Waterways for Growth

handbook spatial characteristics

water sports industry

European Union The European Regional Development Fund

The Interreg IVB North Sea Region Programme

Investing in the future by working together for a sustainable and competitive region

PREFACE

Dear Partners of Waterways for Growth,

It is my pleasure to present you the Yachting Handbook as the product of Dutch Recreational Waterways and Hiswa Holland Marine Industry. Dutch Recreational Waterways is partner in the Interreg IVC project Waterways for Growth. Waterways for Growth is a project with the key aim to promote sustainable growth in the region. Inland waterways can act as a catalyst for economic and social regeneration of the communities alongside them by providing attractive places to work and live, linking towns and countrysides and creating jobs in tourism and transport.

All over the region there are several (old) industry zones and harbours that could be transformed in regional multifunctional industry zones for the yachting industry. By concentrating the supply chain of the water-bound industry and by centralising crane facilities the yachting zone can provide an economic impulse to the region. It is important that such spatial implications are identified at an early stage and measures put in place directed to the regeneration of old industry zones. This handbook, which includes yachting industry related facts and figures such as employment, environmental aspects, public development opportunities and safety can be used as a tool for city councils, planning departments and developers.

Although this handbook should be considered as "work in progress" and although there are still some minor deficiencies, I decided to give it the status of a report and to produce a nice printed version.

I hope that this first version of the handbook will inspire all of us to continue with our work using the same high quality standards which we have used until now!

Best regards,

Nico van Lamsweerde
Director Dutch Recreational Waterways

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1. INTRODUCTION

Improving the facilities for the water sports industry

In 2008 a large number of cross-border subsidy programmes were begun. Under the collective name of Interreg IV "knowledge and innovation at the service of People, the Environment and the Economy" was stimulated. The Dutch Recreational Waterways Foundation (SRN) has taken the initiative to draw up a stimulating project under the working title of FAWI - improving the FAcilities for the Water sports Industry- which has resulted in this handbook spatial characteristics water sports industry.

Recreational water activities are growing strongly and the water sports sector can provide an important impulse for spatial development in cities that lie on the water. The sector is labour-intensive and offers employment for all of the educational profiles. This sector is also the leading one in inner-city development and harbour-front development.

The challenge for the water sports industry is to have one of the proposed options worked out. It must be realised that the water sports industry in most countries can be classified as small-scale and split up. The cost-effectiveness of the traditional water sports company is under pressure. When a company is sold or transferred, the location is more valuable if used for a new purpose (project development) than if the company activity is continued. Consequently, important acres are lost to the sector. And there are many examples of places where shipyard activities are under pressure from the expanding construction of houses in the area.

- *It is necessary to work at creating a desired future scenario for the water sports sector.*
- *There must be space for entrepreneurs to establish themselves on/near the water. Clustering and up scaling will lead to a more efficient use of space.*
- *More insight is needed into the possibilities of combining functions at yacht basins and at outdoor areas with combined use (along the shores of many lakes, canals and rivers).*
- *Discussions about new usage and new subdivisions must be given a place in spatial planning and included in the structural visions to be created.*
- *Knowledge about the possible locations, wishes and preconditions of the water sports sector has been gathered and has led to this "Handbook spatial characteristics water sports industry".*

This handbook contains a detailed classification of the sector with location characteristics such as fte/m^2, environmental zoning, costs per mooring, yield per mooring, economic added value, etc. This knowledge should be disseminated to all of the spatial planning departments of local governments so that an option for a nautical company concept can be included in future territorial development.

The handbook has a technical look and feel and includes tables and lists. Information is given for each type of company and also for logical combinations of functions. Finally, some innovative combinations of functions are proposed.

Goal of the Improving Facilities for the Water Sports Industry FAWI project

The goal of the project is to further professionalise and (economically) strengthen the entire water sports industry by means of sustainable development, upgrading, positioning, quality improvement and cross-border collaboration of the water sports sector (yacht basins, construction, storage and maintenance) in the area at the Flemish-Dutch border or in the maritime region of south-west Netherlands, west Flanders, northwest France and south-east England.

Although the consideration of interests in each planning process will lead to its own particular result, a number of standards and rules of thumb have developed in town and country planning, and these are unofficially used as a rough test of the feasibility of a plan.

The criteria, that are expressly not intended to be standards, concern a certain 'theoretical land use' for various forms of use and divided into various 'purposes'.

Particularly in this present time of economic stagnation, these criteria should be viewed very critically. In certain cases it may be necessary not to follow the criteria in order to ensure that a plan can be realised economically. This must, of course, be apparent in the explanation of the plan.

Direct economic effects of boating include changes in sales, employment, income and value added in businesses that sell products and services directly to recreational boaters. This includes marinas, boat yards dealerships accessories retailers, boat yards and insurance providers, and restaurants, lodging establishments and food stores.

Let's help the city planner

- *Provide up-to-date information*

A book. A Guideline. A Manual. A Standard

- *The yachting industry clearly classified*
- *With characteristics on fte/m2, environmental aspects, specific needs (docking area, minimum heights, doors)*
- *Logical combinations of functions*

2. OUR PARTNERS

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Provincie West-Vlaanderen, Belgium
Address: Peter Benoitstraat 13, 8800 Roeselare , Belgium

3. HOW TO USE THIS BOOK

In a 'land use plan' is determined which uses or functions locations should be used for and what and where construction is allowed. In the current planning, it is not customary to include the characteristics of the water sports industry in the development of an area. This handbook complements the existing features.

Water sports is a strongly specialised sector in which the collaboration between specialists creates a comprehensive service for ships and captains. Numerous companies work on the various aspects of water sports (windows, carpentry, sails, steel, polyester, cushions, brokers, shops with accessories for ships, electronic equipment, etc.). Because these specialists can only work in collaboration with one another, they increasingly offer their services from one collective location. This can be in combination with a yacht basin but it can also be a technical service area that may have winter mooring.

Waterfront locations, where ships can be taken out of the water, are the best locations for this function. They must combine an outdoor area (for temporary mooring, repairs, etc.) and an indoor area in the form of sheds that are sufficiently high (at least 8 metres). They must offer room for some limited office work and perhaps for showrooms. Locations with several separate rooms are preferable.

Shipbrokers, boat dealers, dealers of ship parts and ships chandlers operate in areas near the water. These functions complement each other and form a cluster. The character of the location is more upscale and less traditional than the nautical service centre. Showrooms determine the appearance of the location. In many cases, shipbrokers and dealers will also need docking space in order to display their wares. A combination with a yacht basin is the obvious solution.

Combinations
In practice all company concepts are offered in combination, often at yacht basins. The purpose of this handbook is to give municipal and provincial authorities a global view of the various possibilities. Without any knowledge of water sports or the water sports industry, this handbook gives them a first global overview of the possibilities related to:

- *Spatial planning for water*
- *Spatial planning for land*

What sort of water sports company can or cannot be allocated a place in the 'reconstruction' of the (industrial) area. The first inventory gives insight into the following points:

- *Some water sports companies need a location directly on the water.*
- *A location near the water is enough for some water sports companies.*
- *Some water sports companies – e.g. a water sports shop or yacht basin - can be near buildings (note: yacht basins often have winter mooring at the quay and are not suitable near buildings).*
- *Some water sports companies – e.g. shipyards – cannot be near buildings.*
- *Some water sports companies must be on the ground floor whereas others do not need this.*
- *Some water sports companies – e.g. appraisers, architects or brokers - can share an office.*

It is important to realise that most water sports companies offer a number of products. A yacht basin often offers winter mooring, maintenance and repairs, and there is often a water sports shop, a (small) supermarket and sometimes a dealer/importer on the grounds. This makes it easier to manage costs and to offer customers a total package.

STEP 1

Describe existing industrial terrain by filling in basic information on a sheet
Description of area, inventory of what is present

- Buildings
  - Number of buildings / sheds
  - Sizes, maintenance, can they be reused?
- Infrastructure (e.g. accessible by train, car, bike)
- Size of water; Surface, Depth, Quay and pilings
- Connection with waterways (CEMT class, BRTN, SMR, etc.).
- Any bridges, locks, banks, etc.
  - Are these in operation?
  - Do they meet the standards (e.g. vertical clearance) (BRTN)

STEP 2

The grounds can be laid out with the location characteristics per professional group. For example, a shed that is 30 x 60 m (ground floor) and 30 x 50 (first storey) could be laid out as follows:

Ground floor

- A simple (harbour) office for nearby harbour
- Sanitary facilities for nearby harbour
- A water sports shop

First storey

- A sail maker or room for, for example, sailing instruction and courses

STEP 3

The results of STEP 2 must be tested against the environment.

- What is possible according to the zoning plan?
- What is already present in the environment and what features are still missing?

STEP 4

This rough sketch can be tested by an engineering office or advisory office by means of the implementation of a feasibility study

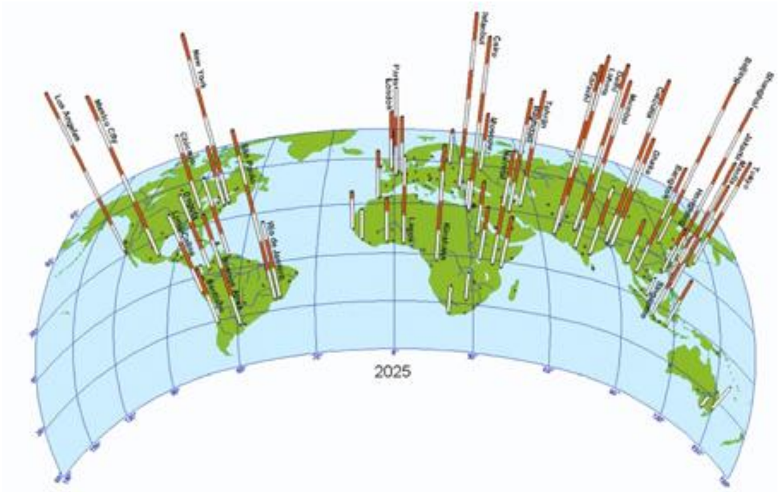
AQUAVERIUM – www.aquaverium.nl

A nautical centre and 'boat boulevard' in Grou (the Netherlands) containing a permanent boatshow (75.000 visitors per year), a water sport shop, a yacht broker (inside and outside sales marina), winter storage (inside and

4. A DESCRIPTION OF THE WATER SPORTS INDUSTRY

4.1. GLOBAL/EUROPEAN – THE GLOBAL & EUROPEANSITUATION

Water sports is distributed worldwide. Worldwide inland waterways, linking cities and the countryside in between, are very important for the transport of raw materials, wastes, finished products and persons. Nowadays these waterways are becoming increasingly important also for tourism, recreation and sport. The figure below shows that many large cities are located close to the water.



There are several organizations at World and European level engaged in water sports.

ICOMIA | International Council of Marine Industry Associations
ICOMIA represents the voice of the recreational boating industry worldwide AND HAS been the focal point of the industry since 1967. ICOMIA's multiple committees address the issues challenging our industry and benefit from our truly global membership. No less than 34 national federations across the world are full members of ICOMIA today. THE members include the vast majority of the industrialised countries from North America across to Japan and from Finland down to New Zealand. If a national boating industry federation is a full member of ICOMIA, THEY will also BE actively represent you as a member of the boating industry. ICOMIA presents a strong and united voice in representing the industry's best interests when dealing with international authorities and major organisations.

EBA | European Boating Association
Founded in 1982, the EBA aims to ensure boat users are informed and consulted about EU legislation and to make their views known to relevant European Institutions. We work on a wide range of issues that impact upon boating within Europe and when necessary make appropriate proposals to national and European governmental organisations. Our work embraces environmental, technical and regulatory issues together with specific projects such as the promotion of the International Certificate of Competence and representing the leisure interests of the inland waterways of Europe to the UN/ECE Inland Transport Committee
ISAF | International Sailing Federation
The world governing body for the sport of sailing was created in Paris in October 1907. It was initially known as the International Yacht Racing Union before the name was changed to the International Sailing Federation (ISAF) on 5 August 1996. The International Yacht Racing Union (IYRU) evolved from the need for racing sailors to have a uniform set of rules and measurement standard and there is now a system of rules and measurement that are used world-wide in all sailing events.

MYBA - The Worldwide Yachting Association
The Worldwide Yachting Association is an internationally renowned professional organisation, founded in 1984, whose members are involved at all levels within the Super yacht Industry. Members of MYBA are widely represented in all fields of brokerage, charter, technical management and construction of large yachts.

MYBA guides its members on the highest ethical and technical standards, ensuring Corporate and Individual Members meet the requirements of the Rules of Conduct.

4.2. THE NETHERLANDS

The Dutch water sports industry consists of almost 4,500 companies that employ about 30,000 people (UK 4,200 companies that employ 32,500 people). The annual turnover is about 3 billion euro's (in both NL and UK). It is a much diversified sector. The pleasure craft line has grown considerably in the period following WWII. In 1950 there were about 20,000 pleasure craft in the Netherlands, in 1975 there were nearly 140,000 and in 1997 about 265,000 (ships longer than 6 metres).

In 2005 there has been a large and unique survey about the number of pleasure yachts in Holland. The outcome was that there are a lot, that are frequently used.

1. Boats in the water (located in marinas and water sport companies)	*162.000*
2. Boats in the water (located along water ways and (holiday) houses)	*36.000*
3. On shore but frequently used	*210.000*
4. On shore, have not been used and probably will not be used	*100.000*

In total there are around 500.000 recreational boats in both The Netherlands and the Great Britain. The numbers of recreational boats has grown steadily in recent years, which has put pressure on the demand for moorings and marinas. This growth is common in the most European countries. The expectation is that the current recession will relieve pressure for the next few years until the economy begins to grow again. In past recessions, there has been a lag between the recession happening and it having an effect on boat numbers. For example in the early 1990s, boat numbers stopped growing for a couple of years about two years after the recession began to bite. This could cause problems in the future as during a recession investors tend to put on hold investment in new marina facilities. This means that when the economy starts to grow there will be again a shortage of moorings. In Holland some used old boats are exported to Eastern Europe, but there are a lot of boats on the second hand market. Boats are not destroyed or recycled very often, but that will happen more often in the near future. Specialized companies for the destroying of polyester and steel boats are growing in number.

The Dutch Maritime Network Cluster
The Dutch Maritime Network was established in 1997 in connection with the introduction of a new Dutch shipping policy. It is a private organization whose goal is to promote and strengthen the Dutch Maritiem Cluster. This cluster consists of the maritime components of the following sectors: Shipping, Harbours, Offshore, Hydraulics (dredging), Inland navigation, the Navy, Shipbuilding, Maritime suppliers and Fishing. Together these sectors form a very comprehensive maritime cluster; the sectors and the companies in the sectors are often players on a European or global level. The organization operates as a network in which "clustering" activities are undertaken. It does not act as an umbrella organization or an advocate. The Dutch

Maritime Network has a Board of Directors consisting of prominent persons from various sectors, a directors' consultation in which the most important (branch) organizations in the various sectors participate and a small office. The activities of the Stichting are grouped around five themes: communication, export, innovation, labour & training and Europe. Fora and task forces have been established for these themes with representative from participating (branch) organizations:

In Holland, the building of small yachts accounts for 42% of the water sports industry, with 58% operating water sports-related services.

Source: 'The Dutch Water Sports Industry, Economic Significance and Structure', 1999, Dutch Maritime Network.

Some trends are emerging in the Netherlands:
- The sailing season is becoming longer.
- The length of boating holidays is becoming shorter.
- There is an increasing need for luxury and easy-to-use facilities.
- There are more foreign water sports enthusiasts, especially Germans.
- Yachts and yacht basins pay attention to sustainability.
- Yachts get bigger, wider, deeper and sea worthier (more and better equipment).
- Increase in the number of motor yachts (15 metres plus)
- More motorboats compared to the number of sailing boats.
- These motor yachts can be found on larger waterways because of the high range.
- More small but luxury open motorboats
- The average age of a boat in the Netherlands is 13-14 years old. After this, the boat is often exported to countries in Eastern Europe. The water recreation sector is growing by 2%-3% per year.
- Water sports enthusiastic are using the internet for buying, selling, renting and finding leisure areas and products.

Opportunities and threats
- The aging population has a lot of leisure time and a relatively high income to spend. They often pay to have their boats maintained. Both small-scale water recreation and cruises can profit from this group.
- A connection from the yacht basin to the recreational activities in the area strengthens the yacht basin's position.
- Yacht basins can distinguish themselves by creating extra facilities and offering more luxury and comfort; especially important for yacht basins in areas where the waiting lists are becoming smaller.
- More regulations, such as environmental regulations and nature and water regulations. For example, as of 2009, toilet water may no longer be discharged.
- The nature guidelines in Natura 2000 have resulted in uncertainty in the recreational sector.
- The security level of pleasure craft is not sufficient. The security of a middle-sized car is much better than that of a (much more expensive) small yacht.
- Disparity in growth between invested capital and exploitation possibilities.

<u>Perspective</u>

Relatively stable turnover

Water sports forms a relatively stable branch in recreation. The capacity utilisation at most companies is high, and the holders of permanent moorings form an important part of the turnover. The relatively good summer weather in 2010 favoured the yacht basins. Nevertheless, the branch is affected by the economic crisis because both transients and holders of permanent moorings spend less. This means less turnover in, for example, restaurants or the water sports shop. And, due to the economic crisis, fee increases are not easily passed on to the customers. In addition, there are also those yacht basins that deal in boats and/or build them themselves. There is a considerable likelihood that these companies will feel the effects of the crisis.

Future perspective

Despite the fact that the capacity utilisation at yacht basins is high, not all companies are doing well. In order to serve the demanding consumer, it is necessary to invest in extra facilities, comfort and luxury. Commercial harbours with few facilities do not have as favourable a future perspective as modernised yacht basins with extra facilities. This is becoming clearer now that waiting lists are disappearing at many places. Entrepreneurs in the branch are also aware of this. In the past few years, large investments have been made, also in new harbours. The average quality of yacht basins is increasing. This will have to result in higher fees.

Source: Rabobank Figures & Trends 'reliable branch information' October 2010

THE WATER SPORTS INDUSTRY

As the branch organisation for companies in the water sports industry, HISWA Association keeps a record of figures and facts about the branch. Below is a summary of the most important information (2010/2011).

WATER SPORTS INDUSTRY GENERAL

Total number water sports companies	4,200
Those having water sports as main activity	2,200
Gross annual turnover	2.55 billion
Amount of gross annual turnover exported	1.5 billion
Number of persons employed	30,000

CORE FIGURES HISWA ASSOCIATION

Established in	1932
Exploitation turnover (€ mln)	8.5
Office organisation FTEs (incl. Ltd.)	35
Number affiliated companies	1,200
Share in branch turnover	circa 70%
Number members aimed at consumer	80%
Number regional offices (North, Middle, South)	3
Number external committees in which HISWA participates	145
Name recognition in branch	100%
Name recognition among water sports enthusiasts	about 98%
Name recognition in the Netherlands	88%
Number of projects related to water sports	290

Affiliated with:	VNO-NCW
	ICOMIA
	European Boating Industry
	SGC
	SRN
	NML

CONSUMER MARKET

Number water sports enthusiasts in NL		1.5 million
Number vessels in water at harbours and companies in	Friesland	28,000
	Groningen	3,000
	Drenthe	1,000
	Overijssel	8,000
	Flevoland	9,000
	Gelderland	14,000
	Utrecht	8,000
	Noord Holland	34,000
	Zuid Holland	33,000
	Zeeland	14,000
	Noord Brabant	13,000
	Limburg	11,000
	Subtotal	176,000
Number of vessels in the water at other places		37,000
Number of vessels on shore that are still used		210,000
Number of vessels on shore that are no longer used		100,000
Total		**523,000**
Divided into sort:	Cabin sailing yachts	194,000
	Cabin motorised yachts	146,000
	Open sailboats	33,000
	Open motorboats	42,000
	Flat-bottom boats	8,000
	Canoes, kayaks, rowboats	100,000
	Total	**523,000**

MORE INFORMATION
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Source: HISWA Association (June 2011)

5. COMPANY GROUPS IN HISWA ASSOCIATION

HISWA Vereniging distinguishes between the following thirteen company groups: Yacht basin and Mooring, Rental of pleasure craft, Sailing instruction, Dealers and retail trade, Importers of pleasure craft, Suppliers, Importers of engines, Yacht building, Yacht service, Brokers, Appraisers, Sail makers & Riggers & Furnishers and Architects.

Architects	
	Architects/designers

Dealers & Retail trade	
	Dealers engines
	Dealers pleasure craft
	Dealers surf and ski material
	Retail trade/shops

Appraisers (HQYS)	
	Appraisers/assessors

Importers of Engines	
	Importers of engines

Importers of Pleasure Craft	
	Importers of yachts
	Importers of (rubber) boats

Yacht construction	
	Hull constructors
	Yacht wharf (new construction)
	Canoe construction/multi-hull construction

Yacht Basins & Moorings	
	Harbours
	Restaurants/campsites
	Moorings/Boat sheds
	Indoor winter moorings on the quay
	Outdoor winter moorings on the quay

Brokers (HQYB)	
	Brokers/negotiators

Yacht services	
	Yacht painters
	Yacht wharves (repairs)
	Technical fitters/advisors
	Carpentry/carpenter's wharves/interior furnishing

Suppliers	
	Importers/manufacturers of accessories
	Importers/diving and fishing material manufacturers
	Importers/ electronics manufacturers
	Importers/ clothing & footwear manufacturers
	Importers/ surf and ski material manufacturers
	Importers/ coating/varnish/oil manufacturers
	General yacht construction suppliers
	Yacht basin supplier
	General water sports supplier/service provider
	Ship transport/trailer builders (rental companies)
	Other services

Rental of Pleasure Craft	
	Rental (with crew)/traditional rental
	Rental (without crew)
	Rental negotiations domestic and foreign

Sailing and Navigation Instruction	
	General training programmes and schools
	Sailing and navigation instruction

Sail Makers & Riggers & Furnishers	
	Ship furnishings
	Rigging
	Sail makers, etc.
	Sail cleaners

5.1. ARCHITECTS/DESIGNERS

Yacht architects are the first link in the production process of ships. They are usually commissioned by private parties for both motorised yachts and sailing yachts made from diverse materials. In some cases the yacht architects remain involved in the production process of the ships they have designed.

In addition to designing beautiful, smooth-sailing and reliable yachts, architects sometimes also provide the woodcutting package, project management or construction supervision (on location or worldwide). These architect offices are often a full-service office.

Average surface area	*200 m2*	
Number of staff per company	*2.4*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*2.3*	*Source: ECORYS 'The Water Sports Industry 2004'*
Company may be on first storey	*Yes*	
Company may share (office) building	*Yes*	

5.2. DEALERS & RETAIL TRADE

HISWA Association bundles the interests of Dutch entrepreneurs in the professional area of Water Recreation. Among those belonging to this professional area are companies whose main or secondary activity involves the retail trade in water sports articles and/or boats. HISWA Association has a total of 1,050 members. Of these, 370 belong to the 'Trade' group, whose main activity is the sale of water sports articles. However, this group is very diverse and includes all sorts of companies, such as yacht basins with a retail trade, storage companies for boats that have a retail trade, repair and maintenance companies with a retail trade, specialised water sports shops, etc. The HISWA Association's aim is to strengthen the services to the retail trade in water sports activities and to represent their interests. One of the obstacles in this aim is the lack of economic data about the water sport retail trade.

	Main activity	*Secondary activity*
Number of companies in Holland	*370*	*280*
Total turnover water sport s articles (x million €)	*213*	*36*
Total employment	*1.210*	*620*

About 1,830 people are employed in this branch. As is customary in the retail trade, a considerable number of its jobs are part-time. For a full-time job in the water sports retail trade, about 1.3 persons are needed (the per annum ratio = 1.3).

The average company staff is 2.8 working persons. In more than 65% of the companies, there are two or fewer persons employed, including the owner/director. The average company staff in the water sports retail trade is 3.5 working persons. In companies in which the water sports retail trade is a secondary function, an average of about 2 persons are involved in the sale of water sports articles.
Companies in this branch are sometimes affected by the seasons. A quiet winter is compensated for in the summer.

There are various standards for calculating productivity. In the retail trade, it is customary to look at the *turnover per full-time equivalent (FTE). Another index number used in the retail trade to measure productivity is the turnover per square metre of covered floor surface.*

The average turnover per FTE in the water sports retail trade is about €179,000. In the specialised water sports retail trade, the turnover per FTE is on average €233,000 annually. The turnover per FTE in companies where water sports articles are not the main activity is considerably lower at €78,000. Working in a cooperative association, belonging to a branch organisation and the location of the shop have no evident influence on the turnover per FTE. In this branch the average turnover per square metre of covered floor space is about €1,730. Strikingly, there is no significant difference in the sales per square metre of covered floor space between companies that sell water sports articles as their main activity and companies that do so as a secondary activity.

Companies located at the waterside sell more accessories (27% of the turnover), rope (10% of the turnover) and paint (10% of the turnover) than companies without a waterside location. This can be explained by the location itself. People often do not realise something they need is lacking until they're on board their boats. In those cases, they go off (by boat) to look for a special shop. They often need rope and accessories. The category of companies that collaborate on sales and/or purchases does not focus on the sale of extra boats and engines.

Two-thirds of the water sports retail trade is a one-man business!
The retail trade is often a secondary activity
The category of trade is divided into wholesale and retail.

KEY POINTS

- *The water sports retail trade consists of 650 companies; of these, 370 have the sale of water sports articles as their main activity.*
- *The turnover in the water sports retail trade is about €250 million, divided into main activity €213 million and secondary activity €36 million.*
- *About 1,830 people are in employment, 560 of whom are self-employed.*
- *Two-thirds of the water sports retail trade is a one-man business.*
- *More than half of the turnover consists of the sale of extra boats, engines and water sports accessories.*
- *The most important channel of purchase for the water sports retail trade is the domestic wholesale trade in water sports articles. The retailers buy more than 70% of their purchases via this channel.*
- *The average gross margin (= turnover – purchases) is 27% of the value of the turnover (excl. VAT).*
- *About 9 of the 10 companies actively promote/recruit. Most of them use several promotion/recruiting channels, such as websites and advertisements in national and regional newspapers. Word of mouth was mentioned by more than 40% of the companies.*
- *The HISWA collective bargaining agreement is used by 37% of the companies with a collective bargaining agreement. This amounts to 92 companies.*
- *In companies where water sports articles form the main activity, the turnover has increased by 8% in the past 3 years. In companies where water sports articles form the secondary activity, the turnover has increased by an average of 2% in the past three years.*
- *There are problems in the areas of economic development and laws and regulations.*
- *Smaller companies expect problems because of a scaling-up within the branch.*
- *A number of companies expect problems if private individuals begin to buy directly from the wholesaler (internet).*

Average surface area	*Depending on the assortment.*	
Number of staff per company	*3.4*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*3*	*Source: ECORYS 'The Water Sports Industry 2004'*
Company may be on first storey	*Yes*	
Company may share (office) building	*Yes*	
At waterside	*Preferable, turnover higher at waterside than elsewhere*	
Parking space(s)	*Yes, good road infrastructure is necessary*	
Toilets for visitors	*Yes*	

5.3. APPRAISERS

HISWA Association has a total of 35 companies that carry out appraisals. Of these, 14 have appraisal work as their main activity.

Because sailing is a personal way of spending leisure time, there is a wide diversity of recreational boats. Each captain has his or her own idea about the ideal ship and has his or her own specific wishes. The market offers a wide choice of boats in various price categories. The difference in price categories is related not only to the different types of boats but also to differences in prevailing models, accessories and maintenance. Even the most experienced water sports enthusiast finds it difficult to gather sound knowledge about all of the details of boats.

Pleasure craft appraisers can carry out diverse, objective studies about the technical condition of a boat. There are any number of situations in which using a pleasure craft appraiser is not only wise but also necessary.

Once the boat has been inspected, the client will get an oral report. If the condition of the boat is appraised, the appraiser usually provides a written report on the spot. In other cases, the report is sent during the course of the following week. The person who pays for the appraisal is the owner of the report. The content of the report is discussed only with this person.

Average surface area	*100 m2*	
Number of staff per company	*1.5*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*1*	*Source: ECORYS 'The Water Sports Industry 2004'*
Company may be on first storey	*Yes*	
Company may share (office) building	*Yes*	

Most of the appraisers affiliated with HISWA are a one-man business. They carry out purchase/sales inspections, appraisals, construction supervision, counter-appraisals, refits, new construction and trial journeys/sea trials. Since they often work outdoors (on location), most of them have an office at home.

There are also many yacht basins and other water sports companies with an appraiser as a secondary activity.

5.4. IMPORTERS OF ENGINES

HISWA Association has a total of 45 companies that claim to import engines for pleasure craft. Of these, 19 have this activity as their main activity.

Average surface area	*Depending on the assortment, for example (smaller) outboard motors or (larger) inboard motors.*	
Average number of staff	*2.1*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*1.8*	*Source: ECORYS 'The Water Sports Industry 2004'*
Company may be on first storey	*No*	
Company may share (office) building	*Yes*	
Waterside location	*No*	

Because the transport of large and/or heavy engines a good road infrastructure is necessary.
Surface area at quayside is office, showroom and storage.

5.5. IMPORTERS OF PLEASURE CRAFT

HISWA Association has a total of 182 companies who claim to import pleasure crafts, of which a total of 80 denote this as their main activity.

This group of traders consists of companies that import and sell (shipyard-built) boats. Additionally, importers will often deal in used yachts (trade-ins). Smaller boats (such as dinghies, fishing vessels and sloops) are often kept in a showroom or warehouse. Larger vessels (such as sailing yachts and motor boats) are often in a private marina or in rented moorings within yacht basins.

Average surface area	*Depending on the assortment and type of craft.*	
Average number of staff	*1.4*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*1.1*	*Source: ECORYS 'The Water Sports Industry 2004'*
Company permitted on 1st floor	*Yes (small boats only)*	
Company may share (office) building	*Yes*	
Waterside location → small boats	*Possible*	
Waterside location → large boats	*Yes*	

There is a clear distinction between importers of yachts and importers of (rubber) boats. The first group is often located alongside water, while the second does not require a proximity to water as the boats are easily transported by road (either in a car or on its roof, or on a trailer).

5.6. YACHT CONSTRUCTION

The Dutch yacht-building industry is innovative and maintains a solid export position. This is attributable to a positive quality and dependable image, and through a long history of collaboration in the field of export promotion. The Netherlands has managed to forge a leading international reputation through this particular 'Holland branding'.

Dutch boatyards are market leaders in (semi-) customised building. Their reputation for quality precedes the Dutch boat builders, with aspects such as solid engineering and system design in particular ensuring that The Netherlands remains a leading force. The Italians admittedly are masters of design, but the Dutch take great lengths to make sure that, in addition to a boat's appealing blueprint, all of its other associated aspects are compatible and cohesive.[1]
A shipyard or wharf is a site where ships or other floating vessels are constructed or repaired. There is a distinction within yacht construction between vessels with a length of less than 24 metres, and those over 24 metres in length. Incorporated within the definition of yacht construction of boats in excess of 24 metres long, is the top end of yacht construction: the so-called luxury mega yachts.

[1] *Source: Think Yachts. Think Holland (HISWA Association, November 2010)*

Incorporated within the category of yacht construction of vessels shorter than 24 metres is both the construction of these vessels and the activities associated with this sector, such as maintenance and repair. There is a large diversity according to type, dimension and material. Finally, there is a distinction according to manufacturing methods:

Standard construction: boats are manufactured according to basic construction.

Semi-custom-built: the starting point is the standard construction of the hull, but minor modifications are possible.

Custom-built: design and completion are carried out entirely in accordance with client specifications.

Many yacht builders carry out other activities in addition to construction, such as importing certain boats or providing storage.

The HISWA Association has a total of 550 companies who carry out boatyard activities, of which the boatyard is the main activity for 330 of these companies. Of the total of 450 yacht boatyards in The Netherlands, no less than 90% are a member of the HISWA Association.

A boatyard has to comply with approximately fifteen laws and thirty regulations.

Average surface area	*Depending on the maximum size of the yacht.*	
Average height of building / doors	*Depending on the maximum size of the yacht.*	
Average number of staff	*6.5*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*6*	*Source: ECORYS 'The Water Sports Industry 2004'*
Company permitted on 1st floor	*Yes (small boats only)*	
Company may share (office) building	*Yes*	
Waterside location → small boats	*Preferably*	
Waterside location → large boats	*Yes*	
Environmental features	*Yes*	

In Holland there is a lot of water available and most water sports companies are located along the waterside. However some are located in inland industrial parks because the premises is cheaper or the location is more convenient for bringing in materials or transporting finished boats.

5.7. YACHT BASINS (MARINAS) & MOORINGS (BERTHS)

HISWA Association has a total of 550 companies that operate moorage and storage facilities, of which 280 operate a yacht basin as their main activity. Of all of the six hundred commercial yacht basins in The Netherlands, no less than ninety percent are a member of the HISWA Association. This renders the HISWA yacht basin sector the largest of the thirteen groups within its trade sector total. A yacht basin has to adhere to 45 laws and regulations.

The Netherlands has approximately 1600 'yacht basin addresses'. According to data from the CBS (Central Statistical Bureau) 74% of yacht basins have less than 200 moorings.

Statistics from CBS also reveal that the number of large yacht basins (> 500 moorings) has increased by 22% in recent years, and that the number of small yacht basins (< 200 moorings) has decreased by 5%.

According to a spokesperson for the HISWA Association, approximately 52% (832 yacht basins) of all yacht basins are commercial outfits, and approximately 48% (768 yacht basins) are a non-profit organisation. The non-profit harbours can be divided into in association harbours (70%), municipal harbours (20%), harbour foundations (7%) and government/provincial harbours (3%).
The fact that there are so many non-profit harbours is a reflection of the incredible popularity of water sports in The Netherlands, which is supported and profiled by countless volunteers. Due to the large number of non-profit harbours, it can also be stated that there is a case for unfair competition within the yacht basin sector. Non-profit harbours (often) have no employees on their books due to the many volunteers available to them, whereby they have no staff overheads to consider, and therefore do not have any VAT obligations. In addition, a non-profit harbour does not have to pay corporation tax because they are not considered to be a business. The result of these 'advantages' is that mooring rates are 40% lower than those of commercial harbours.

Rates
In the UK on British Waterway waterways, most marinas are privately-owned and charge commercial rates. Some moorings are owned by boat clubs. These are on a membership basis, so they don't compete with the private sector. Others are owned by British Waterways mainly through our marina subsidiary British Waterways Marinas Ltd. British Waterways has an agreement with the industry that this subsidiary will operate on a commercial basis with no cross-subsidy from British Waterways.

A key distinction for us is between what we call permanent moorings (where people base their boat) and visitor moorings (for visiting boats). Normally the latter are provided publicly by ourselves and there is no charge for using them (it's covered in the licence fee). However some marinas may also provide berths for visiting boats and may charge a modest sum for this – it allows boaters to use the facilities in the marina. It might be worth saying something about this distinction between permanent berths and berths for visiting boats.

The size of a yacht basin depends on the number of moorings (width, depth and length) and the number of additional activities. Supplemental to the main activity (mooring rental) it is often particularly lucrative to offer additional services, such as food and drink facilities, repairs, winter storage, ship chandlery, and the sale of fuel.

In order to determine whether a yacht basin will also offer additional activities, it is significant for there to be a certain depth of knowledge of the area concerned (transit zone, holiday area etc.) In a transit zone for instance, winter storage is not very viable, while providing a sale outlet for fuel would on the other hand generate a profit. In addition to the area, the entrepreneur should also take the boat inventory into account: if the boat inventory mainly consists of motorboats, it would not be profitable to offer a sail repair service.

Conclusion regarding yacht basin size

The conclusion of the aforementioned is that well-considered planning should take place prior to the establishing of any yacht basin. This includes an in-depth look at the need for moorings (both in number and in category of size), the correct amenity level and the pace of realisation.

A yacht basin is an assembly point for amenities, products and services. Parking spaces, waste containers, water taps, sanitary facilities, children's play areas, as well as food and drink facilities, working areas and office buildings make up the landscape of a harbour. For 21 such amenities in Harbours à la Carte, a categorisation has been made, dividing them into 'necessary', 'desirable' or 'impossible'. It must be noted that a yacht basin may consist of a combination of typologies, which will thereby render a cumulation of services.

The category yacht basins comprises commercial, association and governmental harbours (many

of which are marinas). The core activity of most harbours is summer mooring rentals. There are also a number of specialised marinas. Many of the yacht basins have various sidelines such as the rental of winter moorings, ship trading and ship chandlers, providing repair and maintenance work, the rental of motor boats and sailing boats, the rental of surfboards, canoes and rowing boats, the rental of pitches (at camp sites) or accommodation (in bungalows) and sailing, boating or surfing lessons.

Average surface area	*Depending on the location. Basins along inland waterways are usually smaller then basins along open waters.*	
Average number of staff	*1.9*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*1.3*	*Source: ECORYS 'The Water Sports Industry 2004'*
Waterside location	*Yes*	
Company permitted on 1st floor	*Yes, meaning offices or sanitary amenities*	
Company may share (office) building	*Yes*	
Guest area/reception	*Yes*	
Environmental features	*Yes*	

Marinas Create Economic and Community Values They attract boater spending within and outside the marina sector. They encourage and support the sale of boats and accessories. They support and encourage coastal tourism and related economic development -retail, lodging, and restaurant. They can help preserve visual access to the water –blue spaces. They can provide the public physical access to water. They can contribute to sustaining and enhancing community aesthetics and liveability of communities.[2]

[2] *Measurement Instruments for the Economic Benefits of Marinas (Dr. Ed Mahoney, 2008)*

Storage Company

Increasingly, harbours are being realised in central urban areas as part of a new and alluring feature of the municipal structure. In doing so, only the 'attractive' properties of the water sports are incorporated, and the harbour is reduced to a floating parking lot for boats. Storage on the quay is not desirable in such surroundings.

This type of usage creates a need for storage space for boats in the winter period. This concerns paved or semi-paved terrain, at the waterside, whereby a boat hoist and/or slipway is necessary for taking boats in and out. The grounds are fenced off, and sometimes provide space for service companies, and require live-in personnel on site or permanent security. Environmental facilities are needed for the prevention of soil contamination and polluted surface water. There is a great need for the indoor storage of boats. In the event that this need can be met (with large sheds of a clearance height measuring 8 metres), then this would be a particularly positive addition. Within the grounds, maintenance is carried out on a small scale by owners and service companies.

Area configuration: 60 to 80 boats per hectare.
Location option: in residential surroundings, at a maximum of 30 km from mooring.

5.8. BROKERS

The HISWA Association has a total of 65 companies that are in the brokering business, of which 21 have yacht brokering as their main activity. A yacht broker is a middleman between the buyer and seller of a yacht (for instance a sailing or motor boat). Brokers sometimes have a private harbour for a sales area (such as the Valk Yacht Brokerage in Loosdrecht) but in some instances, they will rent a number of moorings or a so-called sales jetty within a commercial yacht basin. There are also brokers with a few pre-owned boats in a boat shed or otherwise depicted on a website.

There is a difference between a broker with own mooring facilities and brokers using the internet.Brokers may sometimes have:
- Their own harbour with sales area
- Pre-owned boats in rented moorings within a yacht basin
- Pre-owned boats on the internet/website (with mooring elsewhere/at owner site)
- Pre-owned boats on the quayside

The yacht broker receives a commission: a portion of the sale value calculated as a percentage for facilitating the sale agreement between the buyer and vendor.

Average surface area	*Less, due to internet sales. Depends if the brokers has own mooring facilities for the occasions or is just using the internet*	
Average number of staff	*3.7*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE	*2.9*	*Source: ECORYS 'The Water Sports Industry 2004'*
Waterside location	*Yes → own moorings /sales harbour*	
Waterside location	*No → via internet or boat seller with a mooring elsewhere*	
Company permitted on 1st floor	*Yes, meaning offices*	
Company may share (office) building	*Yes*	
Guest area/reception	*Yes*	

5.9. YACHT SERVICES

The HISWA Association has a total of 550 companies that carry out wharf activities, of which the main activity for 350 of these companies is yacht servicing. Of all of the 450 yacht servicing companies in The Netherlands, ninety percent is a member of the HISWA Association. Yacht servicing companies have approximately 15 laws and 30 regulations to adhere to in The Netherlands.

This sector consists of specialised companies that carry out repair and maintenance works to vessels and other sectors, such as yacht basins and sail makers, who also provide repairs (as an additional activity). Examples of works are:

- *Renovation of hulls*
- *Engine repair and maintenance.*
- *The fitting of gas installations.*
- *The fitting of accessories, etc.*

Average surface area *Normally it would depend on the size of the yacht (like yacht builders) but nowadays yacht service companies are often 'mobile' yacht service companies using a small van or truck.*

Average number of staff	*6.2*	*Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*4.8*	*Source: ECORYS 'The Water Sports Industry 2004'*
Waterside location	*Yes*	
Company permitted on 1st floor	*Yes, meaning offices (not the work area)*	
Company may share (office) building	*Yes*	
Guest area/reception	*Yes*	
Environmental features	*Yes*	

5.10. SUPPLIERS

The HISWA Association has a total of 450 companies who claim to be suppliers, of which 131 have indicated that this is their main activity. Examples are Importers / manufacturers of accessories and electronics, clothing and footwear, coatings, varnish and oil, yacht construction or harbour suppliers and ship transport.

Average surface area	*Depends on the goods that are being sold.*
Average number and FTE of staff	*Depends on the goods that are being sold.*
Waterside location	*No, adequate road infrastructure is necessary*
Company permitted on 1st floor	*Yes*
Company may share (office) building	*Yes*
Guest area/reception	*Yes*

5.11. PLEASURE CRAFT RENTAL

The HISWA Association has a total of 180 companies that rent out yachts and open boats, with or without crew or a boatmaster, of which ninety do this as their main activity.

The main activity of a rental company is the rental of boats or yachts. Often the rental proprietor has a number of moorings in a privately owned harbour or along the quayside. Sometimes the rental proprietor will rent moorings in a yacht basin, using the same practice as brokers.

Of all of the 110 professional yacht and boat rental proprietors in The Netherlands, no less than eighty percent is a member of the HISWA Association.

Average surface area	*Depends on the size of the boats that are being led and the size of the fleet*
Average number of staff	*1.9 Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*0.9 Source: ECORYS 'The Water Sports Industry 2004'*
Waterside location	*Yes (no water location required for rental brokering)*
Company permitted on 1st floor	*Yes, meaning offices (not the work area)*
Company may share (office) building	*Yes*
Guest area/reception	*Yes*
Parking spaces	*Yes*

Photo: Yacht rental company Enjoy Sailing in Lemmer (the Netherlands)

5.12. SAILING AND NAVIGATION INSTRUCTION

Of all of the seventy professional sailing training centres in The Netherlands, no less than sixty percent is a member of the HISWA Association. Members of the HISWA Association who provide sailing and navigation training as their main activity are obliged to join the CWO: the Commission of Water Sports Training, which certifies participants according to training quality and facilities. The HISWA Association has a total of forty companies that offer sailing and navigation training, of which thirty do this as their main activity. It is an active sector group with its own management board. The chairman of this board represents the sailing and navigation training in the national Association Board. In The Netherlands, the CWO distinguishes between the following categories:

- *Keelboat*
- *Youth sailing*
- *Dinghy sailing*
- *Windsurfing*
- *Catamaran sailing*
- *Motor boating*
- *Cabin yacht sailing*
- *Sea sailing as most categories are on inland waters*
- *Outboard engine*
- *Rowing*
- *Large motor vessel*

There is a distinction between operators offering practical and theoretical lessons. Sailing and navigation training centres offering practical courses/training often have a waterside location. In addition to an office, they often have a number of moorings for their own fleet, or rent these from a (nearby) harbour. Course students have accommodation on the premises (full board) or are taught per (half-) day. Most of the training centres that offer fully-fledged courses often have special (group) accommodation along the water. In The Netherlands for instance this is often a renovated farmhouse.

Those offering theoretical courses or training (boatmaster certificate) sometimes have their own location or rent one if sufficient applicants have subscribed.

Average surface area	*Depending on the size of the fleet and if students stay overnight*
Average number of staff	*12.4 Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*3.4 Source: ECORYS 'The Water Sports Industry 2004'*
Waterside location	*Yes*
Company permitted on 1st floor	*Yes, meaning offices (not the work area)*
Company may share (office) building	*Yes*
Guest area/reception	*Yes*
Parking spaces	*Yes*

The addendum 'FTE' after Sailing and Navigation Instruction refers to the number of permanent employees, whereby instructors are not included. Large commercial sailing schools can sometimes have in excess of 100 instructors on their books, who are regularly enlisted to teach for a week or weekend. The average number of course days taught per year is around seven.

5.13. SAIL MAKERS & RIGGERS & FURNISHERS

The HISWA Association has a total of 45 companies carrying out activities such as ship furnishings, rigging, sail making or sail cleaning. There are many different types of sail makers. In addition to sails, they often make tents, tarpaulins, cowls and/or spray hoods. There are an increasing number of sail makers who have their sails manufactured abroad.

Average surface area *Depends on the size of the sails. A sail maker specialized in small dinghy sails needs less space than a sail maker for large (regatta) sailing yachts which often use a mold for making the sails. Sail makers specialized in covers or spray hoods can be smaller in size.*

Average number of staff	*1 Source: ECORYS 'The Water Sports Industry 2004'*
Average number of FTE staff	*0.9 Source: ECORYS 'The Water Sports Industry 2004'*
Waterside location	*No (riggers and sail makers would prefer that however)*
Company permitted on 1st floor	*Yes*
Company may share (office) building	*Yes*
Guest area/reception	*Yes*
Parking spaces	*Yes*

Riggers

The proper rigging of a yacht is not a job for a couple of spare hours. Many sailors and yacht builders have come to appreciate that this work is something to be handled by specialists, and it is the reason for a growing number of sailors and boatyards to use so-called riggers. Riggers often have storage space at home or at a yacht basin /boatyard close to the client, in addition to a van. Besides the standing (rigging) and running (halyards) rigging, riggers often provide the remaining lines and deck hardware and/or masts and outrigger booms.

Furnishers

Furnishers are specialised in supplying boat cushion or boat seats (re-upholstered, shaped, with or without popliteal augmentation, saddle or flat seated, possibly with edging or buttons) but they also often supply special (tailor-made) slats.

Sail cleaners

Sail cleaners are specialised in the cleaning of sails or spray hoods.

6. WATER SPORTS COMPANIES AND REGULATIONS

6.1. LAWS AND REGULATIONS

In addition to local factors, there are also a large number of legal obligations that can be of influence with regard to setting up a business. Environmental regulations in particular can have a significant influence in this respect, but so can matters such as nature legislation.

These legal restrictions have not been incorporated in this report however for the following reasons:

The regulations vary significantly per region and per nation.

Regulation is extremely dynamic and therefore continuously subject to change.

In addition, they are not relevant for initially determining whether a company can establish itself in a certain location. In order to determine the targets of a zoning plan, the initial phase is to look at the possibilities of the designated area. Subsequently, the various interests concerned are considered.

If for instance a certain area is designated as a nature reserve, then no business will be permitted within that zone. There has to be consideration however in instances whereby areas that differ in their designation are adjacent to one another, such as areas designated as residential, of natural interest, or industrial areas, which can in some instances be a source of hazard.

If an area displays favourable environmental factors for establishing a water sports company, then the less favourable factors can be considered.

In addition, it should of course be possible for a company to be able to obtain the necessary permits in the vicinity; this however will require enlisting an expert.

7. SUGGESTIONS FOR USEFULL COMBINATIONS

In principle all types of companies mentioned in this handbook can be combined. However, in the development of a site, there are a number of preconditions:

Location

The location itself obviously cannot be used for all purposes. Account should be taken of the number of m2 of land and existing buildings. Space available should be sufficient for the needs of the business.

In the re-use of old industrial areas there sometimes is a historic interest which must be taken into account. In this case, key historic characteristics of the location should be maintained, and if necessary renovated or restored. But other, less important buildings and features can be demolished or removed. Of course possible historic building legislation has to be taken into account as well.

A sail maker for example requires a relatively large space to be able to make the sails. A large hall is necessary. In the forming of combinations, the location itself is the limiting factor.

Environment

But of course the design of a site depends not only on the available land and buildings. Developing a site is more complicated than that. When setting up a site is important to take environmental factors into account.

The first assumption is the official land use zoning plan. In this plan the guidelines from the government or local authority that must be met are set out. Attention should be paid as to whether certain enterprises must be located in specific zones and if not whether a zoning change can be made. It is not always possible for all types of businesses to establish at a particular location because for example the location is adjacent to a sensitive residential area. For example noise complaints often arise from residents who live close to a shipyard.

Secondly, it is important to check what already happens in the vicinity of facilities. It makes no sense to start the same business or to offer the same service within close proximity of another if there is not enough supply. Of course not all companies are sensitive to this. For example in the Netherlands there are more Yacht service and maintenance companies than sail makers.

Thirdly, it is important to know what the target market groups are. How many potential customers there are present in the area and what they would like to use or need? Also a step further can be taken so an entirely new audience is attracted to the area from outside. A new dimension also can be added through innovative and new products.

Conclusion. In principle, all combinations of activity which are mentioned in this book are possible. But for a business to be successful, it is essential to take into account the limiting factors and opportunities.

8. DEFINITIONS

Canal
An artificially constructed waterway.

CE-conformity marking
The markings on a pleasure craft, part of a pleasure craft, or a propulsion engine, indicating by the affixing thereof that it is compliant with all obligations as defined in the rules governing the use of the applicable harmonisation directives;

Dry berthing
- Shore-side, in a parking lot, dinghy park, dinghy jetty etcetera;
- Shore-side, in boat sheds.

Jetty
A jetty is a construction in the water/in a harbour for mooring a boat.

Marina
Marinas are considered to fall within the category of yacht basin, but all those (temporary or otherwise) selections of mooring spaces in recreational areas or other locations where mooring is only permitted for several days (such as the Marrekrite in Friesland for instance), are not deemed to be a yacht basin.

Mobile water recreation
Water recreation whereby vessels are used, such as: sailing, tour boating, jet skiing, rowing, canoeing and windsurfing.

Mooring
A special space that is occupied by so-called permanent mooring holders who have been allocated a mooring through their membership (via a winter, summer, or annual contract). Moorings are usually located in a yacht basin or a water sports-related company renting mooring spaces. A mooring near private (holiday) accommodation is also a possibility. There are basically five options for accommodating boats in yacht basins during the boating season:

Non-mobile water recreation
Examples are sunbathing and swimming in open water, diving and angling.

Pleasure craft
Any craft not used for business purposes.
Vessel designed for sports or recreational activities, possessing a hull length of at least 2.5 metres up to a maximum of 24 metres (Source: Wet Pleasure Crafts).

Providers of (permanent) moorings
Water sports companies whose main activity is 'mooring rentals' are usually yacht basins, often with related supporting (water sports) activities such as maintenance, repairs and winter storage.

River
A relatively natural stream of water. Every river is located within a catchment area: this is the total surrounding area within which all of the superfluous water is discharged via that single river.

Temporary berth
A special space that is taken up temporarily (often up to a maximum of 3 x 24 hours) by a pleasure craft.

Water sports company
In addition to yacht basins, there is a wide variety of water sports companies that carry out another main activity besides operating a yacht basin, such as a boatyard, sailing school/recreational accommodation, boat rental, brokerage business, and so on. Incidentally, there are quite often (a few) moorings available in these situations.

The diversity of water sports companies demands – within the confines of the maximum available surface area - a location-specific approach when considering building regulations. There should be enough space allotted to be able to deal with the requirements of entrepreneurs to realise certain amendments or changes to these facilities within certain perimeters. The development will be linked to a construction block if satisfactory spatial planning so requires.

The spatial integration of a water sports company is primarily the responsibility of the entrepreneur. It is however a shared responsibility with the municipality concerned, and must, if necessary (through signed agreements or terms and conditions in the event of planning exemptions) be enforced through individual land owners. There can however no generally applicable rulings regarding spatial integration, as each instance requires a location-specific approach.

Water recreation
The various types of open-air recreation predominantly aimed at the utilisation of water.
Water recreation encompasses a wide variety of water-related activities, which are on offer at water sports companies in some capacity.

Water sports companies - including yacht basins in some instances - opt for expanding their food and drink operations in order to attract groups outside of water sports enthusiasts (via parties and events, day packages, facilitating meetings, training sessions etc.). It is advisable, when augmenting water sports activities with these additional enterprises, to distinguish between:
- A water sports company with auxiliary food and drink facilities; i.e. for guests of the company;
- A water sports company with separate independent catering, i.e. an outfit that is also oriented towards attracting guests from outside, as well as catering for those within the enterprise. This distinction should be expressed within the zoning plan.

Water sports enthusiast
A water sports enthusiast is someone who partakes in water sports.

Water sports
Water recreation whereby a pleasure craft is used.

Wet berthing
- In the water and uncovered;
- In the water and covered over (boathouse);
- In the water attached to anchor buoy/mooring.

Yacht basin
The term 'yacht basin' is derived from the ruling governing open-air recreation, and is defined as a 'harbour with connected grounds whereby the predominant designated use is for the berthing, mooring, or keeping moored vessels within the pleasure craft category'. The main activity is the rental of moorings, but often

there are other related secondary (water sports-related) services available such as maintenance, repairs, water sports stores, food and drink, and winter storage.

The definition of the Yacht Basin Ruling is that a yacht basin is a site having at least 10 moorings for pleasure crafts.

Often the total water surface area is denoted in the formation of the planning zone. Within that surface area, it is at the discretion of the (yacht basin) entrepreneur to determine how many and what type of moorings can be incorporated. The type of sailing area the basin is located in is a deciding factor in this regard.

Yacht basins rent out moorings for pleasure crafts. There are three yacht basin types, namely: commercial harbours, association harbours and municipal harbours. Over three-quarters of harbours also generate income from related services, such as repairs and boat maintenance, yacht rental, yacht brokerage, and providing (covered) winter storage, camping facilities and food and drink services.

9. LITERATURE

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'Water Sports Industry in 2004, Trends and Figures, November 2005, Onderzoeksbureau ECORYS in association with the HISWA Association.

'View of Water Sports Retailing 2003', Hoofdbedrijfschap Detailhandel

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