On September 11, 2014, the final conference for the Interreg IV-project **Yacht Valley** was hosted in Nieuwpoort, Belgium. Dick Takkebos, managing director of *Rho adviseurs voor leefruimte* was invited to present his vision on future marina development.
The world of water sports and leisure faces quite radical changes: ageing boaters, 'ageing' fleet, new types of water sports and boating holidays, services in marinas that strengthen or threaten other services…
This whitepaper attempts to put all these in a perspective to arrive at a sustainable spatial framework for marina development.

Future Marina Development: a sustainable spatial framework

The world of watersports finds itself in a heavy swell. Boat owners are ageing, their fleet as well. Boat ownership is taking on new forms and marinas are losing their appeal because of that spray painter or repair wharf being just a tad too close for comfort. Marina development is ready for a new, sustainable face. It is time for a fresh look on marinas, their environment and their stakeholders.

The Interreg IV-project Yacht Valley is living proof of just this. The fact that this step was taken on an international level, deserves praise. And moreover: it deserves national and international follow-up.

THE STAKEHOLDER BOTTLENECK

Development discussions as well as marina discussions are often executed too fragmented and too one-dimensionally to arrive at any practical conclusion. Different authorities or departments concern themselves with different stakes: economic benefits, environmental aspects, landscaping and spatial planning, traffic and permits. The industry focuses primarily on the financial perspectives. Residents and interest groups focus on the impact on their neighbourhood. This is only natural: each considers a development from their particular reality. More often than not, this leads to lengthy and sub-optimal decision making processes with corresponding results. Until recently, a lengthy procedure was no object, because almost every development concerned growth and its subsequent financial scope. Marinas mainly dealt with square mileage, number of berths, number of shipping movements, number of visitors, traffic volume and parking space.
However, the world has changed and is still changing at a rapid pace and chances are left unseized.

PLOTTING A SAFE COURSE

Assuming the role of a spatial planning 'helmsman', I would like to plot a course for you to safely sail through current context to future marina development. A course that integrates separate universes. The universe of the government: provinces, regions, municipalities. A universe in which the general wellbeing is leading and the interests of stakeholders, social and spatial institutions must all be considered. Then there is the universe of the water sports industry, businesses and associations, a universe primarily defined by business interests. Yet there is one all-important connecting force, a third universe: the customer. The customer is the end-user, the financial source and therefore the pilot to your business case. Moreover, the customer lives and creates his own living environment, depends on this environment and has direct influence on his environment. Both other universes would be wise to act from the customers interest.

This course leads to a sustainable approach of marine area development. The three well-known Ps: people, planet, profit, may also be applied to the water sports industry. Its social component considers the customer's needs and interests. Who is that customer, what does he actually want? This includes user benefits, living conditions, leisure facilities, residential quality and such matters as are listed in the blue circle. Business, or the industry itself, is primarily aimed at making money, yet also - when looking a bit further – for all that entails: customer needs, market insight, an efficient course of business, chain approach, logistics and so on. The physical domain and its interaction between use of space and values such as nature, landscape, cultural history, safety, energy and use of materials, is symbolised by the Planet. This is mostly the government's environmental and spatial universe.

Insight in and a proper interaction between these universes is essential for arriving at sustainable development, also in the water sports industry. Having no pretence of either being complete or scientifically accountable, we will loop into these. To see what is at stake and what the stakeholders – also those present in this room – can do to approach each other. I do sincerely apologise to any Belgian, English and French readers, but

I cannot escape basing my insight primarily on the Dutch and Frisian situation. Undoubtedly, there will be parallels.

The Three Ps

People: the customer

To put the social universe first: we will start with the customer. Friesland, a province in the North of the Netherlands internationally renowned for its unique landscape and water sports facilities and representative for the Dutch water sports industry. Frisians see water sports enthusiasts as people who 'carry their boat on their back'.

Frisian boaters are traditional boatsmen who as a matter of speaking use their boat as a floating caravan. A private vessel, boating holidays while staying on the boat overnight. For many years this description fitted a growing leisure segment, largely because of the economic rise of the middle classes. Most marinas had vast waiting lists, usually for the better berths. An ever increasing pressure on marinas, also caused by the ever-larger ships.

Those days are gone. The trends speak for themselves, as many studies confirm:

- The number of private boat owners is decreasing and boats men are ageing. The pre-war and baby boom generation are slowly abandoning ship. Many elder boat owners will stop boating over the next ten years.
- The next generations will use their free time differently and subsequently the role of water sports in that free time will change. The number of traditional boating holidays is decreasing. In the Netherlands, over a period of nearly a decade (2002 – 2011), the number has all but halved: from 920,000 to 520,000 boating holidays per year.
- The waiting lists for marinas are disappearing and the occupancy rate is declining (75-80% is the current average which is well below the critical rate of 90%),
- Not only the boat owners are ageing, the fleet itself is not getting any younger. Rundown ships are increasingly becoming a major issue to marinas.
- A considerable share, 6%, of the water sports vessels is currently for sale. Most vessels for sale are cabin vessels.

These facts do not apply to all water sports areas at the same way or in the same intensity. The development phase in which a particular area finds itself, is all-important. Eastern European and also German water sports are often in a very different development phase. Their particular qualities and opportunities are not yet fully explored and there is plenty of space for growth, also because of the vast hinterland.

Marinas in our traditional water sports areas find themselves – in view of the mentioned trends and aided by the economic situation – on a diversion: either rejuvenation or decline.

Then, you might ask, is there any perspective left for our water sports industry? Yes, there is. In the words the great Dutch philosopher Johan Cruijff: each con has its pro:

- Although the number of boat owners is declining, the number of water sports enthusiasts is not (the number has remained stable since 2008). Holiday expenditure in general has risen.
- Water sports are increasingly becoming a part-time activity. A pyramid of interest applies: as the group expands, the interest in a specific activity declines. Only a small group is prepared to spend a lot of money and time on its hobby. The others do want to… every now and then… when it suits them… but they are not about to move heaven and earth. Considering this, this target group may even be larger than we are aware of now. It is just a matter of finding the right way to include this group in the water sports industry.
- 'Ownership' will be replaced by 'usership'. The demand for rental boats is increasing. 'Boat-sharing' will be a new form of boat co-ownership, allowing more people to enjoy one boat. Consider it a form of apartment right or timesharing as a financially appealing counterweight for ownership or rent. This trend does not only apply to boat ownership, but also for holiday homes.
- There is a rise in demand for leisure diversity and combination of functions and activities. The high start-up costs for boating, purchase, maintenance, sailing licences etc, is often too large an investment for new boating generations. Taking passage is increasing in

popularity, think of tall ships, charter ships (a.k.a. 'brown' fleet) cruises etc.

- The decline in shipping movements. The boat is more often used for overnight stay. Boating holidays are becoming shorter. And there is an increase of berths outside the marina.
- Convenience is an important theme. The future water sports enthusiast wants to be active, yet does not want to be burdened with the responsibilities of boat ownership. There is a rise in demand for (temporary) luxury, the comfort of facilities, entertainment and the fun factor.
- There is still space for nautical services, if this is sufficiently supported. And also for marinas, sustainability is becoming increasingly important.
- Space is and must be created for the abovementioned trends and themes. It is by example good to see the rise of yards where old vessels are rebuilt into currently popular types.

'The customer', however, not only implies the water sports enthusiast or the tourist. Marinas also contribute to the spatial quality and the added value of their living and recreation environment. Marinas are better exploitable when other target groups than tourists are also catered for in its vicinity. Bars and restaurants profit from being near a marina. Houses are worth more when located quayside. A city profits from boasting a picturesque marina. Just think of Monaco or St. Tropez…

Development however can only be truly sustainable if it is supported by its surroundings. Not only supported in terms of acceptance or confidence by its neighbours, but it also needs to respond to current or future local industry and use. These factors will found a responsible exploitation, because they have already proven their worth. Think housing, labour, leisure, retail, overnight stay, traffic, shipping, fishery, coastal protection and new natural area. Just the type of puzzle a spatial planner would be thrilled to solve: combining these industries and uses for truly sustainable marina development.

Profit: the water sport industry

What are the challenges the water sports industry faces?

The marina operator must be aware of and act upon future developments in order to remain economically viable. In laymen's terms: create supply to answer to new demand. Rabobank, one of the largest Dutch banks, only last week offered marina owners and operators a report with a single clear message: more of the same is not going to save the marina in the future. To stand out, a marina must decide which profile best suits their customer base and surroundings. Distinctiveness and added value, as in so many other industries, will also determine who is fit for the future in water sports.

Knowing your target groups, knowing what moves them and how they spend their leisure money is essential. How does the industry obtain that information?

One such tool to obtain insight into target groups is the lifestyle approach as used in Smart Agent's BSR-model. This model distinguishes four types of tourists based on their experiences and preferences, deriving from two dimensions: their social orientation (activities as individual or in a group) and their psychological (thrill or leisure seeking). The four types are:

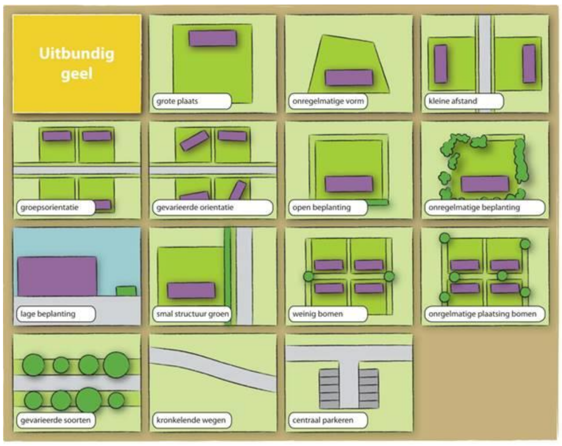
- Red: vitality, progress, freedom
- Yellow: harmony, cosiness, spontaneity, social
- Blue: control, ambition, success, status, career
- Green: security, protection, quietude

This model can also be applied to water sports, to chart the target group, their origin and their expenditure pattern to subsequently differentiate the supply. HISWA, the Dutch water sports industry organisation, has already successfully applied this model in the industry.

Within these four types, seven target groups are distinguished:

- Inspiring and creative red: creative, adventurous people, who push their boundaries, looking for thrills and experiences: windsurfing, jet ski, water-ski etc.
- Enthusiastic yellow: epicureans, those who enjoy activity in the company of others and look for active leisure: canoeing, sailing schools.
- Business-like blue: self-assured tourists who afford themselves luxury and stylish leisure: speed boating, luxury yachts, cruises.
- Quiet green: those who enjoy their quietude, who look for relaxation and enjoy nature,

museums, picturesque harbour towns, whisper boats.



The seven groups include three mixed styles:

- Adventurous violet: adventurers looking for surprising and inspiring experiences, especially culturally: see sailing, tall ships.
- Modest aqua: those looking for profound experiences, interested in nature, culture and meaningful social participation: sloop, smack, brown fleet.
- Cosy lime: ordinary pleasant people escaping their everyday concerns.

What is truly interesting is taking this model and translating it on a micro level in marina design and services. This will be dealt with later in this whitepaper.

Business model

Alongside the shifts in target groups and their demand, the marina business model is also changing. Changes are detectable on three levels:

Firstly the level of the individual marina: at present their largest income share is made up of berth dues, 80%. Decline in boat ownership, boat sharing, rent etc. means decline in occupancy rate. Commercial marinas (in the Netherlands, 50% on the total amount of marina's is commercially owned) do not compete with other commercial marinas, they also have to take marina associations into account. These profit from fiscal advantages, volunteers and often lower costs and therefore charge lower dues. As a result the price system of commercial marinas is disproportional to the costs. As a necessity, commercial marinas then have to offer extra services. New business models will largely be based on alternative sources of income such as bars and restaurants, boat rental, retail, services etc. A new business model in which the sum of elements has to be profitable, not the elements separately. See it as a supermarket model: you lose on the low price of cola, but you carry it because the customer buys it. The profit is made in the total of products bought along with the cola.

The second level is area development, the immediate vicinity in which the marina plays its role. Over the past decades, business models were mainly based on new developments, growth and expansion. This has made a U-turn in rebuilding, redevelopment, quality improvement and fair reallocation of scarce space. These changes are already visible in the current market. You can already detect a surplus in traditional supply. Quality improvement or reorganisation of unprofitable water sports companies will be necessary and requires new investments and funding. This has been happening throughout the leisure industry for some years and will be necessary in water sports shortly. New viable developments will serve as economic stronghold to enable reorganisation of those services which are at the end of their lifespan. Dutch spatial planning principles as 'new for old', 'space for space' and the 'ladder for sustainable urbanisation' serve as foundations for such developments.

The city of Rotterdam experiments with the concept of the 'floating city': living and residing on the water as an answer to the ever rising sea level and growing land scarcity. Although this may seem futuristic, the water sports industry soon may well demand a leading role in such concepts to contribute its knowledge and experience.

As in other areas of development, the days of fast money will be gone in the water sports industry as well. Sustainable and viable development demands continuity, (re)usability and flexible exploitation of new services for the entirety of the project's lifespan. Use of land and real estate are replaced by an integral revenue model that focuses on the phases of use and stewardship. This will also include future revenue models based on future land and real estate use. As a result, cost recovery will take longer and the investor commits to a responsibility of the full lifespan of the project. This brings us right back to the customer in all its manifestations. A social cost-benefit analysis allows insight into the financial consequences of those aspects that are not immediately visible. This will shed light on the long-term impact of a development on its environment. A social cost-benefit analysis provides commercial developers with a tool for convincing government decision makers of the broad economic, the social perspective and added value of a marina.

From the sustainability perspective it is sensible to include the marina's neighbourhood in financing and exploitation. Especially since traditional capital providers such as banks have become more strict, involving your neighbours may offer a solution. Crowdfunding (through shares, bond loans or exclusive services as awards) is not just financially appealing, it will also commit the neighbourhood to the development. 'My project' will become 'our project' in shared ownership. We can look to wind energy projects for positive shared ownership references.

The third level of change for the economic model is the region.

Since the customer is no longer tied down by a privately owned boat – and as such by the boat's berth or its cruising range – he is free to decide where to spend the holidays. This accounts for a decline in competition between marinas and maritime service industries in a certain area. Yet the completion between regions and water sports versus other leisure industries has subsequently intensified. Because the customer may easily choose not to go sailing or boating. Perhaps this year he wants to go golfing, hiking or biking. Winter sports have already fully jumped on that band wagon: the tourist will be happily received with complete services: free transfer by ski bus, hotel child care for skiing parents. Combined ski permits connect villages and ski slopes. Routes are clearly marked. In case of accidents, the banana or helicopter is immediately on site. And its marketing is up to par. In October ski regions send out e-mails inviting former guests to please visit the Zillertal Arena, the Salzburger Sportwelt or the Ski Amadé. The essence being: co-operation within the industry to lure the tourist into that specific region.

The water sports industry may find inspiration in other industries. When leaving a port one is supposed to land somewhere as well. And a marina or port is also a gateway to the land behind the dock. Attractive docksides, interesting cities, scenic nature routes, fun theme parks and so on. This may well be the reason for the continued popularity of the Frisian Wadden islands: easy land access from the water and easily discovered by foot or by bike.

Water sports businesses operate in a network that offers a complete experience. In this network, the marina does not stand alone, but is a part of a complete palette of water sports services in an area or region. The specific position of a company within this complete package accounts for much more than just being bigger or better than the company next door. A company which, to be honest, offers nothing more than exactly the same services.

ENVIRONMENT AND SPATIAL POLICY

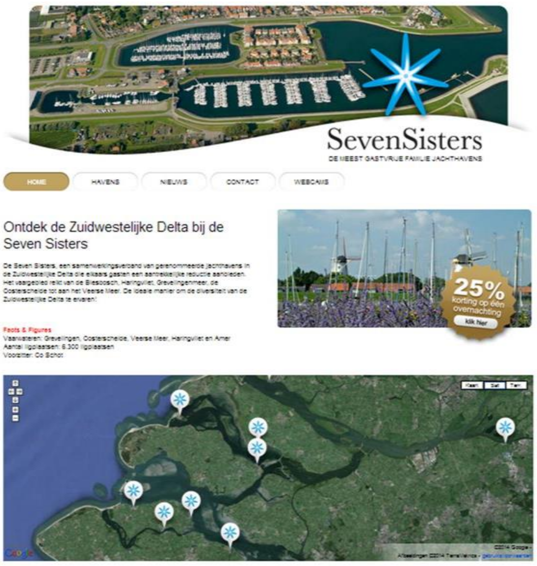
What is the role of the environment (the third of the three P's: Planet) in sustainable marina development? Of course this universe determines the physical context in which demand and supply meet. Spatial planning helps to make sound planning decisions. Also here three levels can be distinguished.

These levels will be dealt with in reversed order: the region. It is instrumental that the region considers itself as an entity. Obvious boundaries are administrative ones: municipalities or provinces. Yet in a large number of cases, the boundaries are not defined. In interregional or international interaction the sense of acting as an entity is often lacking. Sometimes you might see bilateral cooperation, but there might still not be an integral approach. This latter forces a region to consider itself as an entity within the leisure industry and operates as an entity by making conscious decisions about which target groups to pull and the services to offer.

At first a region must determine its uniqueness. What is your best selling point? What are your qualities? But a region must also be honest in finding its weakest or missing links. This requires a thorough area analysis, executed in cooperation with government, stakeholders and the environment. Starting points are present values and qualities. These form the basis for present and future use. Qualities such as nature, cultural history or landscape next to housing, residence and leisure. Routes and connections are mapped, as well as recreational facilities. Support for berths and nautical services can be defined and used as a basis for sound decision making. Are these to be combined or separated? Villages, towns and sub regions are given their particular accents, allowing one town to act as technical service hub and another to focus on day recreation and entertainment, a third on active city life, or experiencing nature or cultural history and so on. The life style model helps as a tool.

The result is smart use of existing environmental qualities in designing a balanced future living environment for present and future users. And the analysis will also serve as a foundation for a combined PR- and marketing strategy.

An example of such a marketing strategy is the Seven Sisters, marinas in the South West Delta who co-operate by stimulating their guests to explore the area from each other's ports.



This context serves to design the sub areas. What is important here is coordination of functions. Clearly, not all functions are easily positioned within or around the marina. Think of high environmental impact functions, such as spray painting, cladding, repair yards. In many harbour towns, the berths are therefore part of the city centre, and the nautical services and parking spaces are located outside tourist areas.

Gruissan in France, is a good example of this separation of functions. It combines functions that strengthen each other and separates high impact functions, yet logistically they are logically zoned, either by road or on the water. Another fitting example in France is Port Grimaud, where water sports are combined with housing, retail, hospitality in a complete water village. Here also road traffic and high impact functions are zoned specifically to create a pleasant leisure climate. Port Grimaud hosts hundreds of thousands of guests each year, by land and by water.

A logical approach, I hear you think. However, in reality not all port towns are planned as such. In Sneek, Friesland, the town has come to the conclusion that the port industrial area ‘Ges’ offers pretty little water sports entertainment. This area is a stepping stone between the lake Sneekermeer and the historical Sneek town centre by water. Boats are berthed without any leisure facilities, making long term overnight stay unattractive. And off course there are even simpler examples. Chattering stags keeping residents up at night in Zeewolde port. In the north of the Netherlands, a complete sloop route has been constructed with European subsidies according to the *Elfstedentocht* (Eleven Cities Skate Tour) principle. The route runs through an area that has hardly any boating facilities for mooring or berthing as well as hospitality or shopping etc. Until now, hardly any boaters have visited. Or the removal of shoring as ordered by the Frisian leisure authority for nature friendly banks, resulting in leisure boaters avoiding the routes because they were unable to land at these banks. Plenty of reason to consider the effects of one measure on other purposes. The leisure authority has reacted by building docks for boaters to land without damaging the bank vegetation. Pity about the time and costs…

But there are also positive examples. Sailing boats have entered the city of Leeuwarden from the Frisian lakes by a standing mast route. And the municipality is implementing a sloop route from the suburbs to enable people who have home side berths to boat directly to the city. This provides a considerable enrichment and impulse to the city centre which suffered from the recent economic crisis.

These examples show that the common cause is priority in planning. This requires sufficient knowledge of and insight in the stakes and values. Not only of environmental aspects, which are often protected by legislation and policy, but also of water sport specific characteristics and operations. Imagine the position of a marine business in the chain, its logistic effects, its spatial effects and its environmental effects.

This connectivity has been made visible in ‘Business Behind the Boat’ for the Marine Leisure Cluster. It describes business typology, connectivity and spatial and environmental context. It offers a guideline for both the professional and the layman in developing, designing and planning marinas. Hopefully it will constitute a connecting element for all parties to achieve sustainable marina development.

On the level of the individual marina, the life style model helps in designing areas and centres or on micro level, the design of marinas and services. In overnight leisure this model has been tried and tested. Rho consultants compiled a guideline in which the life style model has been translated into design principles for camping sites. This allows camping site owners to fully optimise their site to the desired tourist experience. This can also be implemented for marinas. Considering the aforementioned trends, the single type marina has no or little viability.

Take for example the life style approach in Bad Hindeloopen on the IJsselmeer, a combined marina and leisure park. Bad Hindeloopen focuses on the yellow and green life styles, young families and active pensioners boating around Friesland. It offers water and land leisure facilities, a swimming pool and children’s activities, a supermarket at walking distance. The park is a gateway to the hinterland, to be explored by boat, car or bike. The fact that the park is outside the dykes has been well considered in its design and it focuses on protecting natural values. As a consequence, the development did not even require an Environmental Impact Assessment.

Havens à la Carte (or Marina Menu) offers marina typology which allows ports to be clearly positioned within this new context. It is an initiative of three consultants and water sports enthusiasts who have introduced an new way of thinking about marinas, in co-operation with HISWA, the Dutch resource centre for coastal tourism and Rho consultants.

Marina Menu arranges marinas according to target group, appearance, services and spatial and functional connectivity to their surroundings. A perfect tool for making economic and spatial policy and thereby clarifying the opportunities for water sports development.

COOPERATION AND MANAGEMENT, A SUSTAINABLE APPROACH

Returning to our primary question: what do we need for a sustainable 3P-approach?

Acting according to the changes outlined earlier, requires a balance between spatial, financial and social reasoning. What is ultimately important is the common good and shared values in these three universes. This demands a new way of thinking by all parties. A way of thinking that dares to let go of old judgement and depart from shared challenges and opportunities. Legislation is always one step behind development and only guards the status quo. In a changing environment, innovation and development must be given ways and space to grow. A sustainable spatial framework offers flexibility and allows for future functions. This is not achieved by nailing down what is desired, but by excluding what is undesired. This will leave room for renewed development and innovation. A model which also promotes new techniques for renewable energy sources and reuse of materials.

A sustainable approach is determined by the measure in which we are capable of combining the interests and values of the three universes in a well-balanced manner. Only then there will be true sustainability. Matching the social and physical will make development bearable. Matching the social and financial will make it equitable. Matching the physical and financial will make it viable. All very worthy, but not future-proof because in each a universe is missing.

A fine example of just such a sustainable concept is the sustainable marina of Brouwersdam, Ouddorp, Southern-Holland. Rho consultants is proud to have contributed to its concept, design and studies, i.e. ecology. This is a project on the intersection of the universes drawn in this whitepaper.

1. It was designed as an open and public concept. Open to all. Respecting its future inhabitants and visitors and integrates nature, fishery, retail and leisure.
2. It respects its natural surroundings, its morphology and the natural banks of lake Grevelingen. Its design improves water quality and biodiversity.
3. It adheres to Zeeland's economic foundation: water sports and leisure in all its forms.

In short, a step towards a new international standard for leisure, a sustainable framework for future marina development.

Finally, it must be obvious that all of the above will not happen without clear cooperation and management. A regional approach demands organisation and allocations of tasks and duties. Between all parties concerned, be they public or private and always in line with its environment. Parties will rely more than before on each other's qualities and competences. The government may propose conditions, financially as well as spatially. By improving infrastructure or by formulating attractive policy, which focusses on possibilities instead of threats. In The Netherlands we use the terms invitation planning or even seduction planning.

Now it is up to the leisure universe to succumb to that seduction.

Dick Takkebos