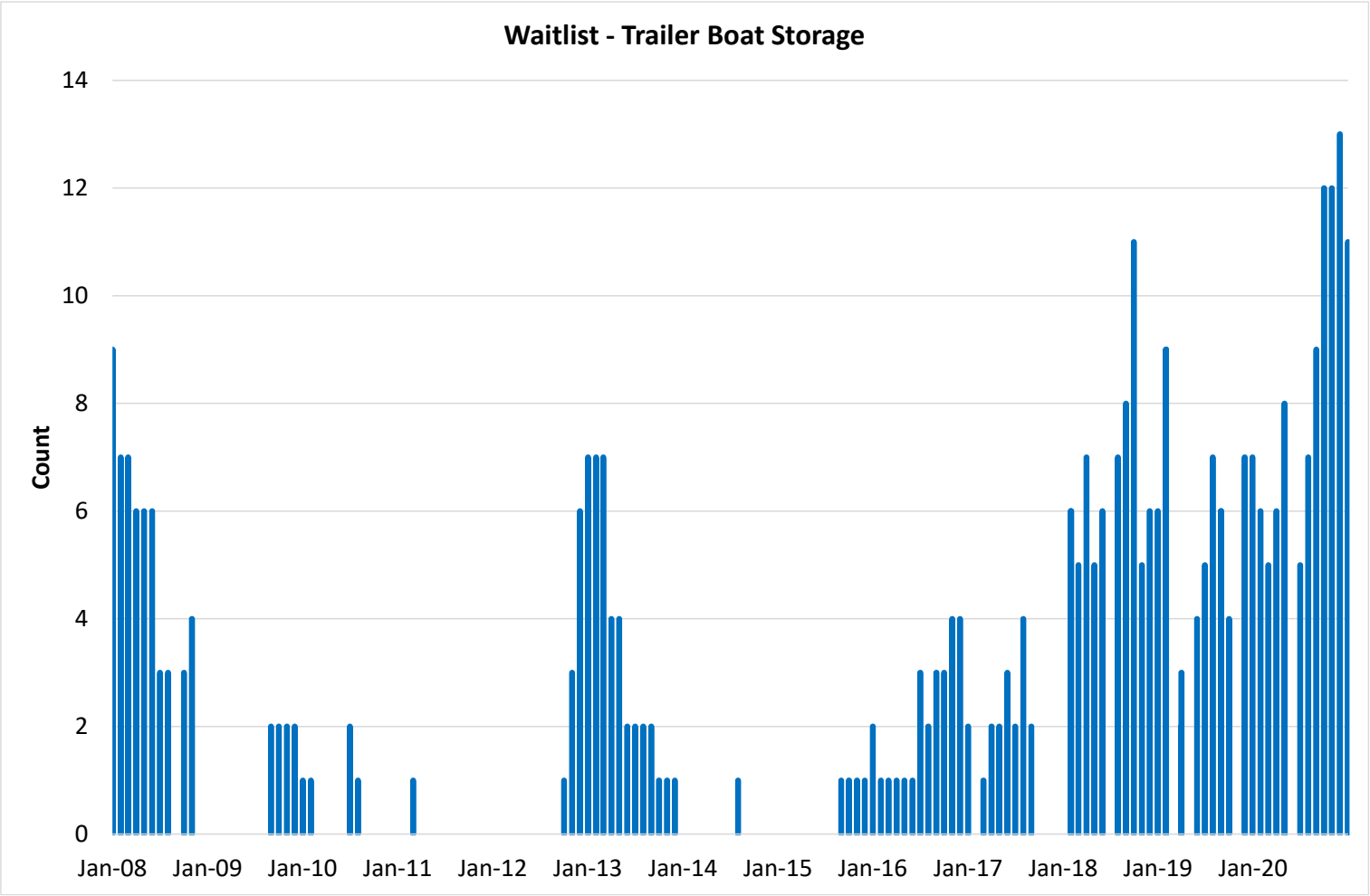
Occupancy exhibits some volatility but on a 12 month rolling basis consistently exceeds 90%



Source: Nelson Marina data January 2008 to December 2020. WARDALE analysis.

Nelson Marina: Trailer Boat Storage Waitlist

Nelson Marina's Council trailer boat storage compound has 60 trailer boat storage parks and is now at full capacity with a growing waitlist

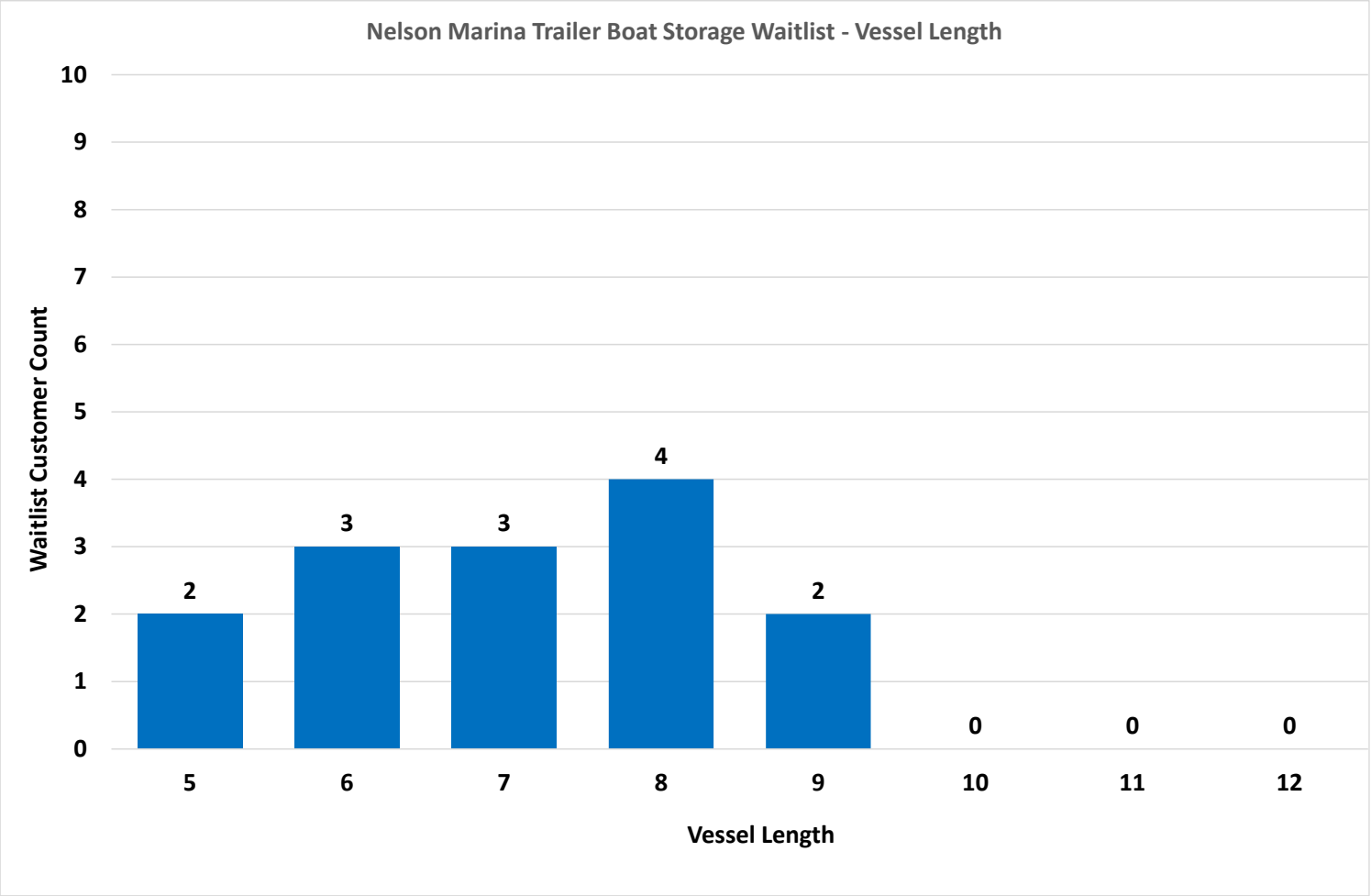


Source: Nelson Marina data January 2008 to December 2020.

Nelson Marina: Trailer Boat Storage Waitlist – Vessel Length

Nelson Marina currently has 14 customers waiting for trailer boat storage, with vessels in the 5m – 9m range

- All are recent waitlist registrations (within last 6 months) so are likely to still have current demand



Source: Nelson Marina waitlist as at 18 February 2021, WARDALE analysis

Supply & Demand for Trailer Boat Storage

The region has marina trailer boat storage supply of over 900 spaces

- Nelson Marina has a Council owned compound with 60 spaces plus a private company with spaces for ~20 vessels
- Generally good levels of occupancy across the region
- Nelson Marina and Mana Marina both have customer waitlists (data was not available for all facilities)
- Strong expected growth in power boats combined with intensification of urban areas should support continuing increases in demand for trailer boat storage

Region	Nelson	Tasman		Marlborough			Wellington					
Facility	Nelson Marina	Port Motueka	Port Tarakohe	Havelock Marina	Picton Marina	Waikawa Marina	Seaview Marina	Evans Bay Marina	Mana Marina	Chaffers Marina	Clyde Quay Marina	Total
Trailer Boat Storage Spaces	80	10	37	Combined Total > 400			248	90	50	1	-	916
Waitlist (if data available)	14	n/a	n/a	n/a	n/a	n/a	n/a	n/a	~20	n/a	n/a	n/a

Demand for Boat Storage Sheds

Boat storage sheds are experiencing good demand across the region, with facilities at capacity

- Port Marlborough reported boat shed occupancy of 99.3% across its three facilities in 2020
- Evans Bay has full occupancy of its boat sheds and due to excess demand closed its waitlist for large boat sheds until further notice (19 customers were already waiting as at 2018)
- Clyde Quay boat sheds are fully occupied with a waitlist of 3. However the sheds are not industry standard since small and do not align with trend to larger vessels, so the current demand is more about storage

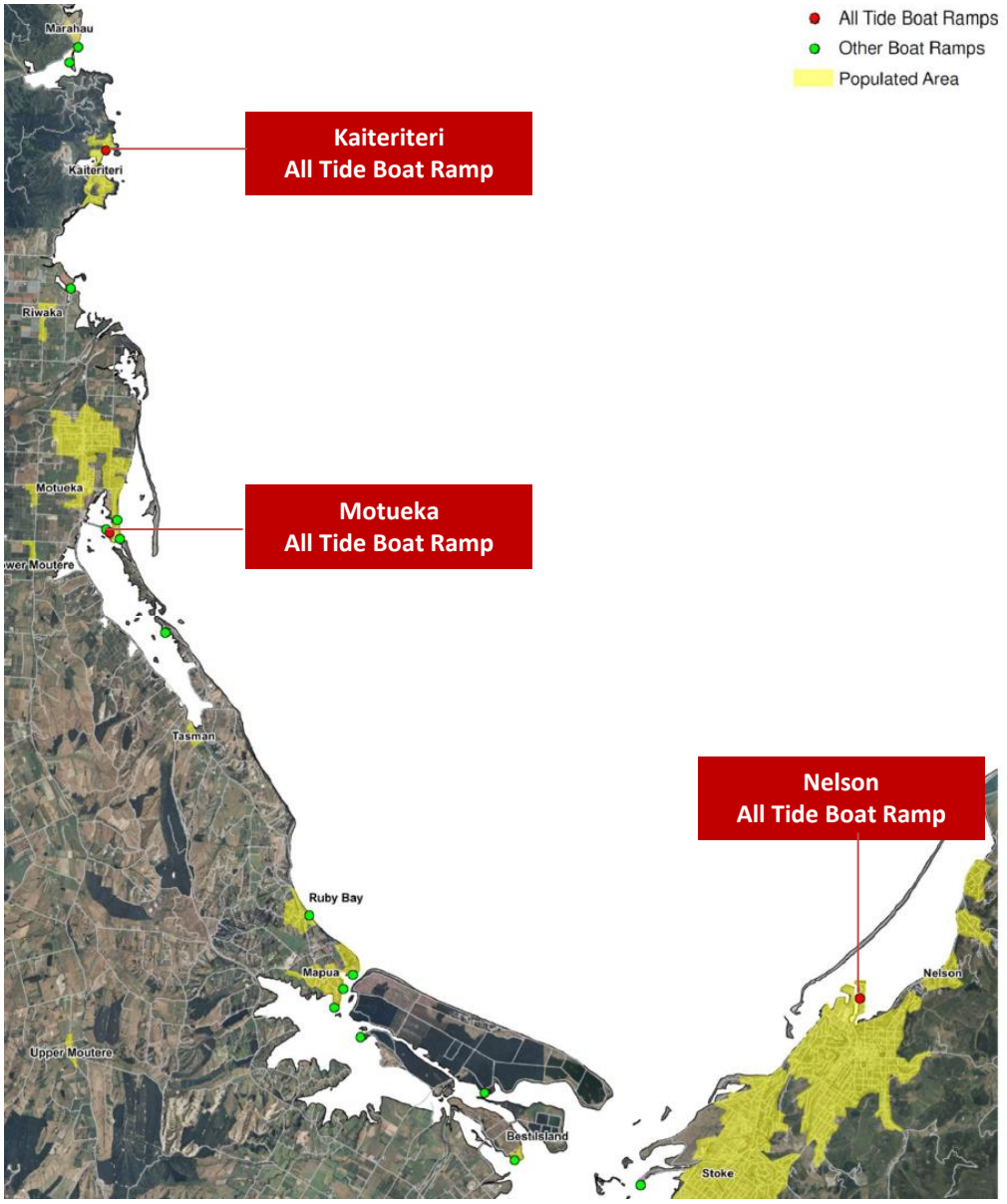
WARDALE
marine industry consulting

4.5 Boat Ramp

Nelson/Tasman: Boat Ramp Supply

The Nelson/Tasman region only has 3 major all tide boat ramps

- Nelson Marina's 3 lane boat ramp has a key role servicing the main population base in the region
- Port Motueka (2x single lane) and Kaiteriteri (narrow 3 lane) are the other two all tide boat ramps, which are both privately owned and operated
- Tasman District administers 9 other concrete ramps
- There are another 58+ other boat access locations in the Tasman District, mainly suitable for dinghy and small boat only e.g. unformed, beach access, lack of toilet facilities etc

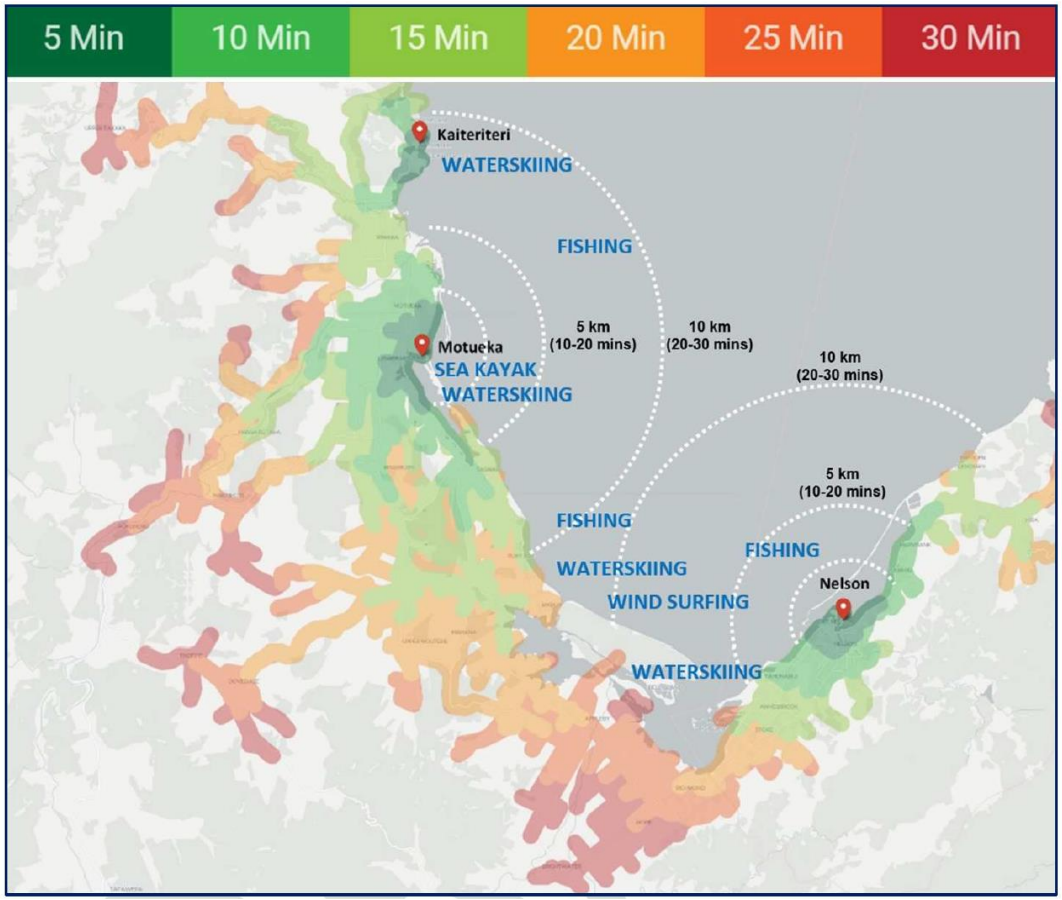


Source: Tasman District Council (draft)

Existing Boat Ramps: Travel Times

The Nelson marina boat ramp is well located with short travel times for Nelson residents to sheltered all weather and all tide water access.

- Tasman's growing Richmond area has a significant travel time to the existing three all tide ramps
- Survey results indicate that boaties fishing within Tasman Bay tend to launch from their closest suitable ramp
- If heading further afield / other water activities, users tend to drive further and launch closer to the destination

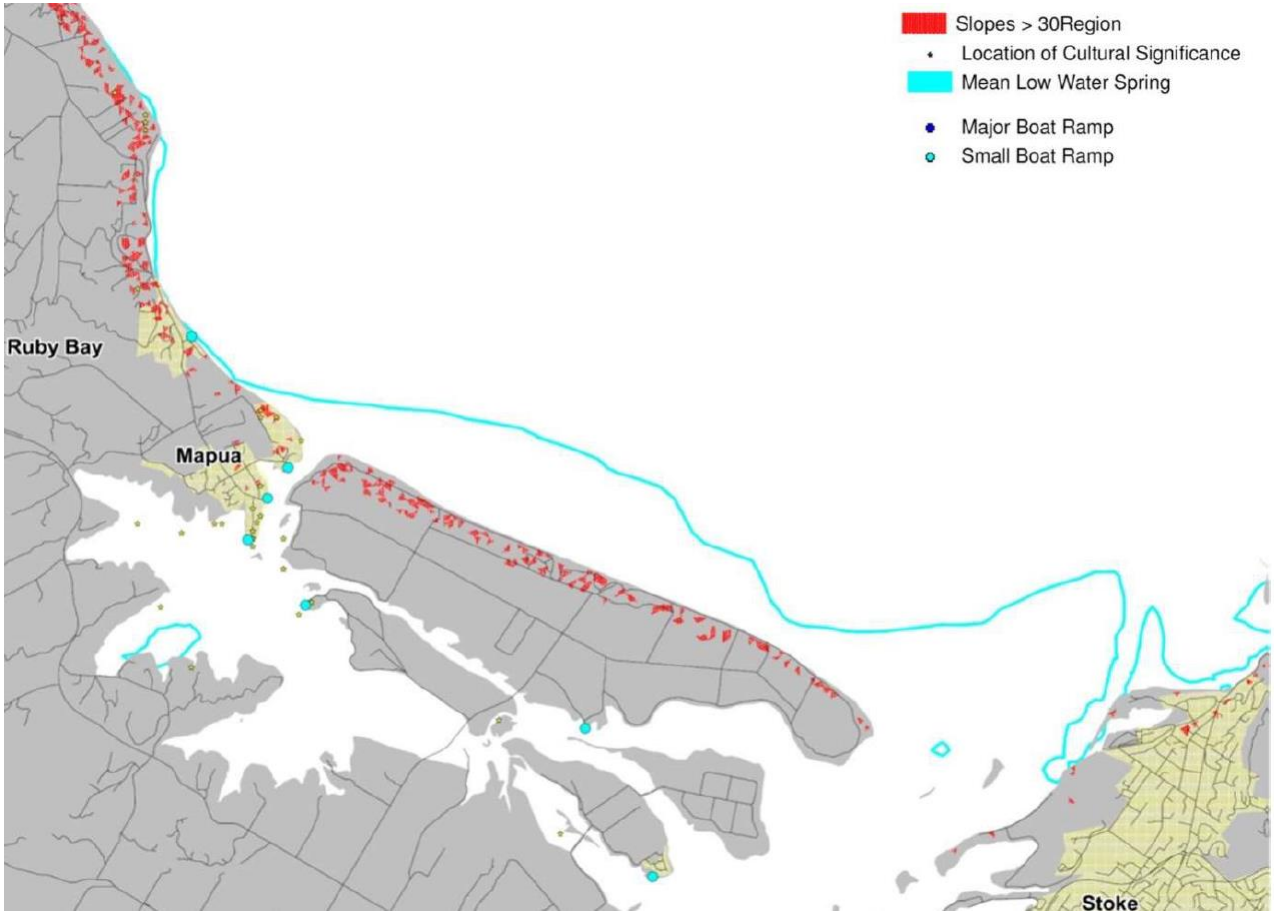


Source: Tasman District Council (draft)

Boat Ramp Supply: Constraints

Lack of alternative new locations for new boat ramps due to geographical constraints including shallow access, bars, narrow channels, road access, steep slopes/erosion and areas of cultural significance.

- Tasman District Council has mapped these constraints in detail (example below)
- WARDALE understands that Nelson City Council does not currently have any recent plans identifying a major new boat ramp location

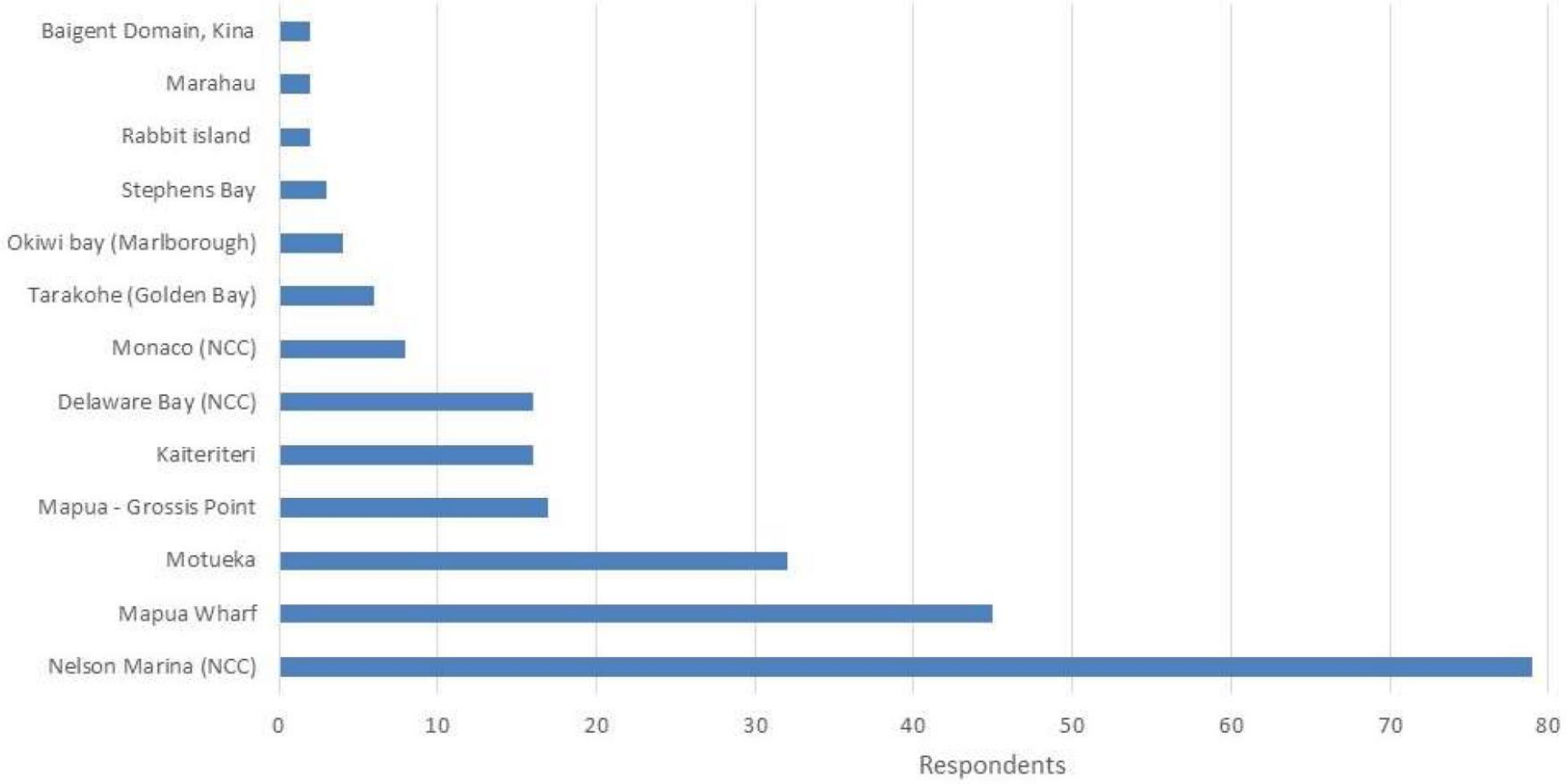


Source: Tasman District Council (draft)

Boat Ramp Demand: Tasman Council Survey – Preferred Ramp

Tasman District Council conducted a survey in April 2020 with 250 respondents with 78% perceiving there to be a shortage of boat ramp facilities in the Tasman Bay area

- Nelson Marina was the preferred boat ramp by a large margin



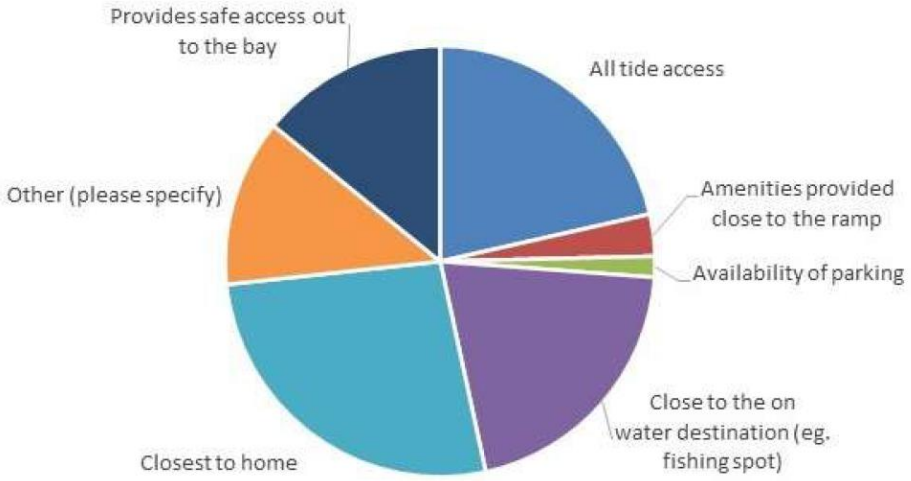
Source: Tasman District Council

Boat Ramp Demand: Tasman Council Survey (continued)

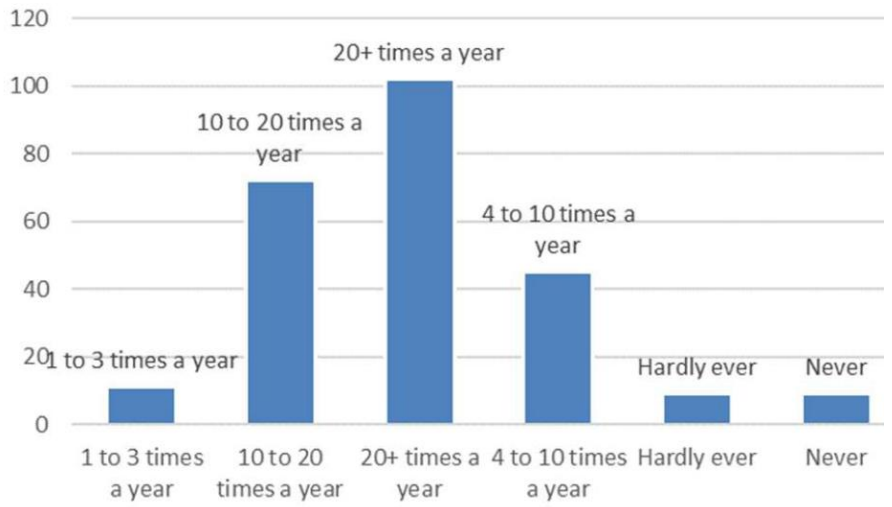
Trend towards older, less experienced boating users is likely to increase demand for convenient safe boat ramp access

- Boat ramp users indicated key factors when choosing a boat ramp to launch include i) Location, ii) All tide access and iii) Safe access out to the bay
- 63% of respondents are willing to travel a little further to access the right facility
- 54% are happy to pay a small fee to reduce congestion
- Availability of parking and amenities close to ramp was of much lower importance
- Non-motorised users feel their needs could be cost effectively met but are not being given priority
- Dedicated facilities for different sized boats and commercial users would reduce conflicting uses & frustration

Why do you choose a certain boat ramp?



How often do you access Tasman Bay via a boat ramp

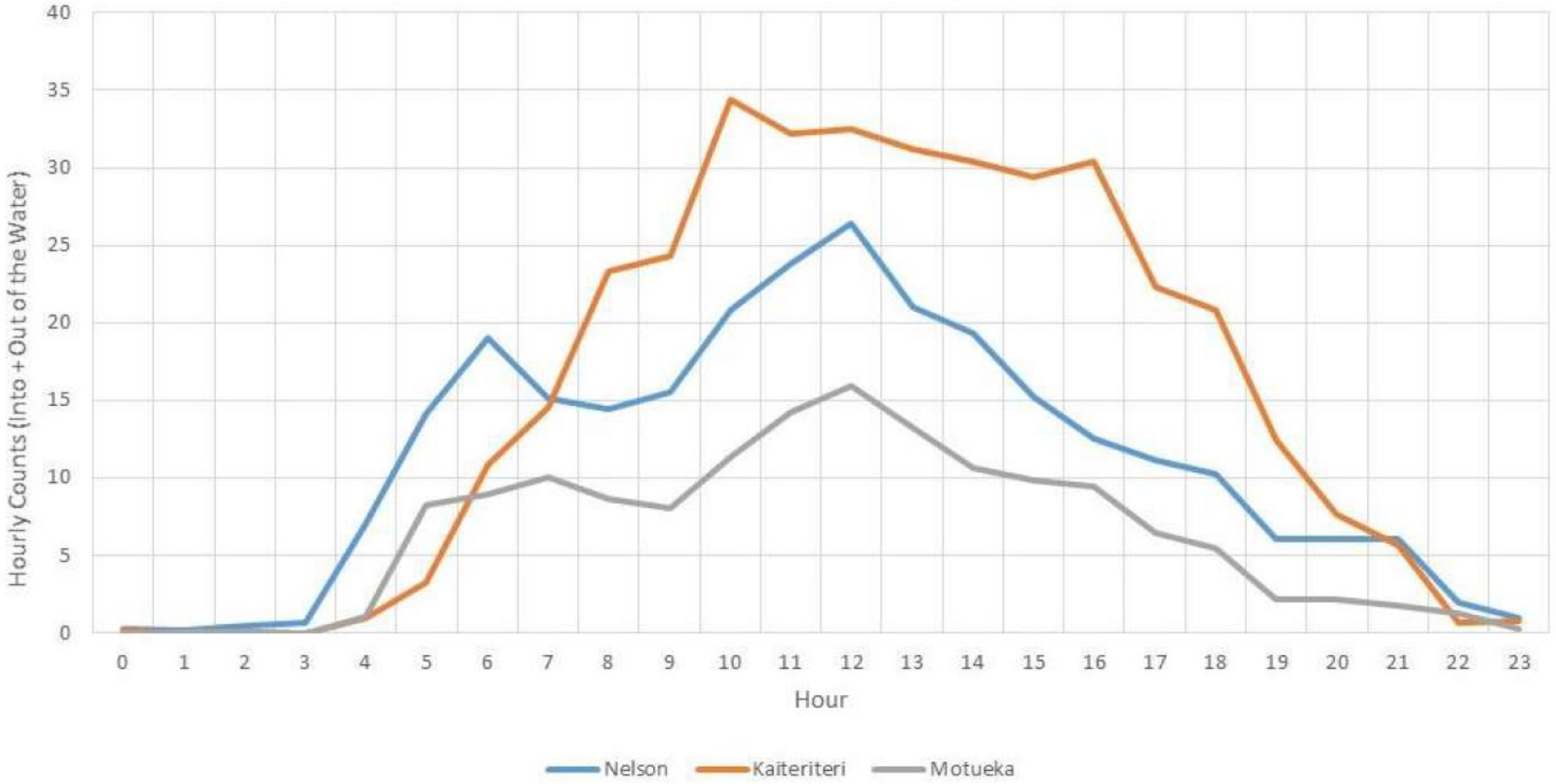


Source: Tasman District Council

Boat Ramps: Launching/Retrieval Demand by Time of Day

Traffic counter data for January 2020 are shown for the three all tide marinas; Nelson, Kaiteriteri and Motueka

- Indicative average hourly counts of boats (into + out of the water) are shown below
- Results shows that demand commences very early in the morning at Nelson continues over most of the day
- Kaiteriteri was the busiest boat ramp during daylight hours



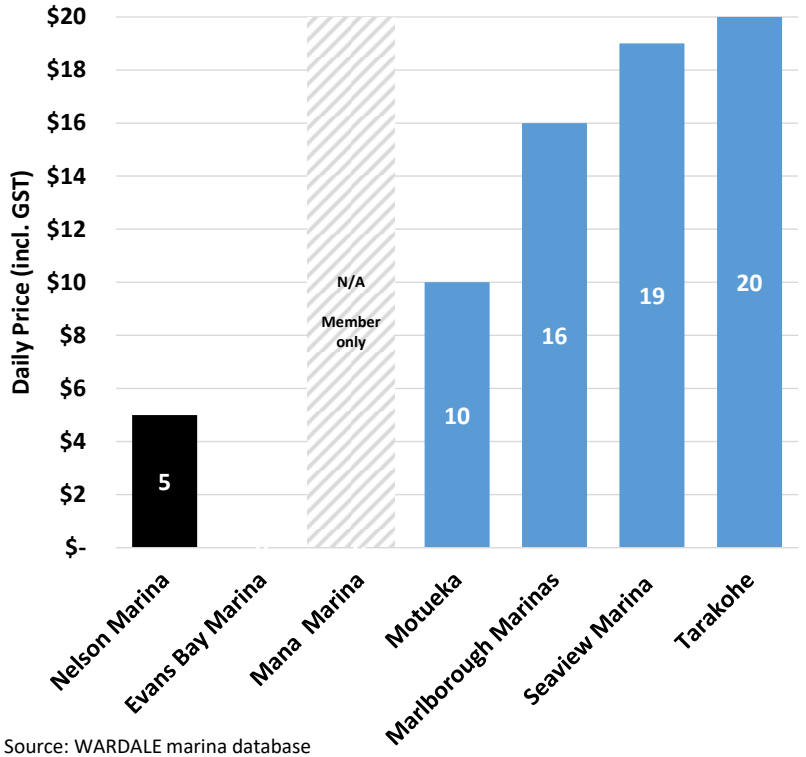
Source: Tasman District Council (draft)

Boat Ramp: Price Benchmarking

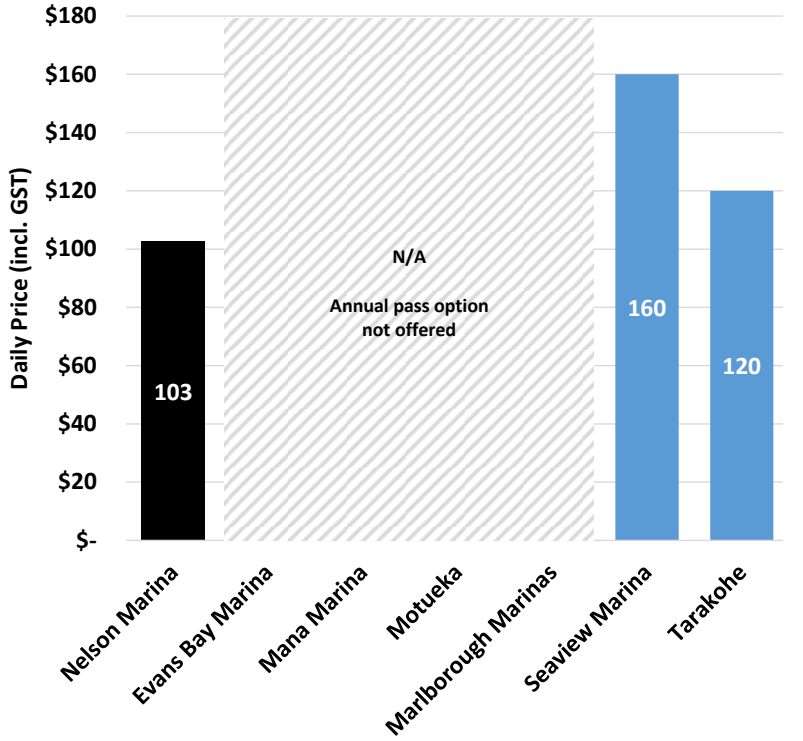
Nelson Marina's boat ramp fee of $5 per day is below regional peers and payment by users is not being enforced. Nelson's low fee will be modestly supporting observed demand levels and congestion.

- Evan's Bay Marina currently has no boat ramp launching fee
- Mana Cruising Club boat ramp is for members only with barrier arm access
- Nelson, Seaview and Tarakohe also offer users an annual pass option

Daily Boat Ramp Launch Fee



Boat Ramp Annual Pass Fee



Source: WARDALE marina database

Notes:

1. Marlborough Marinas fee includes parking, daily fee reduces to $10 for subsequent days
2. Seaview Marina fee is $9.50 per barrier arm movement (x2)
3. Port Tarakohe fee is $10.00 per barrier arm movement (x2)

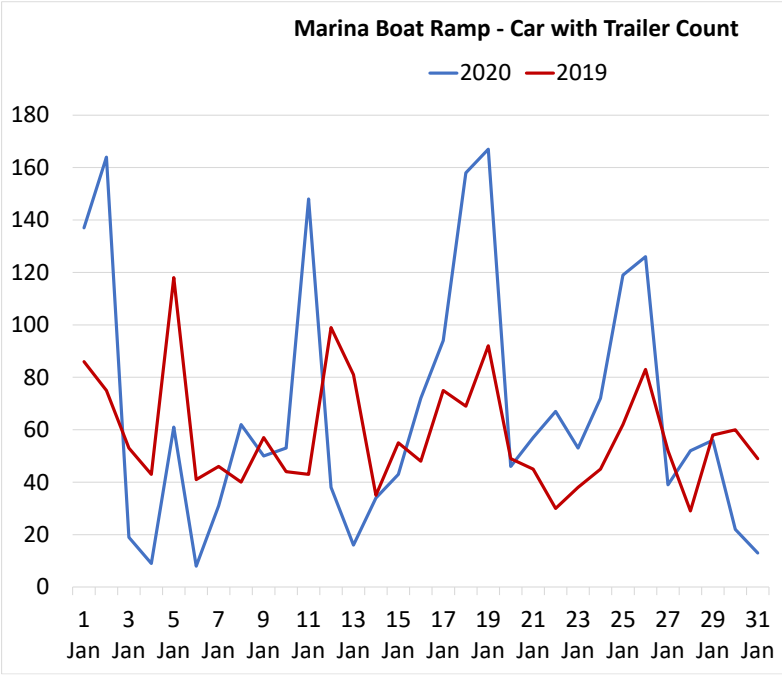
Nelson Marina Boat Ramp – Current Trailer Boat Demand

Monthly trailer boat launching + retrieval count was 2,094 in January 2020, with max peak day count of 167.

- A traffic counter has been at the marina boat ramp during January for the last 3 years
- Counter can differentiate between car with trailer movements and car only movements.
- One way circulation of boat ramp traffic means the car with trailer count typically occurs as follows:
  - Launch boat and then park trailer = 1 count
  - Retrieve boat and then leave ramp = 1 count
- The count excludes non-trailered vessels that are carried down to the boat ramp by users
- Graph shows daily usage is highly variable – driven by weather and day of week / holidays
- The January 2020 count of 2094 was slightly higher +2% than January 2019 count of 1814
  - Due to higher average peak day (weekend and public holiday) usage +46%
  - Offset by non-peak (weekday) usage lower by 7%

Nelson Marina Boat Ramp – Car with Trailer Movements

	Jan-19	Jan-20	% Change	Jan-21	% Change
Total Month Count	1814	2094	15%	TBC	TBC
All Days					
Median	52	53	2%	TBC	TBC
Peak Days					
Max day	118	167	42%	TBC	TBC
Average - Weekends/Public Hols	77	113	46%	TBC	TBC
Non-Peak					
Average - Weekdays	49	46	-7%	TBC	TBC



Source: Tasman District Council, WARDALE analysis
Note: January 2021 data not yet available – will be added once received

Nelson Marina Boat Ramp – Ticket Machine and Annual Passes

Annual Passes: Annual boat ramp pass revenue for FY2020/21 budgeted by NCC to be $25,800 plus GST. Based on $102.70 incl. GST annual pass price, this implies approx. 290 regular users.

Casual users: Boat Ramp ticket machine data shows summer month (Dec – Jan) paying casual users of over 1,000 per month (summer daily average approx. 30 – 35)

- Ticket machines installed at the boat ramp show seasonality of demand peaking in summer
- Ticket price for casual launching at boat ramp is $5

Boat Ramp Ticket Machine Data

	Count		Paid
Jul-20	141	$	721
Aug-20	205	$	1,010
Sep-20	256	$	1,243
Oct-20	441	$	2,154
Nov-20	638	$	3,142
Dec-20	1,092	$	5,436
Jan-21	1,031	$	5,094

Non Payment: Nelmac historically checked compliance with parked trailer fee payment and found significant non-compliance (up to ~1/3 not paying) due to non-enforcement.

- Feedback from users confirms that some power boats not paying
- Non-powered vessels using the ramp assume they are not required to pay
- Once WARDALE receives the January 2021 trailer count data we can use the traffic revenue to calculate the indicative current % not paying

Nelson Marina: Boat Ramp Trailer Parking Supply & Demand

Supply of 80 car with trailer parks at the boat ramp. January 2020 boat ramp traffic counter data indicates a max peak day count of 167 (which implies current peak demand for ~83 unique cars with trailer parks) plus provision of parking required for other boat ramp and Sea Sports users

- Previously there were only 48 car with trailer parks (prior to relocation of long term trailer boat storage area) and that was causing significant shortfalls at peak
- Current supply of 80 car with trailer parks are currently at the boat ramp
- If users of the boat ramp area were parking correctly, the count data suggests sufficient car with trailer parking capacity for current peak levels and a surplus on normal weekdays.
- However, car with trailer parking congestion at the boat ramp during peak times is exacerbated by factors including:
  - Lack of marina car only parking for Piers A and B
  - Limited car only parking for Sea Sports users
  - Motueka Nets direct access to the area and parking usage
  - Lack of enforcement of single cars parked in car with trailer parks
  - Non compliance with payment by up to ~1/3 of parked boat trailers according to Nelmac
  - Single entry/exit point onto Akersten Street

Boat Ramp Trailer Parking Overflow onto Akersten Street

Recent photos show that boat ramp trailer boat parking does have significant overflow onto unmarked spaces along Akersten Street during peak times

- Nearby street area has indicative space for around 20 cars with trailers

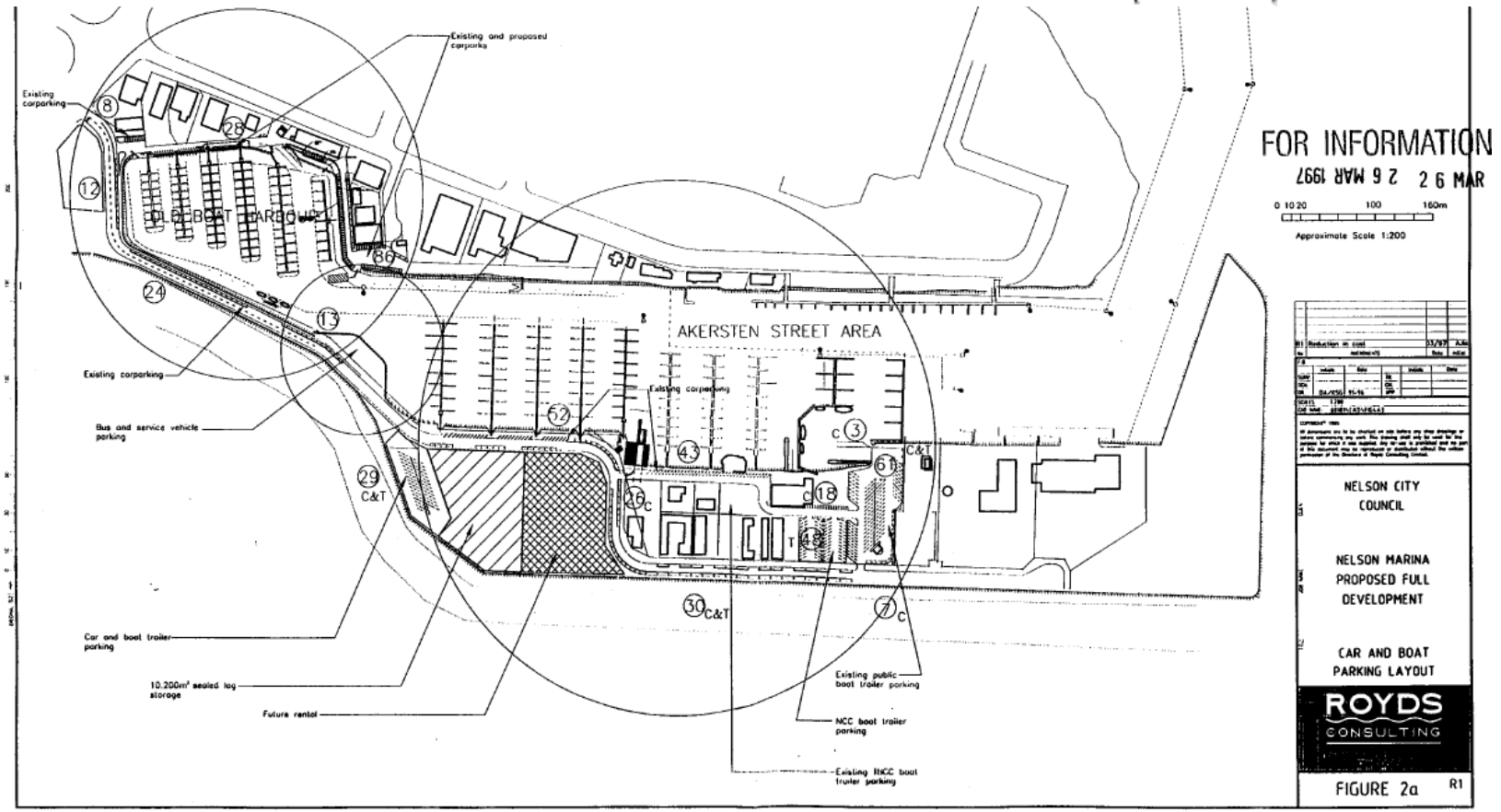
WARDALE
marine industry consulting

4.6 Car Parking

Resource Consent Parking Requirements

The 1997 marina resource consent requires a ratio of car parks to marina berths of 0.75 : 1

Position	Marina Berths	Carparks Required (0.75 x Marina Berths)	Carparks Provided		Combined Car and Boat Trailer Parks		Trailer Parks	Total Parks
Old Boat Harbour	244	183	(28+86+8+12+24)	158				158
Service Area	8	6		13				13
Akersten Street	344	258	(52+43+3+18+7+26)	149	(61+30+29)	120	48	317
Total	596	447		320				488



Marina Car Parking Situation Overview

- The Marinas Standard Guideline AS 3962, recommends a total of 0.7 car parks per marina berth
- Ideally marinas should provide at least 0.5 dedicated marina parks per berth during weekends (and 0.3 dedicated marina parks per berth during weekdays)
- Nelson currently has no dedicated marina berths, no signage and is not enforcing car parking violations within the marina
- Considerable levels of competition for car parks from surrounding businesses and marina uses
- Customer feedback to marina surveys and LTP submissions indicate that marina parking is undersupplied, particularly in the Vickerman street area, resulting in customers having long walks with heavy cargo to vessels
- Situation exacerbated by 41 liveaboards which place higher and more consistent demand on car parking than normal recreational berth users

Location 1 Parking Analysis

Parking in the boat ramp area is insufficient at peak times with the 40 berths on Piers A and B competing for 35 shared car parks with Seasport users, public boat ramp and Motueka Nets (despite the ratio of 0.88)

- Trailer boat users have reported issues with single cars parking in car with trailer parks and no enforcement
- Expansion of car with trailer parking by 31 spaces has assisted
- Overflow parking on both sides of Akersten street with capacity for ~60 cars to park (or equivalent space for ~20 car with trailer parks)
- Layout, signage and pedestrian accessways could be improved

Berths = 40

Marina Carparks = 35

Carparks to Berths Ratio = 0.88 : 1

Car parks exceed consent ratio by 5

Nearby Carparks = 60

Incl. Nearby Carparks Ratio = 2.38 : 1

Car with Trailer = 80

Source: WARDALE analysis

Location 2 Parking Analysis

Parking for Piers C, D & E is insufficient at peak times with the 118 berths competing for 53 shared car parks with Tasman Yacht Club users, local businesses and the hardstand (ratio only 0.45)

Berths = 118

Marina Carparks[1] = 53

Carparks to Berths Ratio = 0.45 : 1

Car parks shortfall vs consent ratio = 36

Nearby Carparks = 32

Incl. Nearby Carparks Ratio = 0.72 : 1

Source: WARDALE analysis
Notes:
1. Includes 1 disabled carpark

Location 3 Parking Analysis

Piers F to J have 167 berths and 113 nearby shared marina car parks including 10 marked on-street (ratio 0.68)

- Marina office has staff car parking demand (up to ~8) and hardstand is also competing for car parks
- Pier F does not have as good proximity to this car parking area

Berths = 167

Marina Carparks[1] = 113

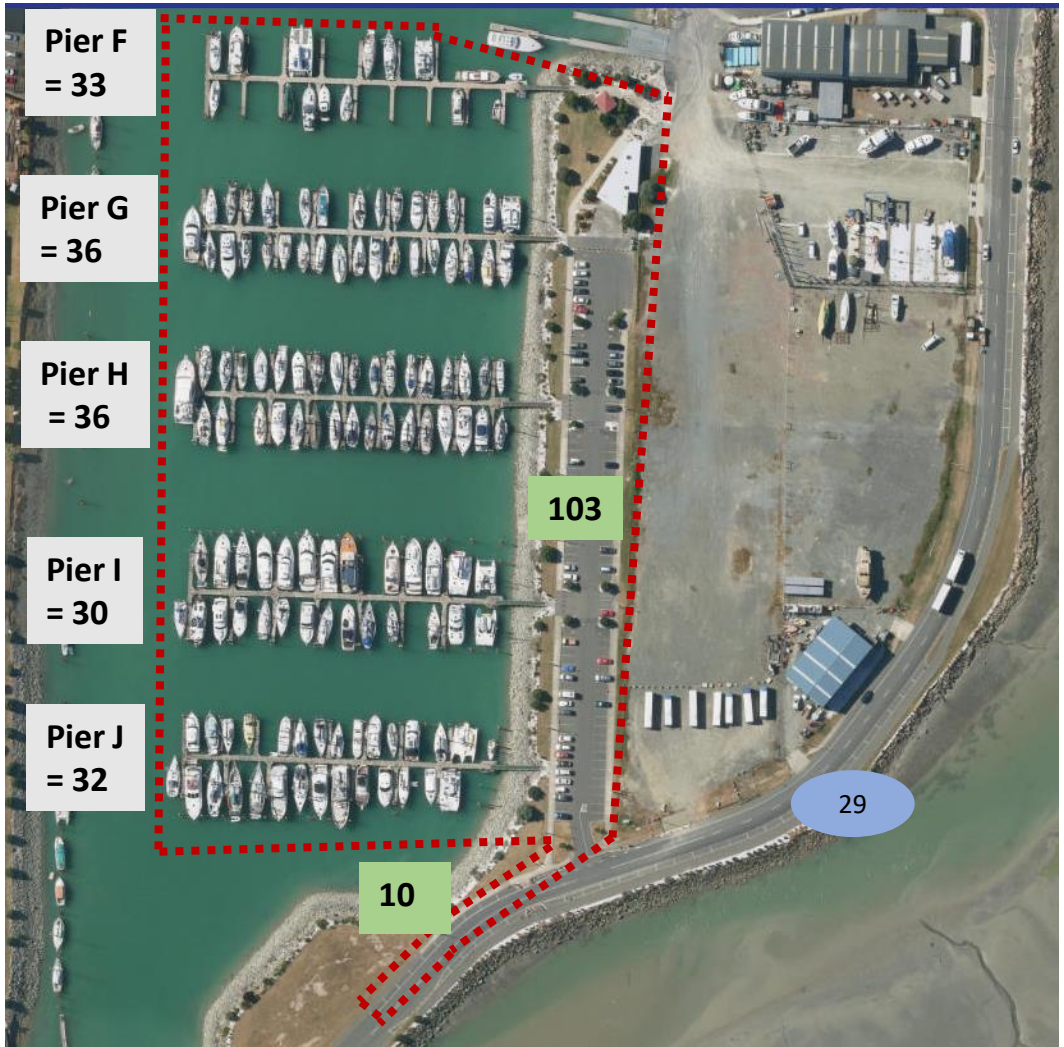
Carparks to Berths Ratio = 0.68 : 1

Car parks shortfall vs consent ratio = 12

+ ~8 marina office parks

Nearby Carparks = 29

Incl. Nearby Carparks Ratio = 0.85 : 1



Source: WARDALE analysis
Notes:
1. Includes 7 disabled carparks

Location 4 Parking Analysis

The 18 berths on Pier K and western pile moorings are well serviced by 73 nearby shared car parks (ratio 1.87)

- Motel business customers and underserviced southern piers are competing for car parks

Berths = 38

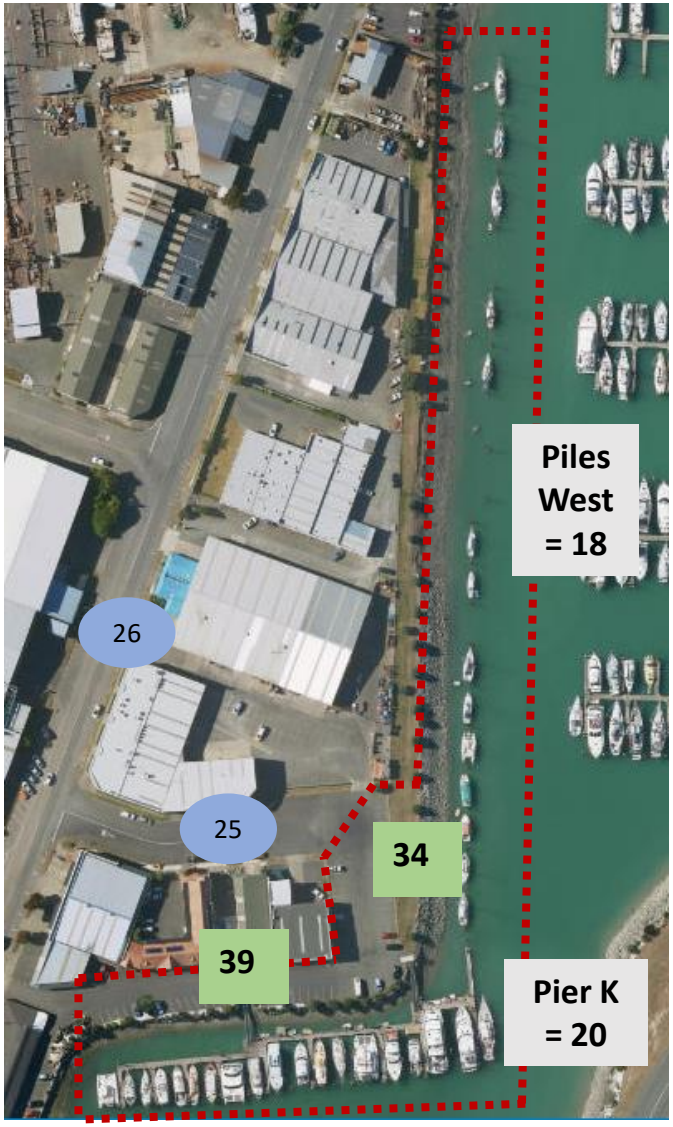
Marina Carparks = 73

Carparks to Berths Ratio = 1.87 : 1

Car parks exceed consent ratio by 44

Nearby Carparks = 51

Incl. Nearby Carparks Ratio = 3.18 : 1



Source: WARDALE analysis

Location 5 Parking Analysis

Poor car parking availability for Piers L to P with 209 berths and only 66 shared car parks (ratio only 0.32)

- A stevedoring business is frequently utilising many of the southernmost car parks (10+10)
- Combining the results for Location 4 and 5 yields a car park to berth ratio which is still low at 0.52

Berths = 209

Marina Carparks = 66

Carparks to Berths Ratio = 0.32 : 1

Car parks shortfall vs consent ratio = 91

Nearby Carparks = 38

Incl. Nearby Carparks Ratio = 0.50 : 1

Source: WARDALE analysis

Location 6 Parking Analysis

The 15 eastern pile moorings are serviced by a significant amount of Akersten Street car parking (ratio 2.13)

Berths = 15

Marina Carparks = 32

Carparks to Berths Ratio = 2.13 : 1

Car parks exceed consent ratio by 21

Nearby Carparks = 32

Incl. Nearby Carparks Ratio = 4.27 : 1

Source: WARDALE analysis

Carparking Supply and Demand Summary

Overall Nelson is below its consented car parks, with a ratio of ~0.63 standard marina parks

- Shortfall to reach 0.75 consent equates to ~133 parks. Gap filled by nearby street parking and car with trailer parks
- Piers with significant parking shortages due to location and competing uses are:
  - Piers C to E (Sea Sports, TBCC, hardstand) F (no parking in front, marina office),
  - Piers L to P (few parks, commercial tenants)
  - To a lesser extent, Piers A and B (boat ramp), and G (marina office and hardstand)

Location Group Number	Pier	Berths	Location Group Berth Total	Marina Carparks Total	Ratio Carparking/ Berths	Extra Parks for 0.75 Consent Ratio	Competing Uses by Location Group	Nearby Street Parking	Total incl. Nearby Street Parking	Ratio incl. Nearby Street Parking
	Boat Ramp						Boat ramp			
1	A	20	40	**35**	**0.88**	**-5**	Motueka Nets	60	**95**	**2.38**
	B	20					Sea Sports			
	C	38					Sea Sports			
2	D	40	118	**53**	**0.45**	**36**	Tasman Bay Cruising Club	32	**85**	**0.72**
	E	40					Hardstand			
	F	33					Marina office			
	G	36					Hardstand			
3	H	36	167	**113**	**0.68**	**12**		29	**142**	**0.85**
	I	30								
	J	32								
4	K	20	39	**73**	**1.87**	**-44**	Motel	51	**124**	**3.18**
	Piles West	19					Commercial premises			
	L	49					Stevedoring			
	M	48					Commercial premises			
5	N	40	209	**66**	**0.32**	**91**		38	**104**	**0.50**
	O	40								
	P	32								
6	Piles East	15	15	**32**	**2.13**	**-21**	Akersten St traffic	32	**64**	**4.27**
7	Other	3	3			**2**				
1 to 7	**Total**	**591**	**591**	**372**	**0.63**	**71**		**242**	**614**	**1.04**
4 and 5	**Total K to P**		**248**	**139**	**0.56**	**77**		**89**	**228**	**0.92**

Source: WARDALE analysis

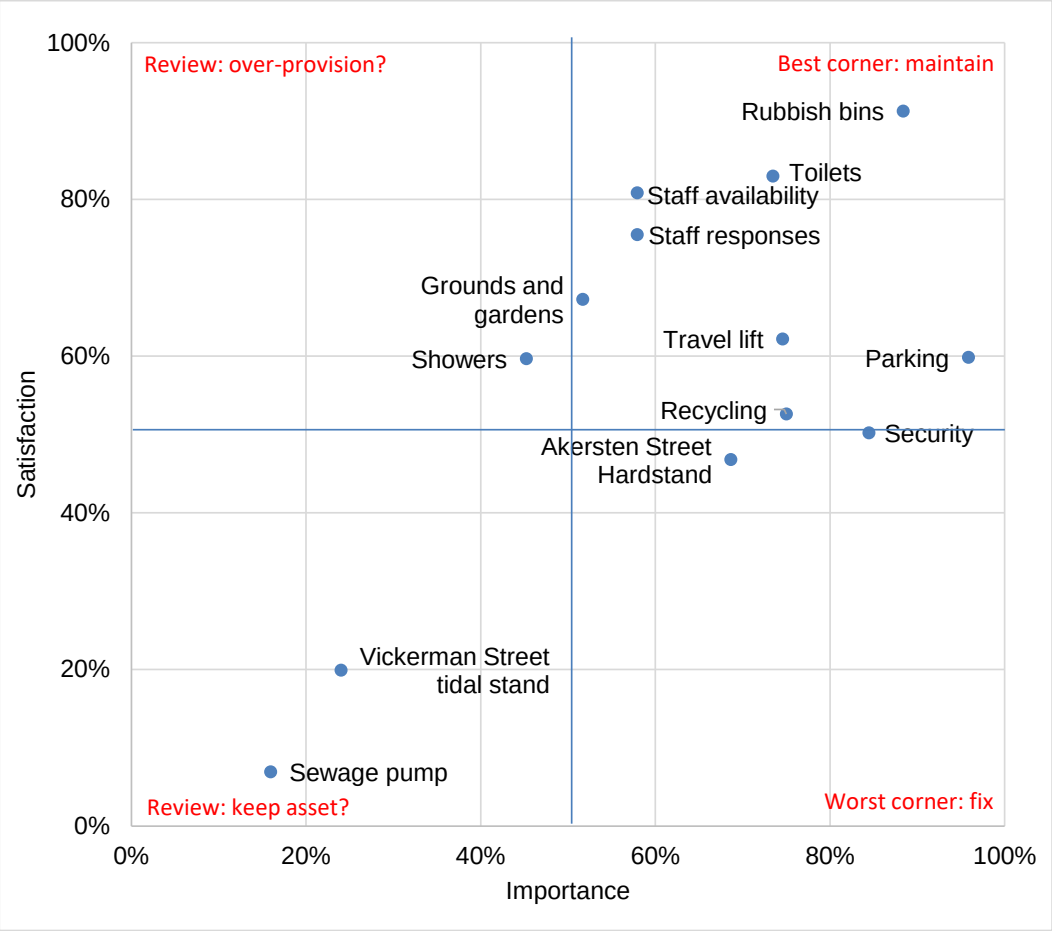
WARDALE
marine industry consulting

5. Customer Survey

2017 Survey – Satisfaction and Importance

The Akersten St hardstand and Security were important marina assets/services with low customer satisfaction.

- Parking, Travel Lift and Recycling were other important assets/services with mediocre satisfaction.
- We understand that recycling has been subsequently addressed by Nelmac.

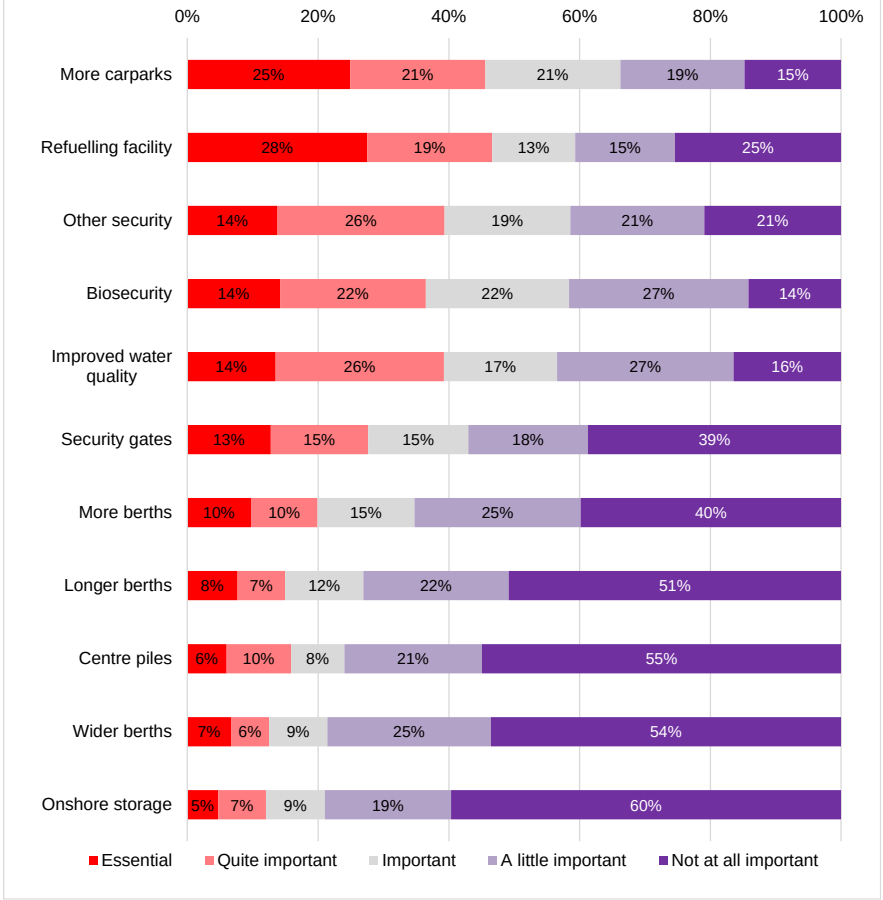


Source: Nelson City Council 2017 Nelson Marina, Wait-list and Akersten Street Boat Ramp Survey, Rob Greenaway & Associates

2017 Survey – Priorities & Willingness to Pay

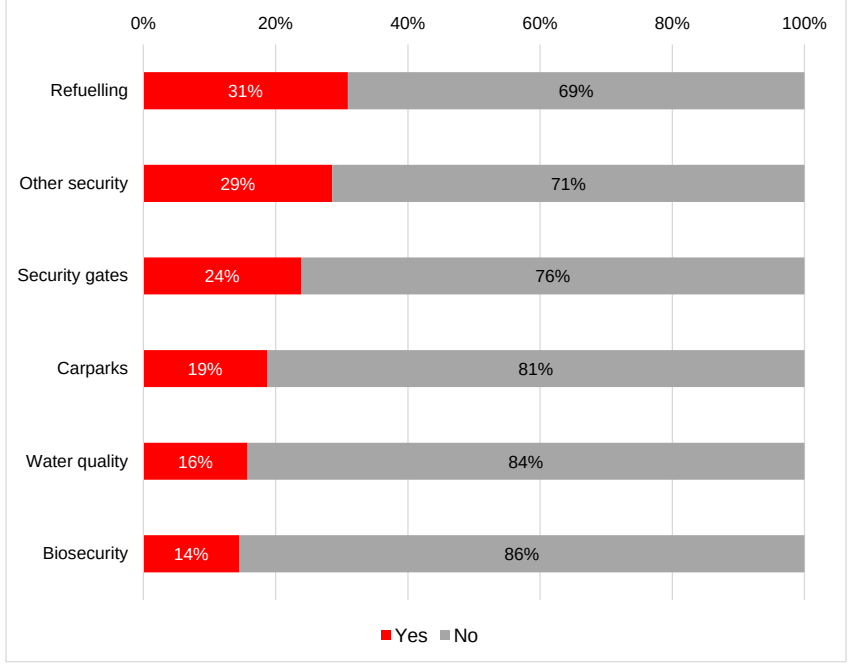
Parking, refuelling, security, biosecurity and improved water quality were the key customer priorities. However there was a relatively low willingness from users to pay increased berth fees for improvements (only 14 – 31%).

Priorities



Source: Nelson City Council 2017 Nelson Marina, Wait-list and Akersten Street Boat Ramp Survey, Rob Greenaway & Associates

Willingness to Pay



Source: Nelson City Council 2017 Nelson Marina, Wait-list and Akersten Street Boat Ramp Survey, Rob Greenaway & Associates