SOCIO-ECONOMIC IMPACTS

JOINT MANAGEMENT TEAM

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SUMMARY

The second Interreg project concerning Marinas and Yachting in the Irish Sea and Lower North Sea, known as MAYA 2, chose to create joint project management teams (JMT's) to facilitate the transfer of knowledge between partners. One of these JMT's had as its theme 'Socio-economic impacts of the MAYA 2 investments'.

The subsequent growth in maritime activities as a result of marine investment leads to economic benefit both locally and regionally. It is important to monitor these effects. This report starts with an overview of existing research regarding the socio-economic value of the marine leisure industry in each of the larger MAYA 2 investment areas.

In the chapter 'Investments and their Surrounding Areas' we explain a little about each of the partners and their investments, including some information about the areas surrounding the investments.

It is important to try and use indicators that wherever possible measure the effects of the actual *investments* and not changes that could be due to other influences, although this is often not easy as many factors influence the use of marine facilities, e.g. the weather, time of year, events happening in the area. Visitor satisfaction surveys can be a useful tool and therefore the JMT constructed a generic questionnaire using questions from survey forms already in use. This was then adapted by each partner to suit their investments and used where applicable to collect data.

As the types of investments differ so much from one project partner to another, it was decided, after much discussion, that a 'joint model' in the classical sense of the term is not possible in this case, but that a 'joint methodology' should be used instead. To do this each partner has selected relevant indicators from a common list (see appendix 1) and applied them to their particular investments.

In the chapter 'Findings' the results are described, originating from the information gathered. This information is obviously not directly comparable between partners or investments; therefore each investment will be treated as a separate case study for the purposes of this report.

Due to the installation of some investments later in the project, it was not possible to collect data for all investments in time for reporting in this document. In these cases baseline data has been collected and predictions have been made where possible. It is planned that data will be collected in the future where possible and the socio-economic effects monitored.

In the 'Conclusions' section we sum up the findings of the research. The increase in quantity has been gathered from collecting numbers of, mostly, visitors and boats. The quality of the facilities is mostly measured by visitor surveys. Not every partner has yet accumulated figures that show an increase in the quantity or quality of the marina and/or berthing due to the timescales of the MAYA 2 project, but it is planned that this could be done in the future where possible.

INTRODUCTION

The MAYA 2 project aims to promote transnational co-operation between ports in the Lower North Sea and Irish Sea Regions. The project has partners in several European countries including France, The Netherlands, Belgium, the UK and Ireland. The aim of the project is to get boats moving and improve maritime links between harbours in each partner area.

Whilst some partners in the MAYA 2 project are carrying out studies, several partners are making capital investments in their maritime infrastructure, installing structures ranging from a single pontoon to a whole new marina complex. When capital investments such as these are made, the subsequent growth in maritime activity leads to economic benefit both locally and regionally. It is important to monitor these effects as they reflect, to a certain extent, the overall impact of the MAYA 2 project investments.

This report starts with an overview of existing research regarding the socio-economic value of the marine leisure industry in each of the MAYA 2 investment areas. It then goes on to explain a little about each of the partners and their investments, including some information about the areas surrounding the investments. It then goes on to explain the methodology used to collect data and the reasons behind this. The next section examines the information gathered. This information is obviously not directly comparable between partners or investments; therefore each investment will be treated as a separate case study for the purposes of this report. Conclusions are then drawn and, where required, observations are noted.

BACKGROUND

Most of the participating countries measure the social and economic use and benefits of water sports in their country, although in many cases research in this area is relatively new and little is available. In this chapter is an overview of some of the statistics available for each country. This is obviously not exhaustive; rather it gives an idea of the value of the industry in each country.

United Kingdom

At the London Boat Show in January 2006 the British Marine Federation (BMF) published a new study examining the economic benefits of the UK leisure boating industry. This is the first time a study such as this has been undertaken in the UK and the information presented highlights the great importance of the boating industry to the wider tourism industry in the UK.

The economic benefit of the leisure boating industry in the UK amounted to approx £700 million in 2003, with the marina, moorings and boatyard services sector the second largest sector accounting for around 15% of this benefit, (BMF, 2006).

The marina, moorings and boatyard services sector contributes approx. £113 million of value added to the national economy, with approx 3,500 people employed in 1,000 businesses, (BMF, 2006).

The report also estimates that there are approximately 450,000 - 500,000 boats in the UK, (excluding small boats less than 2.5 metres, canoes and kayaks) and that 6-7% of the adult population participates in leisure boating activities, representing about 4 million people.

The BMF report also found:

- Total tourism activity associated with leisure boating supports up to 68,000 tourism jobs in the UK, of which 10% are supported by expenditure from overseas visitors

- Overseas tourists are estimated to account for about £200 million of the total leisure boating related tourism spending of up to £2.2 billion.

- Approximately 24 million day visits and up to 16 million overnight trips involving leisure boating activities are undertaken each year (BMF, RYA and Sunsail Watersport Participation Survey, 2004)

- The total economic benefit of the marine leisure industry to the UK economy is around 30,000 jobs in up to 5,000 businesses

There appears to be several suggestions as to how much the average boat visitor spends, with data available from The Great Britain Day Visit Survey (GBDVS) and from the Inland Waterways Day Visit Survey (IWDVS). The GBDVS found that the average spend on a leisure day visit to 'water with boats' is £11.40, whilst the average spend for a tourism day visit to 'water with boats' is £25.50. However, this may overstate the total impact of tourism spending as this includes activities such as walking and fishing too, (BMF, 2006).

The IWDVS provides more detail in that they split spending into boats with an engine (£12.13) and boats without an engine (£13.64). This amounts to approx £263 million total spending on day visits.

Taking figures from the BMF/RYA/Sunsail Watersports survey 2003, the BMF report calculates that for overnight trips, based on an average of a two night stay and a spend of £50 per night, spending is approx £1,600 million per annum.

Other organisations have also estimated leisure boating spending, including Tourism SE which found that the average expenditure per visiting party was £239.48 (£211.80 for domestic visitors and £397.09 for overseas visitors). The British Canoe Union Statistics also show that the average canoeist spends approx £35-40 per trip, which includes accommodation, food and fuel.

The report also highlights several issues affecting the UK leisure boating industry, including increases in fuel prices, increasing environmental legislation and restricted supply of moorings for permanent and visiting boats particularly in popular boating areas. This is something that

hopefully MAYA2 has impacted in providing more access points to the water and providing, in particular, new visitor berths and new marinas.

NB Please note for comparison purposes that the figures above are all in GBP sterling.

Ireland

It was estimated in 2003 that marine leisure activity based on Ireland's freshwater and marine resources generates €434 million in expenditure by Irish residents and that approximately 5,100 jobs are supported by this, (Marine Institute, 2004). The survey, carried out by the ERSI, also found that 1.48 million people, representing 49% of the adult population participated in some form of water-based activity during the survey period. Interestingly, a further 10% of the adult population said they would take up some form of marine leisure activity if facilities were better, (Marine Institute, 2004).

The report also found that domestic spending on boating at sea and on inland waterways generated almost €50 million, supporting the equivalent of 661 jobs. Lack of facilities was the most frequently quoted criticism amongst boat enthusiasts, with poor access being the biggest issue amongst those using small craft, (Marine Institute, 2004).

The ESRI survey also found:

- Boating activity accounted for 1.5 million day trips and 148,000 overnight trips during 2003.

- Approximately €23.5 million is spent annually on accommodation, meals and travel in relation to coastal and inland boating activities. This does not include water sports, other boat based water activities such as sea angling or visits to coastal areas. If all of these activities are taken into account, then the total spend is approx €228.7 million.

- The average spend per person on day trips ranged from €52.50 for sailing at sea to €147.80 for boating on inland waterways.

- Taking into account all marine-based leisure activity, the combined total expenditure on day trips is estimated to be €123.9 million,

overnight trips €228.7 million, whilst a further €81 million relates to equipment and supplies, making a total marine leisure expenditure of approximately €433.6 million per annum. 11.4% of this expenditure is attributable to sailing/boating activity, (Marine Institute, 2004).

- Whilst the overall numbers of participants has remained constant, participation in boating/sailing activities has shown a decline in the percentage of the adult population participating, from 5.5% in 1996 to 4.7% in 2003. This is particularly evident in the 16-29 and 50-60 age brackets.

- Lack of facilities was one of the most common complaints of people surveyed, both participants in leisure boating and not, rating much higher than pollution, cost, insufficient information and poor access.

Further breakdowns can be found in the report 'A National Survey of Water-Based Leisure Activities in Ireland 2003'.

The Netherlands

Figures taken from 'Recreational Figures at Hand' from Stichting Recreatie state that the Dutch recreational fleet exists of about 265,000 boats. In 2002, 7 million people stayed overnight on a boat, making up 5% of total inland stays.

The report also found that since 1993 the average sailor became older (average 51) and the average size of boats got bigger. The survey found that motor boaters tended to travel further a field, whilst sailors tended to stay in a set geographical area. They also found that motor boaters took longer trips aboard their boats than sailors.

91% of boaters surveyed were from the Netherlands, but 71% of German sailors berth their boats in Dutch marinas and are the biggest group of foreign sailors in the Netherlands. The survey also found that 33% of all day trips in the Netherlands involved time spent on water recreation activities, but this includes trips to the beach to swim and sunbathe too.

The Dutch Tourist Board also undertakes research into water recreation activity participation. They publish the 'Kerncijfers, toerisme en recreatie' and their 2005 edition shows that 29% of people in the Netherlands aged over 16 sails at least once per year, 19% visit a

waterfront at least once per year, but that 52% do not take part in any water recreation at all.

When considering inland water sport daytrips (including fishing, swimming and sunbathing), the study found that 59,213,000 day trips are made each year in the Netherlands which accounts for 6% of all day trips. It also suggests that the average person spends between €5.90 and €17.70 per day whilst taking part in these activities, with the least being spent on swimming and the most spent on sailing.

The report goes on to state that there are approx 4,100 water sport companies in the Netherlands employing 15,130 people directly and a further 6,020 indirectly. It shows the economic value of the water sport industry to be approx €1.49 billion from directly related businesses with a further €700 million from indirectly related industries. It also suggests that ownership of water recreation equipment is as follows:

Surfboards, rubber boats, fishing and rowing boats – 700,000
Canoes and racing boats – 106,000
Open sail boats – 67,250
Sailing yachts – 72,800
Open motorboats – 56,000
Motor yachts – 84,000

In the report of a study by the Dutch Research Institute for Recreation and Tourism (NRIT) entitled 'Trendrapport, toerisme, recreatie en vrije tijd 2003-2004', it suggests that in 2003 the average spend was €31 per person per holiday on a short domestic boating holiday (down from €41 in 2002) and €180 on a long trip (down from €210 in 2002). For boat holidays abroad, the average spends in 2003 were €179 for a short holiday (down from €237) and €1288 on a long holiday (down from €1437).

THE INVESTMENTS AND THEIR SURROUNDING AREAS

This section explains a little about each of the MAYA 2 investments and the areas surrounding them. It is important to note that each area and location is very different. The investments range in size from a single pontoon on a remote rural estuary to a whole new marina complex.

Breskens

The council of Sluis is an active participant in the MAYA2 project and focuses on the coastal and marina development of the village of Breskens. Breskens is situated in West Zeeuws-Vlaanderen, the southern part of the province of Zeeland. Geographically viewed, Breskens is centrally situated within the Northwest European water districts. The marina has a direct and open connection with the Westerschelde which discharges into the Lower North Sea.

The village of Breskens will undergo a metamorphosis during the next few years. In the past, all activities in the harbour area were focussed on traditional functions such as fishing, ship repair and transnational shipping. Over the past few years the demand for these activities has rapidly declined, causing the loss of 300 jobs and the end of the ferry service from Breskens to Veere. From an economic point of view, these activities have had a negative influence on the village of Breskens. At the same time though, the number of visiting recreational yachtsmen to the Breskens marina has increased. Potentially, Breskens can grow into a sea and sailing area of international standard because of its central positioning with a direct and open connection with the North Sea and the Westerschelde. This is a significant economic impulse for the village and its surroundings. However, adjustments to the harbour area and the rest of the village are required.

The marina needs to be qualitatively as well as quantitatively well-equipped for these developments. Extra attention needs to be paid to matters such as (technical) facilities, security, environmental conservancy, customer-friendliness and the attractive position of the marina. A customer-friendly marina, well-equipped with the required facilities for the recreational yachtsmen has a positive effect on potential visitors. This will stimulate the attraction of Breskens as a gateway in the Lower North Sea. Breskens marina is the first port of call for boats sailing from France, Belgium and Southern England towards the Netherlands. Economically viewed, the marina will profit from these developments but it will have a positive economic and social effect on the rest of the village too.

Wivenhoe

Situated on the Colne Estuary, Wivenhoe is a small rural town in the UK. Wivenhoe is an ideal location for watching the waterfront activities, viewing the river and whiling away summer evenings outside one of the public houses to be found along the rivers edge. It is an ideal location for a visit by boat, whether it is overnight or just for a few hours. The town centre is not far away and a good selection of individual shops can be found here including gift shops, book shops and grocery stores.

Travel to other parts of the district and beyond are possible with a regular bus service to surrounding towns and villages, including buses to Colchester. A few minutes away from the quay is Wivenhoe Station with direct connections to Colchester and London. There are also plenty of other places easily reachable by boat from Wivenhoe, including Brightlingsea, Rowhedge, Mersea Island and the Blackwater Estuary.

Wivenhoe has views across the river and marshes, ideal for birdwatchers or nature lovers. In the summer the town is very popular with visitors who

access Wivenhoe by road, water or via the Wivenhoe - Rowhedge - Fingringhoe Ferry which runs at high tide between the three locations.

Thames Barges often visit Wivenhoe where they can tie up alongside West Quay whilst passengers embark and disembark.

Much of the quay edge in Wivenhoe is privately owned which presents problems for people wishing to tie up alongside the quay for more than an hour or two. At Wivenhoe Sailing Club visitor berths are available, although space was very limited and the existing pontoons were nearing the end of their useful life. The Sailing Club has toilet and shower facilities as well as a clubhouse and bar. As a part of MAYA2, these visitor pontoons have recently been replaced with a much more extensive structure, providing up to 10 berths for visiting boats.

Brightlingsea

Situated on to the Colne Estuary, Brightlingsea is a small rural town in the UK, close to Wivenhoe and Rowhedge. Brightlingsea 'Hard' or waterfront is an ideal location for watching water based activities and viewing the estuary. It is also an ideal location for a visit, whether it be for a few nights or just a few hours. The town centre is not far away and a good selection of individual shops can be found here including gift shops, banks, a supermarket, grocery stores and chandleries. On the last Wednesday of every month a popular and well attended Farmer's Market takes place at the local Community Centre. Brightlingsea is also locally famous for the number of pubs is has, somewhere in the region of 10, some of which serve food.

Travel to other parts of the district and beyond is possible with a regular bus service to surrounding towns and villages, including Colchester. There is no longer a train station at Brightlingsea, although smaller branch line stations are only a few miles away and buses run twice every hour to the mainline station

at Colchester with regular trains to London. There are also plenty of places easily reachable by boat from Brightlingsea, including Wivenhoe, Rowhedge, Mersea and the Blackwater Estuary. A regular foot ferry service runs during peak season and at other times by arrangement from Brightlingsea Jetty to Point Clear and East Mersea.

Brightlingsea has a linear nature reserve which runs along the length of the old disused railway line which used to run into the town, ideal for birdwatchers or nature lovers. All Saints Church on the top of the hill marks the entrance to Brightlingsea by the only road in and out of the town. In the summer the town is very popular with visitors who access Brightlingsea by road, water or via the Brightlingsea Ferry. Brightlingsea has a very active sailing scene, a Sailing Club and a Yacht Club both with high membership. A large percentage of the children who live in the town sail or have sailing connections within their family.

Brightlingsea Hard is the reception point for boats coming into Brightlingsea Harbour and the Brightlingsea Harbourmaster greets them. A regular water taxi service is available from the new town jetty to the floating pontoons and back as there is no direct link between the pontoons and the land.

As a part of MAYA2, several new floating pontoons have already been installed at Brightlingsea, thus increasing the space available for visitors by several hundred metres. In addition, the old concrete jetty at the Town Hard, which was no longer suitable for the vessels that use it, has been removed and has been replaced with a purpose built floating pontoon with a hammerhead that is capable of taking a Thames Barge. Made from galvanised steel with an environmentally friendly recycled plastic board deck, this new jetty is considerably longer and provides a dedicated berth for the Ferry as well as being available for use by both local and visiting boats.

Rowhedge

Rowhedge is on the opposite side of the water to Wivenhoe. Rowhedge is smaller than Wivenhoe and does not have a station. It does however have good links across the water to Wivenhoe and therefore to the facilities that Wivenhoe has to offer via the Wivenhoe-Rowhedge-Fingringhoe Ferry.

Situated alongside the Colne estuary, Rowhedge is a small rural village in the UK, on the opposite side of the river to Wivenhoe. Rowhedge is an ideal location for watching the waterfront activities and viewing the river from outside the public house next to the quay. There are a few shops in Rowhedge, including a post office and several pubs, some of which serve food.

A few minutes away across the water to Wivenhoe or about 10 mins by road to Colchester, stations are easily accessible with connections to London. There are also plenty of other places easily reachable by boat from Rowhedge, including Brightlingsea, Wivenhoe, Mersea and the Blackwater estuary.

Rowhedge has a charm all of its own with views across the estuary and marshes, ideal for birdwatchers or nature lovers. In the summer the town is very popular with visitors who access the village by road, water or via the Wivenhoe – Rowhedge – Fingringhoe Ferry which runs at high tide between the three locations. Rowhedge also holds a very popular and well attended Regatta in June/July every year when the village comes alive with a colourful display that embraces the whole of the community.

Thames Barges often visit Rowhedge where they can tie up alongside Lion Quay whilst passengers embark and disembark.

Much of the quay edge in Rowhedge is owned by the Parish Council, which allows visitor berthing alongside. There are no toilets or washing facilities as this is a rural location with most visitors arriving and leaving on the same or next tide. The grassy area alongside the quay is ideal for picnics or sitting and watching the boats go by.

As a part of MAYA2, a new pontoon has been installed to the front of the site of the Heritage Centre. This will be used by visiting boats as a drop off and pick up point and also by the Ferry. It will provide access to the water for groups using the riverside centre when it has been built, including the sea cadets.

In addition, to increase overnight berthing space, a section of the quay face which was unsuitable for boats to berth against due to a concrete overhang just below the high water line, has been refaced to correct this problem and allow this to be used by boat visitors to the village.

Blankenberge

Within the MAYA 2 project, Blankenberge wants to improve the water quality of its marina, which will be achieved by decreasing the number of flushings of wastewater into the marina.

These flushings take place during periods of heavy rainfall and are used as a means of preventing certain parts of the cities streets and housing from flooding. Unfortunately the flushings are a nuisance for the yachtsmen and cause the water quality in the marina to deteriorate to a level unacceptable to most berth owners.

Nowadays, there are approximately 30 flushings into the marina each year, depending on weather conditions. During the yachting season these flushings cause problems for the yachtsmen who are at berths near the flushing outlets. Every year the people in charge of the marina, and the City Council, get several complaints.

A study finalised in 2002 determined that the number of flushings can decrease by approx. 80%, reducing flushings to between five and seven per year if a number of infrastructural adaptations are made to the pumps that regulate the flushings. These pumps are situated in the vicinity of the marina and also further into the city.

The necessary works will cost approx. €61,000 which will be funded by MAYA 2 and form Blankenberge's part of the project.

Zierikzee, Schouwen-Duiveland

Alongside the marina in Zierikzee is a road called Nieuwe Haven. It was an ordinary road with two-way traffic and parking for cars. The problem here is that next to the parked cars along the quay are the visitors' berths. The sailing visitors' first sight of the monumental city of Zierikzee was the parked cars. In addition, tourists coming from the city side of the road had to walk across the road or between the parked cars in order to view the marina.
To increase the attractiveness of the marina both for the users as well as the visitors to the city, the Nieuwe Haven has become a boulevard, generating space between the road, the parked cars and the water where people can walk alongside the water.

Through the MAYA2 project, tourist information has been provided and displayed on bulletin boards. On the boulevard signposts to the city centre are placed.

Underground waste collection units are placed in the Nieuwe Haven so the waste containers, for use by both marina visitors and the inhabitants of the Nieuwe Haven, do not have to be placed on the quay.

In addition to the above, a bridge, part of a monumental gateway with a large tower called the Noordhavenpoort, divides the harbour. The area of the harbour behind the Noordhavenpoort is hardly ever used. To increase the attractiveness of that part of the harbour, the new boulevard will be extended by almost 200 metres, after which houses block the entry to the water.

A walking bridge from a free parking area close to the marina has been constructed to encourage people to follow the route from their car, alongside the Nieuwe Haven to the city centre.

The municipality of Schouwen-Duiveland also supports the investment of Marina Port Zélande

(MPZ). Their plan is to develop an alternative to copper based anti-fouling for the underwater section of ships. MPZ is currently working on a concept for a boatlift and cleaning system that quickly and safely cleans the underside of ships of all pollution.

Maldon

Situated next to Promenade Park, Hythe Quay is part of the old port of Maldon. It played an important role in the prosperity of Maldon through the centuries. A number of Thames Sailing Barges, originally used for transporting cargo, still use the Quay today and several are available for charter. Hythe Quay is an ideal location for watching the waterfront activities, viewing the river and saltings. It is also an ideal location for a visit, whether overnight or just for a few hours, although access is limited by the tide and the berths dry out. There are two pubs on the Quay, the Jolly Sailor and the Queens Head, and many more excellent restaurants and pubs within a few minutes walk. The town centre is not far away and a good selection of shops and services can be found here including banks, grocery shops, restaurants and gift shops.

Travel to other parts of the district and beyond are possible with a regular bus service to surrounding towns and villages, including buses to several main line train stations bringing London and the rest of the country within easy reach. Maldon is famous for its sea salt and nearby Tiptree is home to the famous Wilkin & Son jam factory. There are also plenty of other places easily reachable by boat from Hythe Quay, including Burnham-on-Crouch, Mersea and the Dengie Peninsular.

Hythe Quay is situated in an area of natural beauty with views across the salt marshes and mud flats, ideal for birdwatchers or nature lovers. In the summer the area is a real honey-pot with people everywhere. In addition, a short distance along the coast, Essex Wildlife Trust has an experimental nature reserve site at Abbott's Hall, along Salcott Creek, with a visitor centre that is well worth a visit.

Some barges hold open days from time to time alongside the Quay, when members of the public are invited to come aboard for a look around. Information on open days can be obtained from the River Bailiff in a hut on the quay or by visiting the local Tourist Information Centre in the town. Alternatively, to discover the history of the area, you can visit the heritage centre on board the sailing barge 'Glenway'. There are many events held in Maldon each year, including Countryside & Coast Day and Low Tide Day, usually held in Prom Park. For those staying in the town who need to buy provisions, Maldon has a well established farmers market once a month and a street market two days a week to complement its range of individual shops and grocery stores.

At Hythe Quay, some improvements have been made through the MAYA2 project. A purpose built pontoon has been installed, complete with a sliding walkway ramp, and is now available for use by visiting boats. Toilets and washing facilities are available on the quay and a key to the visitor's facilities can be obtained from the River Bailiff who is situated at the southern end of the Quay in the black workshop (with the clock over the door).

Several areas of the quay have also been re-paved to remedy damage caused by tree roots and new bollards and street furniture have been installed.

Chelmer & Blackwater Navigation

Over 200 years ago, engineer John Rennie was commissioned to build the Chelmer & Blackwater Navigation. Whilst most of Britain's waterways were nationalised during the 1940s, the Chelmer & Blackwater Navigation was either too small or insignificant, or too remote to be noticed, and retained its independence.

Today, the Chelmer & Blackwater Navigation is used mainly for leisure purposes with moorings at several locations along its 14 mile length. Many boats enter the navigation at Heybridge Basin every year, including large numbers of Dutch boats. The navigation's 14 miles of tow path take you

through both countryside and industrial areas from Heybridge Basin to Chelmsford, the County Town of Essex. At Heybridge Basin, a sea lock takes you out onto the Blackwater Estuary a short distance from Maldon. There are a wide range of boats on the navigation including traditional wooden narrow boats and small plastic day boats. Fishing is popular, as is canoeing and other water based activities. Tea rooms provide refreshment and the pubs at Heybridge Basin are popular on a summers days as visitors watch boats lock in and out. The navigation winds through open countryside, but at the same time is hidden in many places making it very easy to drive within a few feet of the waterway and never realise it is there.

As for travel to other sites, this is largely the same as for Maldon being that they are so close together. In addition, at the top end of the canal, the town centre at Chelmsford is within a few minutes walking distance with a wide range of shops, restaurants, night spots and services. Closer to the Heybridge end, a Tesco supermarket sits at the side of the canal and boats can tie up whilst they do their shopping. A water taxi service also operates during high season from Heybridge Basin to Tesco and back again.

Most of the improvements on the navigation under the MAYA2 project have involved the repair or replacement of lock gates, paddle gears and other workings to ensure the canal remains navigable. Landing stages have also been installed at several locations to improve access to the water. Large scale clearance of the invasive alien Floating Pennywort weed has also taken place to ensure a clear passage for boats using the canal.

New Ross

During 2000-2001, the Irish Marine Institute participated in the INTERREG IIC MAYA Project. A key objective was to develop a spatial vision for marina developments in a city, an estuary and in sensitive coastal environments. As part of this project, the Institute commissioned a study of Waterford Estuary, which would:

- Assess the socio-economic impact of Waterford City Marina
- Develop a strategy for increasing marine leisure activity within the estuary
- Propose guidelines for planning new marina developments

One of the key findings indicated that a marina development in New Ross would give sailors the opportunity to cruise up river from the coast and would enable access from the Inland Waterways. It would also encourage sailors to explore the "Three Sisters" river network. The "Three Sisters" are the River Barrow, River Nore and River Suir. The Suir is navigable as far as Carrick-on-Suir, where there is an existing berthing facility. The Nore is navigable as far as Inistioge, where there are very basic berthing facilities. The Barrow is connected to the Inland Waterways.

In New Ross, there are no berthing facilities for leisure craft other than a stopover pontoon at New Ross Boat Club and some adjacent tidal moorings. There is no mooring access available to visiting craft coming up river from the coast below the bridge. It is generally accepted that the lack of facilities in New Ross is a significant reason for the under utilisation of the Barrow/Nore Estuary.

The new marina in New Ross will be uniquely situated to:

- Encourage private boat owners on the inland waterways to explore the estuary waters.
- Attract sailing craft currently visiting nearby marinas at Kilmore Quay, Dunmore East and Waterford.
- Satisfy a local demand for permanent and seasonal moorings.
- Stimulate additional demand both locally and regionally.
- Improve social and economic activity within the town.
- Increase access to an emerging leisure activity.
- Enhance, protect and sustain the development of the estuary as location for water sports.
- Assist in the development of the estuary and the marketing of it as a mini cruising ground and a "Gateway to Discover the Three Sisters".

The construction of the marina in New Ross will also:

- Make a positive visual impact on New Ross.
- Attract more visitors to the town of New Ross which will assist economic activity from the spin-off spend.

The project involves the construction of a 60-berth marina and shore facility. The contract to build the marina was signed in early March 2005 and work will begin on site in April 2005. Construction will be completed in May 2005. On shore, toilet and shower facilities will be provided in the Marina Centre, which is situated across the road in the Town Park. Services on the pontoons will include water, electricity and a pump out facility. A berth will also be provided for the New Ross Search & Rescue Boat.

The marina will be located close to the centre of town. There is a service station with a small shop across the road from the marina, where fuel can be bought. There is also a Lidl supermarket beside the service station. There is another large supermarket in the centre of town where a wide variety of shops, pubs and restaurants can also be found. The Dunbrody Tall Ship & Visitor Centre is close by and also provides tourist information.

INDICATORS & METHODOLGY

There are two very important factors that must be remembered when considering the boundaries of this report.

Firstly, that not all of the investments will be complete and installed prior to summer 2005 when the data collection for this report is taking place and therefore it will not be possible to measure the impact of every single investment resulting from the MAYA2 project in this study. In these cases the indicators chosen should be taken as suggestions as to how socio-economic impact could be measured in the future for these investments.

Secondly, each and every investment within MAYA2 is different and most are in no way comparable. Therefore, please remember that this study aims to look at the benefit of the investment in relation to its surrounding area, not in relation to the other investments. Its point is *not* to rank the investments in order of success or increase in benefit to the local area. A single pontoon in a rural estuary can increase value as much as a whole new marina in a town when no facilities already exist.

A meeting was held in January 2005 of the partners involved in this joint action to discuss how the action should be progressed.

The actual term 'Socio-economic' was discussed first and it was suggested that the 'Socio' part could be measured by the level of visitor satisfaction, whilst the 'Economic' part could be measured by the effects the investment has on the local economy, FTE jobs generated and by using multipliers such as the number of visitors multiplied by the average spend per person.

It was agreed that it was important to try and use indicators that wherever possible measure the effects of the actual *investments* and not changes that could be due to other influences.

Visitor satisfaction surveys were discussed at length as a means of measuring the social impacts of the investments. It was agreed that these would be useful for this JMT to use for relevant investments and New Ross and Schouwen-Duiveland constructed a generic questionnaire

using questions from survey forms already in use. This generic questionnaire was circulated to all JMT members who then added their own area specific questions before using the questionnaire to collect data from visitors to their facility if relevant to their investment.

The issue of producing a joint model was also discussed. It was agreed that, as can be seen from the investment details above, the types of investments differ so much from one project partner to another and thus it would be very difficult to apply common indicators to all the investments. It was therefore decided that a 'joint model' in the classical sense of the term is not possible in this case, but that a 'joint methodology' would be used instead. To do this each partner has selected relevant indicators from a common list (which was the result of a brainstorming session and can be found in Appendix 1) and applied them to their particular investment. Many of the indicators chosen are common between projects whilst a few are project specific. Using a common visitor questionnaire, which takes into account many of the indicators on the list, for relevant investments also contributed to the team's a joint methodology (see appendix 2). Obviously though, this questionnaire was not relevant for all investments.

It was agreed that where no additional berths are being provided as a result of the investment, that indicators should be used which measured the improvements to the quality of the facility and visitor's satisfaction levels and usage of the existing facility rather than indicators which measure how many extra visitors are being accommodated.

Breskens, Sluis

With regard to the investments Sluis are making through MAYA2 they chose to use the following indicators measuring socio-economic impact:

Social Indicators

- Visitor Survey
- Policing of the marina
- Types of boats using facility
- Changes in types of boats using the facility
- Number of boats using the slipway
- Number of visitor nights
- Increase in berth capacity as a result of the investment
- Length of stay
- Number of members/changes to membership level of local sailing/yacht
- Clubs
- Length of waiting list for berths
- Number and nature of complaints about facilities/water quality
- Number of visitors per month (to show any lengthening of the visitor season)

Economic Indicators

- Income from harbour fees/overnight stays/short stays
- Tourist tax collected
- Chandlery sales
- FTE jobs created
- Increase in number of related businesses
- Visitor spend

The data will be collected through several surveys. A student will carry out the visitor survey ideally during the spring, high season (summer) and autumn. Other data, such as numbers of berths, boats etc. is available from the port authorities and will be collected once a year. Furthermore data from the Chamber of Entrepreneurs who collect information about jobs created, increased number of businesses etc, will be used.

For the visitor survey Sluis will use the common visitor questionnaire with some of the questions adapted to tailor it to the type of investment.

Brightlingsea, Wivenhoe & Rowhedge

As a part of Colchester's MAYA project investments, a number of new visitor pontoons have been installed at Brightlingsea, along with a new public jetty on the town hard. New visitor pontoon facilities have also been installed at both Wivenhoe and Rowhedge. To measure the socio-economic impact of these new or improved facilities, the following indicators will be used:

- Number of overnight visitor stays per annum in Brightlingsea
- Total number of visitor yacht nights at Brightlingsea per annum
- Increase in number of visitor nights per annum at Brightlingsea
- Number of overnight stays at Wivenhoe Sailing Club per annum
- Number of boats using Rowhedge pontoon and quay per annum
- Increase in visitor berth capacity on the Colne as a result of MAYA 2 investments

Baseline information for these indicators, starting in 2001/2 will be provided by Brightlingsea Harbour Commissioners, WSC, Brightlingsea Town Council and other local boat related businesses. Most of the data collected will be monthly or annual figures.

As for how to evaluate the value of the investments to the local economy, average visitor spend figures could be applied, this will depend on what information is available.

The Wivenhoe pontoon data can be collected for years previous to the installation of the new pontoons, but as the pontoons were not installed until early October 2005, data will not yet be available for this year. Likewise, the Rowhedge pontoon which was installed at the same time as Wivenhoe.

Blankenberge

Social indicators:

- Number of flushings.
- Water quality (if relevant information is available).

Number of flushings / Number of complaints - an inventory of the number of flushings within a relevant period, e.g. every 3 months between October-April and every month in high season May-September, will be kept. This will be based on the information from local clubs by way of complaints they receive or their own information, and possibly also complaints from the city.

Water quality - the Flemish government takes samples of the marina water quality, but this information is not communicated to us. We will request this information from the government.

Note - since the adaptation of the pumps will take place early 2006 (January-March) we will not have relevant information before the season 2006 is underway, round about June or July 2006, so information will not be available before this report is completed.

Baseline information:

- Number of flushings - approx. 30 per annum.
- Water quality - only available if Flemish government will give us this information.

Zierikzee, Schouwen-Duiveland

Social indicators:

- Visitor Survey Questions:

Every two years the marina participates in a survey for marinas in Zeeland. A survey is given to each visitor, they fill this in at a later stage and return it to a designated bureau that collates the results and produces a report. The marina then receives grades for their services and quality based on these findings. Because of the joint participation of

all marinas in Zeeland, a comparison with other marinas in the vicinity is possible.

- Speed of traffic in vicinity and Number of cars in vicinity:

Because of the making of a boulevard and the new layout of the road, the number of cars and their speed has been measured. This measuring will be repeated when the reconstruction is complete.

- Types of boats using facility:

Every day the type of boats in the marina are monitored. This information is send to the Central Bureau of Statistics.

- Number of lock passages:
- No of visitors per month (to show any lengthening of the visitor season):
- Length of waiting list for berths:

The waiting list is not always up to date because migration in the marina is minimal. It can therefore occur that a berth is available for someone who no longer needs it. These people have managed to find a berth in another marina, but haven't notified the harbour master and stay on the waiting list, because they may want the berth in Zierikzee still when one becomes available.

Economic Indicators:

- Levels of cargo traffic at harbour:

This information is gathered on a daily basis and sent to the Central Bureau of Statistics.

- Income from harbour fees/overnight stays/short stays and Tourist tax collected:

This information is gathered on a daily basis.

- How much money invested in the facility by the local authority:

Increase in number of related businesses in area, e.g. chandlery, restaurants, etc.
This information is present at the city hall, but we've never used it before.

- Visitor spend:

The Chamber of Commerce gathers this information. We can use this information.

Maldon

At Maldon, improvements have been made to the Chelmer & Blackwater Navigation including installing new access points to the Navigation by way of landing stages, lock gates have been repaired and the invasive floating pennywort has been cleared from large sections. We will also be installing a new visitor pontoon at Hythe Quay in Maldon. We will use the following indicators to measure Maldon's investment impacts:

- Number of overnight stays per annum at Hythe Quay
- Income per annum from overnight stays at Hythe Quay

Baseline information for these indicators, starting in 2003/4 was provided by MDC River Warden/Bailiff, C&BN and other local boat related businesses. Most of the data collected will be monthly or annual figures.

It is unlikely that the Hythe Quay pontoon will be installed until October 2005 and therefore data to indicate the effect of this investment will not be available until after this report is complete.

New Ross

Baseline data:

1) Description of the current facilities, i.e. number of fixed moorings, number of swinging moorings, any pontoons, slipways or other facilities which are currently in use.
2) Number of boats currently using the facilities with a breakdown indicating whether they are visiting or mooring on a year round basis.
3) Type of boats currently mooring at New Ross i.e. sailing vessel, power craft, river cruiser, etc.

When the Marina opens in June:

4) Number of boats using the marina with a breakdown indicating whether they are visiting or mooring on a year round basis.
5) Type of boats either visiting or mooring at New Ross i.e. sailing vessel, power craft, river cruiser, etc.
6) Number of visiting boats using the marina and length of stay.
7) Visitor expenditure in New Ross - surveys to be carried out on an annual basis

Methodology

- Indicators 1, 2 and 3

Because the marina will not be open until June 2005, we will initially look at the boat owners using the facilities at New Ross Boat Club and we will use that data as a baseline.

- Indicator 4, 5 and 6

This information will be gathered when visitors book in at the marina either to visit or to take out an annual berth.

- Indicator 7

Visiting sailors will be asked to complete the Visitor Questionnaire.

FINDINGS

Breskens, Sluis

In this part the results are described originating from the research of the Breskens marina. This research has been conducted by means of an oral survey. The survey's questions are listed in cooperation with other MAYA 2 partners and directed to the tourist yachtsmen who pay a visit to the Breskens marina. The text of the survey is in appendix 3. This survey's questions are in relation to the personal information of the respondents, their spending in the marina and the village and the sailing movements from and to Breskens. Moreover, the respondents were able to give report marks on marina and environmental related matters. Furthermore, they were asked to give details on the improvements they would like to see concerning the marina and the surroundings.
The survey was applied to 255 respondents and conducted in July and August 2005. The following results originate from this survey.

The majority of the respondents originated from the Netherlands (72%), followed by Belgium (12%), Germany (7%), England (6%) and France (2%). In 55% of cases two people sailed; this category mainly consisted of 56-65 year-olds. In 23% of cases there were four people on the boat. This category mainly consisted of parents aged 36-45 with two children.
In relation to sailing routes and movement of boats, 36% of the respondents made their last stop at the Belgian coast, followed by the Westerschelde (18%), the Veerse Meer (16%) and the Kanaal door Walcheren (11%).

The area most called at after Breskens was, once again, the Belgian coast (38%) followed by the Westerschelde (13%), the Veerse Meer (12%) and the Kanaal door Zuid-Beveland (7%). 85% of the interviewees visited Breskens by sailing boat, the remaining 15% by motorboat. The type of sailing boat berthing the most was Bavaria, followed by Hallberg-Rassy, Beneteau, Jeanneau, Dehler and Dufour.

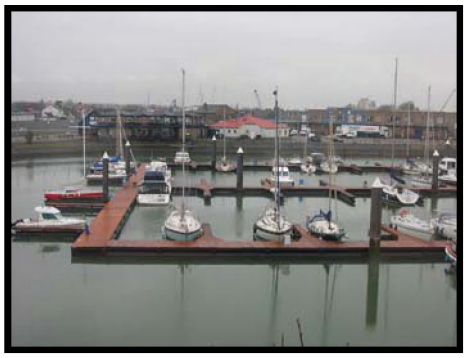
On average, visitors to the marina moored for two days at Breskens and visited the Breskens marina mainly as a stop-over. A minor number of the

visitors called in at Breskens in order to visit the village, to take part in a sailing match, to have their boats repaired or to buy fish.

Regarding all respondents, 82% had visited the marina before, on average they had called in at Breskens about 10 times by boat before. 98% of all respondents plan to visit Breskens again in future and this group would recommend the marina to others.

With regard to the spending of visitor money in Breskens, 85% of the interviewees spent their money on food products. 45% spent money at restaurants and 38% spent their money on non-food products, for example, purchases in the chandlery near the marina or buying fish. On average, visitors spent on average €18 per person per day on food products in Breskens, €29 pppd at restaurants and €15 pppd on other purchases. A few individual respondents, just 3%, visited a bar or café in Breskens. On an average, €28 was spent there when they did.

The total expenditure in Breskens per visitor to the marina is on average €35-40 per day. Most of the respondents spend about €12,50 per day on their marina contribution.



The marina visitors also gave report marks on marina and environmental related matters. The marina scored highly on cleanliness and tidiness, an average of 8/10, the same as for the customer-friendliness in the marina. The respondents marked the facilities in the marina with a 7.5 and the price in relation to quality with a 7.1. The objects of interest in the marina were given the lowest score with 6.3. The marina as an attractive and appealing place to visit scored an average of 7.4.

The respondents overall were content with the village itself. For example, the cleanliness and tidiness of the village were marked 7.5, for customer-friendliness 7.8, and 6.5 for places of entertainment in Breskens. On average, the restaurants were marked with 7.6 and the shops 6.9. Tourist information was given 7.7.

The visitors were also able to suggest some points of improvement in the marina or village during the survey. The recurrence of points of improvement for the marina are: the installation of more electric power facilities for transients, stop the use of coins for electric power supply and showering, the replacement of hook nails by cleats on the jetties, the availability of more than one washing machine and drier and signposting in the marina for incoming boats.

Facilities like the presence of a (small) supermarket near the marina, an attractive run line between the marina and the centre of Breskens, bicycle rental services near the marina, a better equipped playground for children and a wider choice of shops in the surrounding area of the marina, are the points of improvement mentioned the most with regard to the surrounding area.

The study of the social-economic situation of the Breskens marina and the reconstruction of the run line gives the initial impetus to give the village of Breskens an impulse. Eventually, an attractive run line between marina and centre, together with a marina well-equipped to welcome a growing amount of sea yachtsmen in the future, will instigate an economic re-evaluation for this region.

The full results can be found in Appendix 3.

Brightlingsea, Wivenhoe & Rowhedge

- Number of overnight visitor stays per annum in Brightlingsea

Year	2001/2	2002/3	2003/4	2004/5	2005/6
Total income from visitor stays per annum at Brightlingsea	£18,554	£22,649	£30,386	£30,686	£32,216
Total number of yacht nights (@average of £8 per night	2,319	2,831	3,798	3,836	4,027
Increase in number of visitor nights per annum	-	512	967	38	191

- Number of boats using Rowhedge quay & pontoon

There are no formal records kept at Rowhedge Quay, because generally boats don't stay overnight on the pontoon, but the public perception is that it has been enormously successful, mainly in three respects.

Firstly it is used by yachtsmen who come up the river early in the day or simply find the pontoon a more attractive place at which to stop. Although quiet during the winter, through the summer there were about 10-12 yacht landings per week on average.

Secondly, it has transformed the Wivenhoe-Rowhedge-Fingringhoe Ferry - the old jetty was very unsafe and put many people off using the facility. The Ferry continues to go from strength to strength with typical passenger numbers being about 100 passenger trips per weekend.

Thirdly, the young people of the village love it. Many people just sit on it and congregate on it. People launch canoes from it, and now that the Heritage Shed visitor centre opens at weekends there is always a gathering of people at that end of the quay. The local Sea Scouts have also just got a grant to buy canoes and they will operate from the pontoon too.

At the Rowhedge Regatta this year, a locally rebuilt smack 'Pioneer' came and lay alongside (with a crew of Rowhedge Sea scouts, and shortly a new initiative called "Heritage Alongside" will start whereby smacks and other historic vessels welcome the public on board for a couple of hours at high tide. The pontoon makes boarding hazard free compared with clambering down the quay.

In addition, the improved quay face itself is now used much more frequently by both barges and smaller craft. In fact, people seem to be attracted to it because of the friendlier looking timber capping. It is difficult to put a figure to it but it is estimated that there have been about 25 - 30 overnight stays on that piece of quay alone since the work was completed.

Overall the pontoon and refaced quay section have been a huge success and have been warmly welcomed by many different types of users.

- Number of overnight stays at Wivenhoe Sailing Club per annum

	2003/4	2004/5	2005/6
Visitor stays at Wivenhoe Sailing Club (approx)	65	75	85

- Increase in visitor berth capacity on the Colne as a result of MAYA 2 investments

Increase in visitor berth capacity as a result of MAYA2 investments	Yachts per night
Wivenhoe	+ 6
Rowhedge	+ 5 (pontoon not recommended for overnight stays but possible + 3 on pontoon)
Brightlingsea	+ 20

Due to the fact that many of the investments were not installed until this season, data such as visitor satisfaction surveys have not been collected this summer. This is something that would be very useful to consider in the future. Approximate figures are given where actual figures are not collected. Whilst in a marina a manager is usually on hand to give advice to and collect money from visitors, this is not the case with most of the investments made in Brightlingsea, Wivenhoe and Rowhedge.

At Wivenhoe Sailing Club visitors may stay for free and therefore it is more difficult to collect data on visitor numbers. It is requested however that visitors sign the guest book during their stay and some make a donation to the club, so visitor figures for the Wivenhoe pontoons is based on this.

At Rowhedge a bailiff is employed part time, but again, anyone can stop on the pontoon (for which there is no charge) or alongside the quay for which a nightly contribution is payable if the bailiff visits. The figures from Rowhedge are estimated by the Parish Council.

At Brightlingsea, figures on visitor nights spent on Brightlingsea Harbour Commission pontoons is accurate as each and every visitor is met at the entrance to the harbour, is welcomed by harbour staff and shown to their

berth. There is a nightly charge for visitors to the harbour which is based on the length of the boat. The average cost is £8 per night, which is the figure used to calculate average visitor yacht nights.

Blankenberge

As described above, in Blankenberge, as in many parts of Belgium, the sewer system is constructed in such a way as to cope with normal water flows – all sanitary water as well as rain water flows through the sewer pipes to the purification plants in Bruges.

However, when there is very heavy rainfall the sewer system is unable to cope with extreme amounts of water in its pipes. This extra water has to escape via overflows that lead to natural waterways such as canals and rivers. Unfortunately, in Blankenberge, two of these overflows are situated in the yacht harbour.

There are about 30 overflows on average each year of which a substantial number are in the yachting season when after long periods of dry weather, heavy rainfall occurs.

It is not an ideal situation when a mix of wastewater (sanitary and rain waters) flows into parts of the harbour where many yachts are moored. Every year the yacht clubs and the city get complaints from unhappy yachtsmen because of the visual pollution, the smell and the decrease in water quality.

To find a solution for this problem, the City of Blankenberge commissioned a study to investigate the situation and to present possible solutions. The results of this study, presented in 2003, determined that a decrease to an average of 7 annual overflows would be possible if some adaptations to the sewer system were made. These adaptations include both technical improvements by way of new pumps and also infrastructural works to heighten the partitions.

However, before these adaptations could be executed, a number of 'low' sewer connections needed to be adapted. This was to prevent

householders with low connections from being flooded when partitions in the sewer system were heightened. A survey discovered that there were 130 low connections in the city.

The City of Blankenberge assisted the householders affected by low connections to execute the necessary adaptations by giving them information, providing them with technical advice and providing substantial financial support (75% of the cost of the adaptation). When the programme of adaptations began, it was found that 30% of low connections had been adapted before, 30% of the owners were not interested in making the adaptations and 20% requested financial support. All necessary adaptations to the sewer system were completed in the first half of 2006.

Results

The City of Blankenberge expects to have many more satisfied yachtsmen, to receive fewer complaints and to realise an improvements in water quality that may even allow them to apply for the Blue Flag standard in the future.

The City of Blankenberge expects no economic benefits from this project because of the adaptations. The Blankenberge marina is at maximum capacity already and the purpose of the adaptations is not to increase the number of boats in the marina, but to improve the quality of the facilities. Due to the timescale for this project, there are no results available in time for inclusion in this report, but the first results should be available after the yachting season from October 2006. These results however will be weather dependent.

Zierikzee, Schouwen-Duiveland

Visitor Survey Questions

The visitor survey in the marina Zierikzee was last held in 2004. 120 surveys have been distributed amongst the visitors with a response rate of 35%. The visitors gave grades for the quality of the reception, berths, restaurants, shops, chandleries, sanitary units, recreation, maintenance, environmental aspects, service and surroundings. The questionnaire results are in appendix 4. The results have been put in a matrix that shows their opinion of the quality and the store that the visitors set by

the quality of those parts. The matrix is divided in four quadrants. The meaning and the outcome of those quadrants are illustrated below.

Quadrant 1: attention in the short term
The quality is not optimal. Needs improvement in the short term and has the highest priority.
In this quadrant the visitors put: environmental aspects and providing of information.

Quadrant 3: attention in the long term
The quality is not optimal. Needs improvement in term but has a lower priority.
In this quadrant the visitors put: recreational facilities, other facilities, maintenance and repair.

Quadrant 2: Monitor strong positive aspects
The quality is good and has to be guaranteed. These aspects form the strong positives of the marina.
In this quadrant the visitors put: berths, shops, sanitary units, service/ friendliness and recreational possibilities in the area.

Quadrant 4: Enhancing of the product
The quality is good and enhances the product. The importance is less.
In this quadrant the visitors put: restaurants and chandleries.

Visitor registration:
The number of visitors are registered every day and put in a table per month. It shows that in the period April-June 2006 500 more visitors came in the marina than in the same period in 2005. It also shows that in the months January, February and March 2006 less people visited the marina of Zierikzee. This could well have to do with the amount of noise the builders made during the reconstruction of the Nieuwe Haven!

Visitors spending:
In 2005 more than 12,600 boats visited the municipal marina of Zierikzee. With the visitors to the Yacht club added in with that, more than 15,000 visitors spent at least one night in Zierikzee. The visitor survey pointed out that per boat, per day €59.70 is spent, of that €42.80 on shopping, restaurants and bars, groceries and recreation. The rest is

spent on fuel and harbour fees. This means that the local economy benefited to the tune of € 895,500 in 2005 because of the marina visitors.

Maldon

- Number of overnight stays per annum at Hythe Quay

	2002/3	2003/4	2004/5	2005/6
Number of nights stayed ay Hythe Quay	-	55	33	36+

- Income per annum from overnight stays at Hythe Quay

	2003/4	2004/5	2005/6
Overnight berthing fees	£558	£378	£369 (to August 2005)
Use of facilities, e.g. electricity, showers, washers	£640	£889	£105 (to August 2005)

The figures above do not give an accurate reflection of the socio-economic impact of the installation of the pontoon facility and other facilities at Hythe Quay as due to budget cuts at Maldon District Council the River Warden's post became subject to redundancy towards the end of 2005 and since this time figures such as the number of boats using the quay have not been collected due to the fact that fees are no longer collected for berthing. This was an unforeseen problem in terms of the data available for this report and data collection may resume in the future if resources become available.

Nonetheless, the facility has been very well used as the photos show and the installation of the new pontoon has increased the use of the quay greatly without compromising the character of the area which is what attracts many visitors in the first place. It is clear that many more boats than were recorded used the quay in the 2005/6 season, thus making the new pontoon a much needed and well used facility.

CONCLUSIONS

The data collected by the Joint Management Team partners can be divided into two categories: a) those that indicate an increase in quantity of, for example, berths, visitors and spending, and b) those that indicate the increase in quality of the marinas, berths and facilities.

The increase in quantity has been gathered from collecting numbers of, mostly, visitors and boats. This is usually done by monthly or annual figures, collected by harbourmasters and boat related businesses. The quality of the facilities is mostly measured by visitor surveys.

Because most of the developments were carried out in a later stage, not every partner has yet accumulated figures that show an increase in the quantity or quality of the marina and/or berthing. At this early stage, most of the figures in this report serve as a baseline for the future. Therefore is it important to implement the collecting of data in the management of the marinas. In time this data provides an excellent insight in the development and popularity of the marina or berthing site.

One key issue that perhaps hindered the production of this report was the timing of the installation of some of the investments. Many investments were not in place until very near the end of the research period which meant that data could not be collected for these investments in time for the collation of this report. Whilst this has meant that the results available to date are somewhat limited, the exchange of knowledge and problem solving between partners has been huge and highly beneficial, achieving easily what the JMT set out to do.

Despite the lack of figures yet for some of the MAYA 2 investments, it is, however, clear from speaking to users of the new or improved facilities that the investments have had a huge impact on the areas in which they are located. All have been very well received and it is universally agreed are an asset to the communities in which they are situated. The economic value in some cases is very difficult to quantify and often does not give an accurate picture of the economic value of the facility, but the social value is vast. Many areas now have facilities where previously no facilities existed. The social value in these cases is huge whereas the direct impact

to the local economy may appear smaller. Many of the investments now allow boats to stop at previously inaccessible locations and again therefore the positive impact of these investments is extremely high.

It is very difficult in some places to quantify the impact of the actual investment on its own as some investments have increased the profile of an area on the whole rather than just the new facility. Nevertheless, these investments have had a very positive impact on the overall visitor experience of the area whether they can be accurately quantified or not.

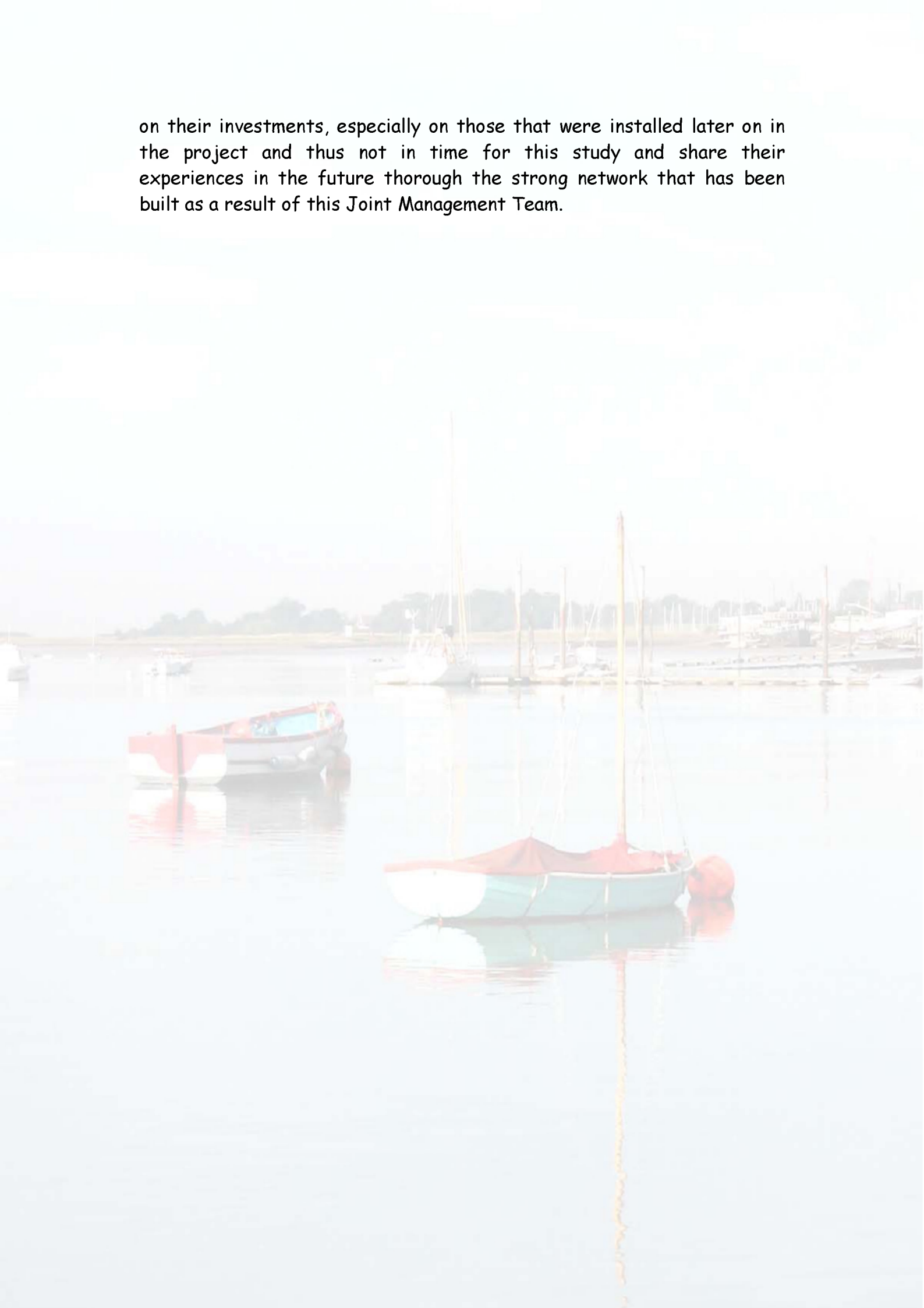
In order to measure customer satisfaction, the Joint Management Team made a generic visitor survey that every marina management can use. The marina can expand the survey to suit their facilities. They can also use the list of indicators that the Joint Management Team has put together. This gives the joint management team a tangible output that will be useful to other marine facility providers in the future.

Visitor surveys give the marina management a good overview of the ratings their marina or berthing site gets by their users. Not only they provide information about what the visitors like and dislike, but they also give an insight in what the visitors think is important or attractive about the marina or berthing site and the surrounding area. With that in mind the management can see which measures should be undertaken to satisfy their customers even more. It is important to remember that word of mouth recommendations are a very important marketing tool in this type of industry. If a customer is happy with the service and facilities they tell on average 2 people. If they are unhappy, they tell 8 people. Many facilities 'guess' what their visitors want; by using a visitor satisfaction survey they know for sure and can direct their financial resources accordingly.

It is fair to say that even with the relatively few results collected so far, each and every one of the MAYA 2 investments have had a positive impacts both economically and especially socially on the areas in which they are sited. This has in turn raised the profile of the project and has had a knock-on effect in some places encouraging other facility providers to consider how they too can improve their facilities to improve the overall visitor experience in the area.

Already much experience has been shared between partners involved in this team. It is hoped that the JMT partners will continue to collect data

on their investments, especially on those that were installed later on in the project and thus not in time for this study and share their experiences in the future thorough the strong network that has been built as a result of this Joint Management Team.



APPENDIX 1

Social Indicators

- Visitor Survey Questions
- Speed of traffic in vicinity
- Number of cars in vicinity
- Policing of the marina
- Number of inhabitants of port area
- Types of boats using facility
- Changes in types of boats using the facility
- Number of boats using the slipway
- Number of visitor nights
- Number of lock passages
- Increase in berth capacity as a result of the investment
- Length of stay
- Number of flushings (Blankenberg)
- Water quality
- Number of members/changes to membership level of local sailing/yacht clubs
- Length of waiting list for berths
- Number and nature of complaints about facilities/water quality
- No of visitors per month (to show any lengthening of the visitor season)

Economic Indicators

- Levels of cargo traffic at harbour
- Income from harbour fees/overnight stays/short stays
- Tourist tax collected
- How much money invested in the facility by the local authority
- Increase in property prices/rent prices near the facility
- Chandlery sales
- FTE jobs created as a result of the investment and what they are related to
- Increase in number of related businesses in area, e.g. chandlery, restaurants, etc.
- Student numbers on water based courses, especially ones aimed at tourists
- Visitor spend

APPENDIX 2

Generic Visitor Survey

APPENDIX 3

Additional info for Breskens, Sluis investments

APPENDIX 4

Additional info for Zierikzee, Schouwen-Duiveland investments