

China, sail when the wind is fair!

Spatial planning of water sport facilities in China

Research for
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Preface

China, sail when the wind is fair! That is the title and the device of the research. In other words I would say: China, start the development of water sport facilities from the moment that the market is ready to enjoy them. The 'wind will be fair' when the Chinese middle class uses water sport facilities on a large scale. In my opinion, there is great potential for successful water sport facilities in China. However, it will take about five to ten years or more before large numbers of Chinese people are familiar with water sport and start participating in yachting.

For seven months, I worked on this research by order of DHV Environment & Transportation. The report is the result of my Master thesis for the program Technical Planning with the specialization Urban Planning. I studied this discipline within the faculty of Spatial Sciences at the University of Groningen in The Netherlands.

It was very pleasant working on this research thanks to the great support I got from my supervisors, the people I interviewed, the editors and my colleagues at the DHV offices in Amersfoort and Shanghai. It would not be possible to do this research without this support and cooperation. In particular I would like to thank Michiel de Jong, my supervisor from DHV and professor Gregory Ashworth, my supervisor from the faculty of Spatial Sciences, University of Groningen.

I hope you will enjoy reading this report and in case you have any further questions, please do not hesitate to contact me via fleur.hol@dhv.nl

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Fleur Hol



Summary

The water sport industry in China is in an early stage of development. This research is done because there is a lack of knowledge about spatial planning of water sport facilities in China and the attitude of the Chinese towards water sports. The main question of this research is:

What are the socio-economic criteria for the spatial planning of water sport facilities in China?

Social criteria deal with customer behaviour, cultural aspects and social change in the society. Economic criteria include competition and cooperation with other enterprises in the region, economic spin-off and price-quality ratios. These socio-economic criteria are useful to test a selected site, a development plan or the design of a marina. If the site/plan/design is in line with the criteria, the spatial planning aspects of the site/plan/design are promising to be successful.

The criteria are developed based on research on:

- The development and structure of Dutch water sport industry;
- Dutch and Chinese marinas (case studies);
- Customer behaviour of the Chinese;
- Plans, legislation and control regarding water sports.

Concepts and approaches

There are several approaches to planning of tourist and recreational facilities: the economic approach, and the cultural approach.

Sub 1: The economic approach that divides the market in different segments. A market segment consists of a target group with shared interests, preferences and ability to take part in certain activities. Every target group asks for a specific set of facilities and services and a specific price. Another pillar of the economic approach is competition. Places compete with each other in space. Water sport facilities should be able to operate independent and find the most suitable location within the network of water sport facilities.

Sub 2: The cultural approach is based on the socio-cultural structure of the society. Especially in countries with a socially segmented society, planners have to realize that not all target groups appreciate a mixture of social classes.

The most important goals for the development of water sport facilities are successful business of the facility itself, improvement of the regional economy and enhancement of visitor satisfaction. Integrated planning can help to reach these goals and make the water sport area more than the sum of water sport facilities.

Tourist facilities can have impact on the regional economy, the environment and on the society. Positive impacts should be exploited by means of plans, government support and cooperation between companies. Negative impacts should be suppressed by means of legislation and control.

During the site selection process for a water sport facility, various aspects need to be considered:

- The function should fit in the local land-use plan;
- The function should not conflict with existing functions in the area;
- It should be a site at, or close to, the water front;
- Accessibility should be good;
- The site should not be further away than 80 kilometers from its potential customers.

In order to attract visitors to the facility, knowledge of the region, the potential customers and the competing alternatives is needed. Planners should always consider how people trade off



different alternatives against each other. Based on that set of knowledge, a suitable site and design can be chosen.

Differences between the Dutch and Chinese situation

The most striking difference between the Chinese and the Dutch situation is the great popularity of water sports in The Netherlands during a long history. In China, the current yachting business is very limited and serves mainly the upper class Chinese, expatriates, tourists and companies. This is different from the situation in The Netherlands where yachting can be affordable for relatively low incomes. However, the Chinese middle class forms the largest potential market because of its massive size and rising average income.

A second difference between the Chinese and Dutch situation that has effect on spatial planning of water sport facilities is the travel time customers accept. Chinese people accept a travel time of three hours from home to a water sport facility, while the average Dutchman does not want to drive longer than two hours.

Thirdly, the spatial planning system is different in both countries. In The Netherlands, a separated governmental body practices integrated spatial planning. In China, there are several governmental bodies dealing with spatial planning issues. Furthermore, land ownership is free in The Netherlands, while in China almost all land is government owned.

Lastly, The Netherlands has much more extensive sets of environmental legislation and legislation regarding water sports. The Chinese government is working on specific legislation for water sports and water sport facilities. All of the differences mentioned in this paragraph have significant impact on spatial planning.

Similarities between the Dutch and Chinese situation

Chinese as well as Dutchman prefer to spend their leisure in natural areas instead of urban areas. Although China does not have such a long history of water sports, Chinese people have a positive attitude towards water.

Future outlook

Some specialists in the field expect that the Chinese middle-class will be ready for yachting within five years. Others estimate that it will take about fifteen years from now. Motor boating will take off first, as it is easier to drive a powerboat than a sail yacht. However, there is a potential for sailing as well. Promotion and training of the general public are keys to development of this tourist industry.

Criteria

After all it turned out that the criteria developed for spatial planning of water sport facilities in The Netherlands are also applicable in China. However, there are different accents. The socio-economic criteria for the spatial planning of water sport facilities in China are:

- a) Location in the regional economy
- b) Regional economy structure
- c) Conflict with legislation, plans or current functions
- d) Accessibility over land
- e) Location in the waterway network
- f) Attractiveness of the landscape at the site or in the region
- g) Ratio between price and quality & services

a) Location in the regional economy

The water sport facility should be maximum three hours away from the target group. In China, the strategic place of a facility in the regional network of water sport facilities is not yet a hot issue but it will be important when the water sport industry is more developed.

b) Regional economy structure

It is recommended to choose a region where potential customers, operators and investors are present. If that is not possible, settle down in a region where these factors can be attracted. Enhance government support by generating positive spin-off and contribution to strengthen the regional economy.

c) Conflicts with legislation, plans or current functions

Planners should try to arrange land ownership, lease land or arrange commitment of the government to develop the project. The water sport facility should not conflict with other functions in the area. The selected site should not be adjacent to an industrial area for example. Planners have to make sure that the proposed plan does not conflict with legislation or current plans from the government.

d) Accessibility over land

In case the facility targets at high class Chinese or corporate visitors, the planner should take into account that the great majority of the visitors need a parking lot. Many of the middle class Chinese and foreigners do not own a car. They rely on public transportation. In that situation there has to be efficient public transportation that brings customers within three hours to the site.

e) Location in the waterway network

Firstly, a marina situated in a network of various water systems is preferable. In case several attractive water systems (such as lakes, rivers, sea, delta) can be reached from the marina, the area offers an interesting variety of sailing routes. The more water systems can be reached within one day, the more interesting is the location of the marina. Secondly, sailors appreciate to have interesting places to sail to in the area. Lastly, physical factors such as: average wind direction and force, sufficient water depth and sufficient sheltered places, determine whether the location in the waterway network is attractive or not. The preferences of the target group should form the basis for the choice of the location. For example: some target groups prefer strong winds, others do not appreciate that.

f) Attractiveness of the landscape at the site or in the region

The ultimate goal of developing a water sport facility is to attract visitors to the site and make them stay as long as possible. In order to do so the site and the surroundings should be attractive. In general Chinese people prefer a site outside the urban area, with beautiful landscape.

g) Ratio between price and quality & services

In China the segmentation of the society deserves special attention. A part of the high class Chinese that chooses for luxury yacht clubs do not appreciate a mixed marina (with a public part and a private yacht club). This issue is of special interest since the Chinese society is getting more and more segmented.

While designing a water sport facility the designing team should keep the following figure in mind:

	Range of services / facilities	Facilities	Parking lot/public transport	Motor boat/ sailing yacht	Location
<i>High class Chinese</i>	Wide	Luxury	Parking lot	Large motor yacht	Natural or urban
<i>Middle class Chinese</i>	Wide	Basic	Public transport	Small motor boat	Natural
<i>Foreigners</i>	Small	Basic	Public transport	Sailing yacht	Natural
<i>Companies</i>	Wide	Luxury	Parking lot	Large motor yacht	Urban

Figure 38: Chinese target groups and the preferred marina profile (own source).



Regatta centers

Criteria are differently weighed for regatta centers than for other types of marinas. The criterion 'location in the regional economy' is of less importance because a longer travel time is accepted. The criterion 'position in the waterway network' is of even greater importance since regatta sailors are more critical to sailing conditions: wind, water depth, current, etc.

Recommendations

It is recommended to develop legislation as soon as possible. In order to keep water sport areas attractive and safe the water police should control the waters regularly. On the other hand positive impacts of water-based tourism can be stimulated by means of legislation.

During the planning process demographic factors need to be considered. Changes in household size, number of elderly and amount of leisure time are examples of trends in the society that influence recreational behaviour. The Chinese society is changing rapidly and many of those changes have a positive effect on the development of water sport.

Promotion and visibility of water sport facilities in the landscape are very important because it turned out that water sports are very unknown among the Chinese population. Many Chinese people, who could actually afford taking part in water sports, think it is only something for the high class. The middle class and future-middle class are interesting target groups for promotion because their income is growing rapidly and they form a massive market.





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Introduction

Motive for research

In The Netherlands, yachting and water sport in general are very popular and practised by many people from different social classes. In China, there are very few water sport facilities and high class Chinese, companies or expatriates mainly use the current facilities. The Chinese middle class is not familiar with this type of recreation, but it has great potential since the average income is growing rapidly and the middle class has more and more leisure time. The high class and middle class can actually afford to buy or rent a yacht or motorboat. If only a small percentage is interested in water sports, it is still a large target group because of the great population and high population density. When the Chinese discover this kind of recreation, the yachting industry could grow rapidly.

DHV Ports, Waterways and Coastal Development is specialized in marina design, writes development plans and does feasibility studies for water sport development. It is the first multi-national company that works on marina & water sport planning in China on a greater scale. DHV has a long time experience with the engineering aspects of marinas. However, there is a more knowledge needed about the spatial planning of water sport facilities in the fast changing China. Additionally, the aim is the get to know more about the attitude of the Chinese towards water sports. To develop a flourishing boating industry in China, spatial planning cannot be missed.

Subject and aim of the research

Boating industry includes the production of yachts and motorboats, marinas and all necessary infrastructure and facilities. To create a well developed industry it is necessary to find the best location related to: expansion of the urban area, the existing tourism network, accessibility via water and land, wind direction, legislation, landscape and ecological values, etc.

The aim of this research is to develop a set of socio-economic criteria that are useful for the site selection, design and planning of water sport facilities in China. It is also possible to use the criteria to test a selected site, a development plan or the design of a marina. In case the site, plan or design is in line with the criteria, the spatial planning components are positively valued. The criteria are developed to be used by urban planners, tourism planners, marina designers, investors in water sport facilities, marina operators and government officials dealing with tourism development or leisure facilities.

Chapter 1:

Methodology

This chapter explains the boundaries of the research and it introduces the main question. The entire research is about this main question. Furthermore, the used methods of research will be explained.

1.1 Demarcation of the subject

During the development of marinas and all related facilities and infrastructure many factors have effect on the process. Legislation gives the preconditions and the technical possibilities are limited. Furthermore, economic feasibility is important and stakeholders will influence the process to protect their own interests. Last but not least, the spatial qualities of a region affect the process because of many reasons: landscape, infrastructure, land use and so on. All of the before mentioned factors are preconditions.

The main question of the research is:

What are the socio-economic criteria for the spatial planning of water sport facilities in China?

Social criteria deal with customer behaviour, cultural aspects and social change in the society. Economic criteria include competition and cooperation with other enterprises in the region, economic spin-off and price-quality ratios. These socio-economic criteria are useful to test a selected site, a development plan or the design of a marina. In case the site/plan/design is in line with the criteria, the spatial planning aspects of the site/plan/design are promising to be successful.

The criteria are developed based on research on:

- The development and structure of Dutch water sport industry;
- Dutch and Chinese marinas (case studies);
- Customer behaviour of the Chinese;
- Plans, legislation and control regarding water sports.

Spatial planning includes economic, environmental, political and social aspects. This research focused on socio-economic aspects. The research focuses on economic development, cultural differences and social change in the society. The reason for choosing this direction was because the Chinese yachting industry is in an early phase of development. In this phase economic feasibility is of overriding importance. Besides that, social change in the society is of great importance because many changes have a positive impacts on the development of water sports. Last, but not least, cultural differences have to be considered when planning in a different society.

Then the question rises: what are the reasons for developing water sport facilities? Who profits from those facilities and which parties might face disadvantages? Water sport facilities can be interesting for many different groups within the society. Citizens can enjoy water sports and accompanying facilities. Furthermore, it causes capital investment and employment in the region. Besides this it can make the region more attractive for citizens and enterprises to establish. Lastly the government can profit by means of taxes.

In order to answer the main question, the following sub questions need to be answered:

1. What are the main concepts and approaches regarding spatial planning of water sport facilities mentioned in the international literature?
2. Which characteristics of the Dutch water sport industry can serve as an example for the development of the Chinese water sports industry?



3. What are the specific spatial planning characteristics of the marinas in the Dutch case studies?
4. What are the criteria for spatial planning of water sport facilities in The Netherlands and are they applicable in China?
5. How is spatial planning of water sport facilities organized in China?
6. How do Chinese people want to spend their leisure time and what is the profile of the target groups for water sports?
7. What are the characteristics of current marinas in China?

Question one is answered in chapter two. Chapter three deals with various aspects of the Dutch water sport industry: its history, water sport regions, customers, planning and legislation and the economic impacts of the water sport industry. Three Dutch marinas with different characteristics are described in chapter four. Chapter five includes the development of criteria for spatial planning of water sport facilities in The Netherlands. Sub question five is answered in chapter six. Chapter seven deals with Chinese target groups for water sports and leisure in general (sub question six). Chapter eight includes two case studies of marinas in China and provides an answer to sub question seven.

The results of the research might have been better when international planning systems and water sport areas were studied. Studying the development of yachting industries in different countries could give a broader overview of the possibilities for developing marinas. Examples from other (Asian) countries might fit better to the Chinese situation than the Dutch cases do. Unfortunately this was impossible within the time schedule of this research.

1.2 Research design

A researcher interprets literature, maps and other information in his or her personal way. By using different types of information (literature, case studies, interviews, etc.) and by analysing the opinion of many persons with different disciplines and different cultural backgrounds, a better picture of reality can be given. More perceptions and more knowledge enlarge the internal validity and give a better view on the case. In order to find answers to the main question and sub questions, the following were sources of information:

1. International literature study;
2. A multiple case study in The Netherlands and China;
3. Interviews with Dutch and Chinese people;
4. Questionnaire in Shanghai;
5. Dutch and Chinese statistics;
6. Fieldwork in The Netherlands and China.

This research focuses on water sport in lake areas because these areas will probably be developed earlier than coastal zones. Marinas on the riverside that are orientated on a river area are no part of the research. The reason for this is that it is not possible to have a marina at the riverside in China. Practically everywhere in the People's Republic it is forbidden to sail on rivers with a pleasure craft. According to WA Yachting Consultants (2005), it is unlikely that this law will be changed in the near future. Coastal regions will be developed in a later phase of development because heavy yachts and advanced sailing skills are needed to sail at sea. For that reason this category is not included in the study.

Sub 1: No theories, neither models for the spatial planning of water sport facilities in China exist. However, general theories about planning of marinas, tourism planning and place promotion are applicable.

Sub 2: A character of case studies is that contemporary problems are topic of research. Secondly, boundaries between the subject of research and its context are vague. Thirdly, there are several sources of evidence or information in case studies (Vennix, 1999). This is all valid for this multiple case study about spatial qualities for marinas. The lack of knowledge about spatial planning of water

sport facilities is a contemporary problem, indeed. Secondly, the boundaries between a marina and its context are vague since the marina depends on the surrounding waters and the attractiveness of the waterway network. The third characteristic Vennix mentioned is that there are several sources of evidence or information. This is the case in this multiple cases study: interviews with managers, government officials and professors were sources of information. Three Dutch marinas and two Chinese marinas served as case studies to find parallels and differences. A condition for the selection of cases was the size, level of facilities and location in a lake area. Mainly marinas with a high facility level were studied because that is the type of marina that fits best in the early stage of development in China. Also a non-profit sailing club was studied. This club is managed by expatriates. It is difficult to set up a non-profit marina for Chinese customers and operated by Chinese people since sailing is a new form of leisure for the Chinese population. People from a traditional sailing culture mostly start non-profit marinas that are operated by volunteers.

Sub 3: During the open interviews, at least a list of standard questions was discussed and in addition specific questions for the case. Interviews with different stakeholders are valuable because they reduce subjectivity. Among the respondents were: marina managers, government officials, researchers, consultants, professors and a foundation to protect sailor's interests.

Sub 4: The questionnaire is held among random visitors of the Shanghai International Boat Show 2005. The respondents are not representative for the entire Chinese population but those are the people that are at least a bit familiar with water sports. It would not make sense to do such a questionnaire among random people in the street. The phenomenon is too unknown in China. The aim was to get to know more about the preferences and attitude towards water sports of Chinese people. With that information, the location and facilities can be better matched with the preferences of the target group. The questionnaire consists of a short list of questions that can be completed in 1 or 2 minutes. To avoid misunderstandings and to reach as many respondents as possible, there was a Chinese and an English version. The questionnaire consists of eight multiple-choice questions. This kind of question was chosen because it is easy and fast to complete. Furthermore, the results are easy to interpret by the researcher who cannot read Chinese.

Sub 5: Dutch statistics were used to analyse structure, size of the Dutch water sport industry and its impact on the economy. Besides that figures about leisure time and leisure activities were analysed as well as tariffs of marinas. For the Chinese situation, figures about income and leisure time were used.

The Dutch system and way of thinking cannot be a blue print for China. The Chinese and Dutch planning systems differ in many ways. The spatial structure of the countries, the society and the people differ as well. For this reasons it is important to do research in China as well as in The Netherlands.

1.4 Analysis

Statistics and interviews were used to find out which spatial factors are crucial for a marina and the surrounding water sport area. During the interview the development process of the marina was discussed. It became clear why the boating industry concentrated exactly in that area and not somewhere else. The most important spatial aspect of the site was discussed. Besides this the target group and business philosophy were studied. Furthermore, future plans were subject of interest because they could give information about improvement of the location. In other words: what could be improved in the particular area? The success of the marina was analysed by visitor numbers, permanent occupancy rate and occupancy during high season. Analysis of land use was done by interviews with local governments and by studying maps. The influence of the government on the chosen location was examined. Besides the case studies the planning system and legislation regarding water sports were studied.



In chapter five, criteria for spatial planning of water sport facilities were developed. These were compared with the Chinese situation in chapter nine. Lastly, in chapter ten, the research concludes with a concrete description of how to use the criteria in China.

Chapter 2:

Definitions, concepts & approaches

This chapter starts with explaining the term 'tourism' and definition of other terms. The second paragraph is about the concept of planning, several approaches to planning and the planning process. Paragraph 3 discusses the positive and negative impacts of tourism that should be considered during spatial planning. The first three paragraphs deal with general definitions, concepts and approaches of tourism planning. Paragraph 4 zooms in on a specific form of tourism planning: the spatial planning of water sport facilities. The last paragraph is about marketing and promotion concepts that can be applied to water sport facilities.

2.1 Tourism defined

First of all, the word tourism has many meanings. Tourism is a conglomeration of physical parts, programs and actions. It does not have one goal or objective but many. Mathieson and Wall (1982) defined tourism as:

"Tourism is the temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations, and the facilities created to cater to their needs".

Yachting can be an activity people undertake during a tourist trip. The most important things people need for yachting are a pleasure craft and water. Of course that is obvious, but at the same time these are the most distinctive elements that make water sport different from other kinds of tourism and recreation.

Chadwick (1994) developed a similar definition of tourism, containing three main concepts:

1. The movement of people;
2. A sector of the economy or industry;
3. A broad system of interacting relationships of people, their needs and services that respond to these needs.

Water sports require many facilities and products such as a sailing yacht or motor yacht or surfboard, etc. A marina or at least a mooring is needed and a hoist and ramp to get the yacht out and in the water. Lastly, rigging and sails are essential for most water sports. Almost every form of tourism is distinctive for the required equipment and facilities. In the world of water sports are so many products produced by an independent part of the economy that various people claim that water sport is an "industry". Others, such as Gunn (2002) argue that tourism is not an industry because it does not produce a *singular* product. Tourism involves an enormous diversity of "products". However, the opinion that tourism business has great economic impact is generally shared.

In recent decades numerous interpretations and definitions of tourism have been developed. Additionally, models based on a system approach were created. Gunn developed a model with the following key elements:

- "Tourism is not a discipline; instead it is a multidisciplinary field.
- Tourism is generated by two major powers: demand and supply.
- Within demand is a diversity of traveller interests and abilities.
- Within supply are all the physical and program developments required to serve tourists.
- Tourism includes many geographic, economic, environmental, social and political dimensions.



- Tourism is not an industry: it is made up of a great many entities as well as business” (Gunn, 2002: 9).

In Gunn’s opinion, these six elements represent the definition of tourism that fits the best to contemporary planning challenges and opportunities. Compared with manufacturing industries, tourism needs different planning strategies. Tourism transportation services move travellers to and from their destination. In other words: the tourism distribution system moves markets to the products at destinations. This is exactly the contrast of what happens in manufacturing markets, where products are delivered at the market area (Gunn, 2002).

Definition of other terms

- A *marina* is also called yacht-basin. The Dutch government describes a yacht-basin as: “A port, including the land that belongs to this port. Provides a place to berth or moor a pleasure boat or yacht” (website Advies Overheid.nl, 2005). Various facilities could be found in a marina. For example: bathroom, laundry facilities, restaurant, bar, fitness, dry storage for yachts, boat repair, boat shop, small grocery store, etc. According to the National Association of Engine and Boat Manufacturers Inc. of America is *marina* is: “a modern waterfront facility for recreational boats” (Adie, 1984).
- A *pleasure boat* is: “A ship or yacht used for sport or leisure, no matter what type of ship it is or is which way it is driven”.
- *Criterion* is a standard of valuation.
- *Yachting industry* includes the water recreation sector, production of yachts, marinas, servicing, repair, provisioning chandlery and all necessary infrastructure.
- *Water recreation* includes boating, recreation with motorboats or rowboats, water cycles, (wind)surfing. Sometimes swimming, fishing and beach/riverfront recreation are also included. This research does not include these last mentioned types.
- *Water sport industry*: An ‘industry’ is an economic sector in itself and part of the ‘regional production structure’ (interview DHV, 2005b). The water sport industry includes yacht building, recreational boating and all services related to that. The water sport industry is part of the ‘maritime cluster’ as well as the ‘recreational cluster’. The first one includes:
 1. The sector that uses ships for commercial goals, this can be transport, work at sea or exploitation of the sea.
 2. Ship building sector and related technical sectors.
 3. Organisations that need maritime knowledge to provide services to the before mentioned sectors

Secondly, the recreational cluster which includes all kinds of recreational and tourists activities out of the house.

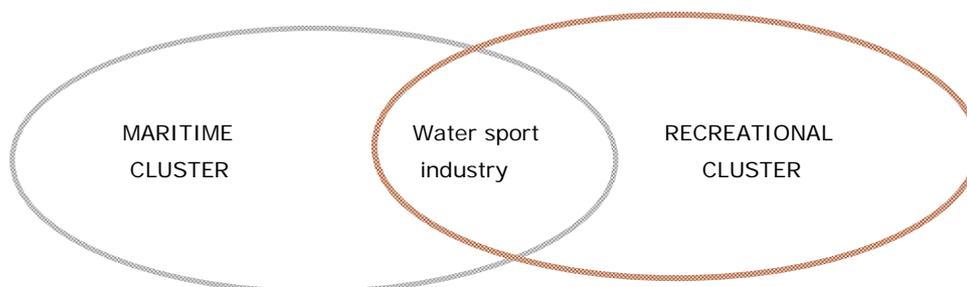


Figure 1: The water sport industry within the maritime cluster and recreational cluster (own source).

2.2 Tourism & recreation planning

The concept of planning

Spatial planning exists since thousands of years. In 3000 B.C. Indian cities were divided into square blocks, oriented to the central points. The street pattern provided circulation between the blocks. During the middle ages fortified cities were planned with encircling walls and moats. Even building codes and zoning date back to ancient times. These examples of city planning were based on a strong centralized authoritative government. In the 20th century the 'social' and 'economic' dimensions were added to spatial planning and made it multidimensional. That is why Rose (1984) describes planning as a '*multidimensional activity that seeks to be integrative. It embraces social, economic, political, psychological, anthropological and technological factors. It is concerned with the past, present and future*' (Gunn, 2002: 6). Planning is not a distinctive discipline but a combination of many (Gunn, 2002). Compared with planning in general, tourism planning has a shorter history. Gunn was one of the first ones to publish a major work in tourism planning: *Vacationscape: Designing Tourist Regions* (1972).

Approaches

Depending on the situation and aim, planning can be practiced in a different way and have different accents. Examples are: the economic approach, cultural approach, time scale approach, political approach, etc. The first two approaches are of special interest in this research since the aim is to develop socio-economic criteria that can be applied in another culture.

Economic approach

First, the economic approach for spatial planning of tourist and recreational facilities is explained. The starting point of the process is market analysis. In case there is demand for more facilities the process can be continued. If there is no demand it is better to move to another region, choose another market segment or simply wait until there is enough demand. When one segment of the market (for example: non-profit marinas with basic facilities) is saturated, another segment (luxury yacht clubs) can be growing at the same time. After the decision has been made to enter the market, the question rises whether a water sport facility or water sport company fits in the regional economy. The company or facility has to settle down and find the right place within the regional economic structure. Places compete with each other in space. The facility should be able to operate independent. In case related enterprises in the region disappear or settle down in the same area, the enterprise in question must still be able to continue operation (interview DHV, 2005b).

It is important to know the disposable income because a part of that is the potential cash flow for the water sport sector. The disposable income is the total income minus taxes and fixed expenses such as rent, insurance, cost of living and education, etc. It is important to consider whether the economy is developing or developed because this has a direct impact on consumer behavior. In case the economy is developing, growth statistics should be studied in order to predict changes in the consumption pattern. Furthermore, it is interesting to consider the lifestyles and preferences of the target groups. Based on all this information it should be possible to estimate the size of the target groups and the price they are willing to pay for recreation (interview DHV, 2005b).

This system is based on undisturbed 'market economy'. Influences from the government such as regulations, financial support and taxes disturb this system (interview DHV, 2005b).

Cultural approach

It is important to offer a suitable set of facilities for a target group in terms of price, quality and kind of facilities. The facilities should match with the aim and ambition of the target group (interview DHV, 2005b).

Some marinas have a combination of luxury facilities for the high class and budget facilities for the middle class. It is not accepted in every culture to combine facilities for target groups with a different status in one marina. In several countries the elite prefer to be separated from the middle-class.



When planning for a foreign culture, it is good to discuss cultural issues during the design of the marina. Particularly in countries with a socially segmented population, such as China, it is important to consider this (interview DHV, 2005b).

The planning process

The planning process is integral in different ways. Firstly existing tourist activities must be considered in the new project. Secondly, it is common to include different levels of the government that are dealing with tourism planning in the study. Including different levels of planning has the advantage that there is greater continuity and consistency of the recommended development patterns. Continuity is achieved by monitoring, which is shown in the figure below.

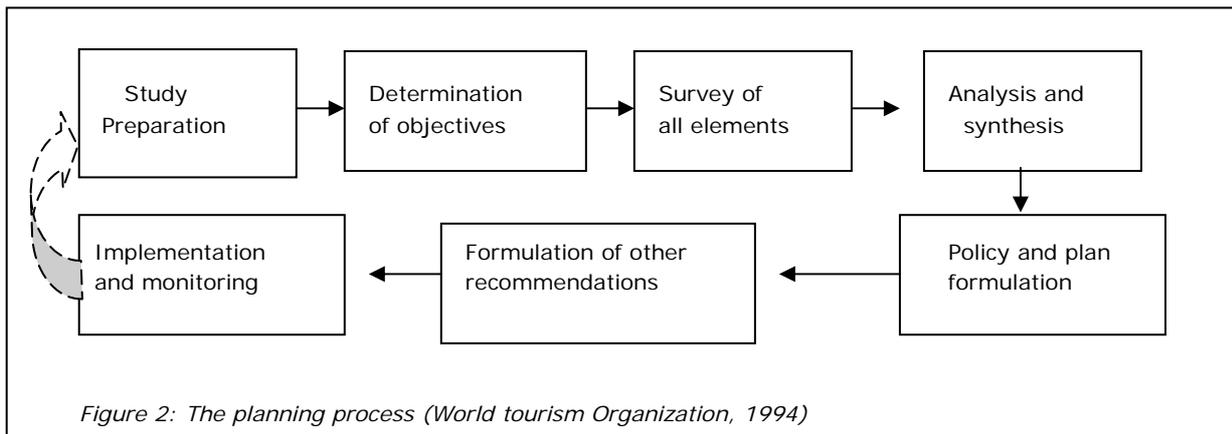


Figure 2: The planning process (World tourism Organization, 1994)

The planners

Every destination has something unique in terms of location, history, development pattern, tradition or society. For that reason it attracts visitors. It is the planner's task to discover the special quality that makes a place unique and make this the foundation for development in order to appeal to markets. As tourism is very broad developed and managed, its planners can be divided in four categories: the business sector, the public sector, the non-profit sector and professional consultants. Since the last three sectors deal most with the spatial aspects of planning, they are explained below.

The public sector:

Institutional elements are needed for effective development, operation and management of tourism. These elements include (World Tourism Organization, 1994):

- Organizational structures such as government tourism offices in particular and hotel associations for example.
- Legislation and regulation: for example standards and licensing requirements for hotels and tour and travel agencies.
- Education and training for employees in the tourist sector.
- Availability of financial resources to develop tourist attractions, facilities, services and infrastructure. Providing mechanisms to attract capital investment.
- Marketing strategies and promotion campaigns.
- Travel facilitation of immigration (including visa arrangements) and customs.

Another very important institutional element is the distribution and enlargement of economic benefits. At the same time the environment needs to be protected, adverse social impacts reduced and cultural heritage conserved (World Tourism Organization, 1994).

Tourism promotion and marketing are accepted as roles for the government in a great number of countries. Billions of dollars are annually spent on promotion from the government's treasury. The largest share of the budget is most of the time used for advertising. Much less is spent on research, planning, training and information systems. Besides this governments invest in National

Parks, museums, archaeological sites, outdoor recreation facilities, etc. In some countries governments even invest in resorts (Gunn, 2002). Another point that makes governments influential is the fact that they own and maintain a massive part of the infrastructure upon which tourism depends. On national level this includes communication infrastructure and electrical power. On local level it often includes water supply, sewage disposal, police, fire protection and streets and lighting of public space. More specifically, the government can be owner or manager of tourist attractions.

The way tourism is developed (and is developing) is dependent on city planning, building codes and zoning. For infrastructure as well as for planning and regulation it can be said that this has huge impact on the attractiveness and convenience of a place (Gunn, 2002).

The non-profit sector:

Although laws vary in different countries, most of the time all revenues from the non-profit sector must be expended for operational and capital costs, not as investment. Ideas and plans developed in this sector often contain strong social and ethical elements. The non-profit sector is as important for the overall tourism as the business sector and governmental sector. In recent years cultural and natural resource attractions gained popularity largely due to support from the non-profit sector. The voluntary, informal and family sectors have great potential, especially in developing countries. Instead of inviting multinationals to invest foreign capital and labour, local talent and labour can be implemented. This can surely mean a boost for the regional economy since it enlarges the multiplier effect (Gunn, 2002).

Professional consultants:

Various kinds of professionals are engaged in planning different aspects of tourism. First there are the building architects, closely related the landscape architects, thirdly the urban planners and last but not least civil engineers. In Gunn's opinion professional consultants can provide effective planning assistance. Characteristically for tourism is that in this work field the before mentioned specialist work in teams. They work on development projects, provide consulting services and solve planning conflicts between involved parties. In the last mentioned case it is likely that they can analyse the situation more objectively than for example a government that is involved in the project (Gunn, 2002). In developed countries it is more common to hire consultants than in developing countries (interview DHV, 2005a).

Goals for development

Gunn suggests four goals for better tourism development. These goals are ideals that may never become fully reality but serve as framework.

1. Enhanced visitor satisfaction;
2. Improved economy and business success;
3. Sustainable resource use;
4. Community and area integration.

Especially the first two goals are of direct importance for water sport development. A popular method of evaluating 'success' is to measure volumes of tourists. However, participation does not necessarily mean 'satisfaction'. By providing a good combination of land acquisition, design, development and management, planners must try to maximize the chance of visitor satisfaction. As problems lower satisfaction, it is important to avoid them as far as this is possible by physical development and management (Gunn, 2002).

Secondly 'improved economy and business success': Factors that influence tourism's success are for example geographical relationship to markets, attractions and attractiveness and resources for development. Besides this the involvement of all sectors (government, non-profit, commercial) must be examined for their potential for developing a tourist economy. Lastly it is important to determine



the social, environmental and economic impact of every new investment. These topics are discussed in chapter 2.3

Advantages of tourism planning

Proper tourism planning maintains and conserves natural and cultural resources for present and future use. There are possibilities for better tourism success when planning is practiced at the scale of the destination zone. The destination zone includes one or several water sport facilities and related activities in the destination area. To make the total destination zone more than the sum of facilities, integrated planning is necessary. One level higher is the regional scale. One region includes several destination zones. A "regional tourism plan" can yield profit because investment feasibility is more attractive to investors and developers when opportunity zones are identified. As an example the federal government of Canada provided tourism planning methodology for all provinces. The methodology included: 1) a report on market-economic foundations for tourism development, 2) resource foundations for tourism development and 3) destination zone analysis and potential analyses based on the market-economic situation and resource foundations (Gunn, 2002).

The tourism sector can be developed more efficient by interrelating all tourist attractions, activities, facilities, services and infrastructure (World Tourism Organization, 1994). Clustering of attractions is preferred because of more efficient development, management and more convenience for the user. Planning should provide a well-balanced situation of clustering without overcrowding. Planners should not forget about the design and appearance of transportation links the tourists needs to use before reaching the attraction. Running through an ugly part of town before reaching the attraction might scare visitors off and make them change plans (Gunn, 2002)

Gunn argues that a major change in the design process for tourism is essential. The preferences of the potential user are often ignored. Including research about the travel market in the development plan, will improve tourism site planning. The basic elements of planning at the scale of a water sport facility are (Gunn, 2002: 25):

- Transportation and access from travel markets to the facility;
- Attractions (marinas) that meet market needs;
- Efficient and attractive transportation links between cities and the facility.

2.3 Impacts of tourism

In this chapter economic, socio-cultural and environmental impacts of tourism are discussed in detail. These impacts can be positive or negative and for that reason some should be stimulated and others should be prevented.

2.3.1 Positive economic impacts

The economic impacts of tourism can be impressive. As Clare A. Gunn states:

"Evidence of the economic impact of tourism is so overwhelming that it is no wonder that undeveloped countries seek it and industrialized nations wish to protect it."

An important argument for development of tourism is economic improvement. That is interesting for the government, investors, developers and other parties in the regional economy. Benefits from tourism in regional and local economies are found in stimulation of new enterprises, income for local entrepreneurs and employees, employment opportunities and lastly tourism can give a region a positive image. These positive economic impacts are called 'positive spin-off' and they are often the basis for governments to develop tourism industries. Central, regional and local governments gain directly from tourism through the collection of direct and indirect revenue. Direct contributions include

travel taxes and taxation on incomes generated by tourism enterprises. Indirect sources of revenue include the many taxes levied on goods and services by tourists. There are five factors that significantly influence tourism's role in the GDP (Gross Domestic Product): (Youell, 1998)

- *The stock of resources:* natural resources, built facilities, human and financial resources. These are essential ingredients for tourism development.
- *State of technical knowledge:* in general, economic revenue from tourism is the highest in countries with high technical expertise.
- *Social and political stability:* existing or expected problems in the destination area will scare off visitors.
- *Attitudes and habits:* the opinion and attitude of the host community towards tourists, influences development of tourism.
- *Investment:* private or governmental investment in capital projects, promotion, training and business support affect the pattern and intensity of tourism development.

The multiplier concept

Money spent by tourists in a destination area has both direct and indirect economic benefits. Direct benefits are generated by enterprises offering facilities for tourists, such as accommodation, tour operators, marinas, etc. Indirect beneficiaries are businesses that provide goods or services. For example banks, shops and petrol stations. The actual economic benefit of tourism to the area is greater than the sum of direct and indirect economic benefits. Namely, some of the money earned from tourists' spending is re-spent in the local economy, thereby generating extra income. For this reason the total benefit to the area is higher than the amount of money spent by tourists. The extent to which the original spending is re-circulated in the local economy to increase the total income of the region is called 'multiplier concept' or 'income multiplier' (Youell, 1998). Keynes developed this theory in the 1930s (Goodhead and Johnson, 1996).

The effect of the multiplier concept depends on the structure of the local economy. When the cash flow within the local economy is high, the multiplier effect will be high. When many people in the region spend their money outside the local economy, less money is re-spent and the multiplier effect will be lower. For this reason Youell suggest governments to develop tourism industries with high multiplier effects. With help of policies enterprises should be stimulated to choose local suppliers and local employees. However, this is just one point of view. There are probably many other experts who do not agree with these protectionist thoughts.

Goodhead, Kasic and Wheeler explain how the multiplier effect works when the impact of tourist expenses in a marina is analysed. Increasing or decreasing expenses by marina customers will have the following effects on the regional economy (within the boundary of the municipality):

1. Direct income: organizations directly serving the marina will be affected by the change in expenses.
2. Indirect income: firms supplying the organizations that directly supply the marina customers will be affected by the change in expenses.
3. Induced income: the changes in income caused by the direct and indirect effect will cause further changes in expenses and hence employment.

Employment in tourism

One of the most important motives for governments and other public agencies to stimulate the growth of the tourism industry is its ability to create jobs. The tourist sector is labour intensive. Compared to creating jobs in the manufacturing sector, service jobs in tourism are most of the time easier and cheaper to create. Reasons for this are the lower capital start-up costs and the low skilled character of many (but of course not all) jobs in tourism. However, performance of staff in terms of being representative and hospital is crucial to the image of the region (Youell, 1998).



The fact that the tourism industry can often only provide seasonal work brings along some problems regarding the workforce. Temporary jobs sometimes attract employees who are less dedicated to their work and are not interested in working on their career. Because of the temporary character there is little time to develop the required skills for the job. With that, jobs in tourism are often low paid and sometimes have poor working conditions. All these negative elements make jobs in tourism often considered of low quality and little status. According to Youell governments and commercial operators should work together to improve the character of jobs in tourism. Besides this public agencies should stimulate tourism companies to release staff for training in operational and management skills.

Besides the multiplier concept and employment in tourism, the World Tourism Organization (1994) mentions the contribution to government revenues. These include tourist user taxes, airport departure taxes, customs duties on imported goods used in tourism, income taxes on tourism enterprises and employees and property taxes on tourism establishments. Furthermore, the WTO draws attention to income generated from tourism and contribution to the Gross National or Domestic Product. And lastly foreign exchange earned from international tourism. More general benefits are that tourism helps justify and pay for transportation facilities and services and other infrastructure that can be used by the whole community. Another general advantage is that tourism can work as a catalyst for growth in other economic sectors.

2.3.2 Positive socio-cultural impacts

Youell (1998) explains that many of the prime motivations for tourist travel are based on social and cultural experiences. It can be said that this has positive effects on travellers. Host communities can also benefit from contact with people from different countries. They can learn from other cultures and they can learn languages. Not only visitors themselves but also facilities and services for tourists can be interesting for local people when they are open for locals. Of course the environment has to be clean and attractive. When locals realize the importance of helping to maintain the environment, it can give them a sense of civic pride. Lastly, protection of cultural heritage can be a positive impact for the region.

2.3.3 Positive environmental impacts

In this paragraph 'environment' concerns the physical setting in which tourist activity takes place. Money earned in the tourism sector can help to conserve and protect natural and built resources such as national parks and monuments. National parks and monuments are often a reason for visiting a region. In that way tourism is a catalyst for environmental improvement. Besides the before mentioned improvements the general environment of a destination area could be beautified. Plants and trees, upgrading of street furniture, improvement of signs and renovation to buildings could make the environment more attractive. These kinds of improvements are not only beneficial for tourist but also for local residents. Thereby the region gains attractiveness for inward investment of all kinds (Youell, 1998).

The World Tourism Organization mentions that those benefits are of special importance for countries with limited resources for environmental conservation. At the same time it helps to justify expenses for conservation and protection because it improves tourism development.

2.3.4 Negative economic impacts

After having discussed the positive impacts of tourism to the regions economy, the negative side of the story is explained. One of the negative economic impacts is the flow of labour from traditional, primary industries to jobs in tourism that may seem to be more glamorous. This happened during the early development of Mediterranean tourist destinations. Fishermen and farmers quit their jobs to work in hotels and restaurants. The shift caused a lack of workforce in the primary sector. Nowadays this problem is still found in the developing countries. A second problem occurs in rising prices. Local

residents may be penalised by higher prices for goods and services in peak season. Furthermore, land prices may rise which makes it more difficult to settle in the region. Local people may also be disadvantaged by having to pay indirectly for tourist facilities and services that they do not use. And even worse: investment in those tourist facilities can divert resources away from other projects such as schools or libraries. The before mentioned substitution of other economic activity is called the 'displacement effect' (Youell, 1998). The tourism industry has the potential to deliver significant economic benefits. However, negative economic impacts should not be forgotten.

The World Tourism Organization warns that loss of economic benefits can occur if a big part of the goods and services used in tourism is imported and if many tourist facilities are owned and managed by foreigners. In the case of a new to develop water sport industry in China these factors are likely to have an important impact. Chinese have hardly any experience with marina design and management, etc. In order to maximize the economic benefits for China the local governments should stimulate the development of a local water sport industry.

2.3.5 Negative socio-cultural impacts

In her book 'Tourism planning' (2002), Clare A. Gunn discusses positive impacts of tourism like job and business opportunities, more entertainment, parks shopping, hotels and restaurants. In relation to this she writes that it appeared that friendliness and social life among residents degrades as a result of tourism development. Youell mentions that in case tourism is badly planned, managed or developed, it can have the following negative effects at local, regional, national or even international scale: (Youell, 1998).

- Overcrowding;
- Distortion of local customs;
- Loss of native languages;
- Demonstration effect: the mixing of the host community with more wealthy people with different political and social values can change the social and political values of the natives. Local people start imitating tourists without understanding the different cultural background.
- Loss of traditional industries;
- Fragmentation of communities;
- Alterations to religious codes;
- Rise in social problems.

In addition, to these effects Gunn mentions competition for land, competition for goods and services and litter production.

2.3.6 Negative environmental impacts

Many travellers are attracted by areas that are less disturbed by human activities. Many of these places are sensitive to disturbance. If they are to serve as basis for development of tourism they need to be protected (Gunn, 2002). Fortunately many tourists all around the globe show more and more consciousness about the environment. But still, tourism can have harmful impacts on the environment (Youell, 1998). The British Environmental Impact Assessment Regulations contain key impacts of marinas that should be researched before a marina can be developed (Goodhead and Johnson, 1996: 187):

- Noise
- Pollution
- Traffic
- Danger
- Nuisance
- Hours of operation
- Loss of privacy
- Overshadowing or overlooking
- Visual intrusion
- Loss of visual quality
- Loss of amenities
- Loss of habitats
- Reclamation
- Dredging of estuaries
- Erosion/sedimentation of estuary/coastline



The World Tourism Organization (1994) explains that 'visual pollution' and land use problems can occur. For example as a result of poorly designed tourist facilities, bad urban planning or landscaping, disturbing advertising signs and structures that block scenic views.

Carrying capacity

Many environmental as well as socio-cultural problems are caused by overcrowding and over-use of facilities. Every area or tourism facility has carrying capacity. When that threshold is exceeded the area or facility is damaged. Carrying capacity can be roughly divided in three categories:

1. Physical capacity: the spatial, limited capacity of a resort or facility. For example the land available, number of bed and parking lots.
2. Perceptual capacity: is about the quality of the visitor's experience and the acceptance of the local community.
3. Biological capacity: the threshold above which flora and fauna is unacceptably damaged (Youell, 1998).

The exact carrying capacity is different for every place. Additionally, it is difficult to establish the perceptual capacity because each person or group has a different perception. A crowded resort might be a hell for one person and a pleasure for someone else. The biological capacity varies through the year. During the breeding season areas are likely to be more sensitive. By using a quota system to regulate the number of visitors damage can be limited. Other possibilities are restricted entry of a sensitive area and zoning according to function. The World Tourist Organization suggests extending the tourist season. This can be a solution for overcrowding during the peak season. In The Netherlands the problem of overcrowding is tackled by 'spread holidays'. The country is divided into three parts, every sector has summer holiday in a different period. Another option is to attract tourists outside the peak season by means of discounts.

Legislation and control

Besides the standard regulation and control water sport areas ask for specific attention. It is necessary to control bilge water dumping, use of motor yachts in environmentally sensitive areas, use of boat anchors on coral reef, fishing and collection of live seashells and coral (World Tourism Organization, 1994). In later chapters current legislation and control in The Netherlands and China is discussed. It will become clear that there are great differences in development of specific legislation for water sports.

2.4 Spatial planning of water sport facilities

Site selection for a suitable site for a new marina has become very hard. Since residential areas at the waterfront became more popular, many good potential sites for marina development were taken by real estate developers (Tobiasson and Kollmeyer, 1991).

Site selection

In his book "*Marinas, a working guide to their development and design*" Donald W. Adie writes: "It is better to choose the site on the evidence of very good geographic, engineering and planning data and subsequently marry to it the type of services and layout which suit best to the site." In other words: the location is leading, after that the function of the marina comes in the picture. Furthermore, he lists six points that should be researched before site selection:

1. Legal work
2. Planning
3. On-shore considerations
4. Off-shore considerations

5. Engineering
6. Finance

These components are interrelated. Because the planner has a prominent role in the first four topics of research, these are explained below.

The legal work

Planning acts regarding the area need to be examined. When land needs to be purchased, future options should be taken into account (Adie, 1984).

Planning

The planner plays an important role in the site selection process. He brings together relevant information, which forms the basis for an objective and logical decision. The planner should always bear in mind the context in which the marina will be built. Moreover, he may have to accept some essential economic or engineering decisions. The first phase in the planning process is establishing land ownership. In relation to this dates and phasing of land availability need to be examined. Furthermore, background information about the development of the region is helpful. Regional studies, economic planning council reports and statistics can provide an idea of the expected developments. Information about land use in the area is also part of the basis for site selection (Adie, 1984). For example, it is important to know whether the area is mainly agricultural, residential or industrial. Industrial areas are likely to be unattractive for water sport. Residential areas might house potential target groups for water sport activities or even villas with private berth. Last but not least competition from marinas nearby is an issue of examination, if applicable for the site. Establishing land ownership is a different issue in China. Since the government owns all land, it is no issue of worries for the government. For private parties on the other hand, this fact makes developing water sport facilities complicated. When a site is selected the plan has to be approved by four government committees: Land and Resources Committee, Transportation Committee, Construction Committee and the Committee of Tourism (interview Pu, 2005).

How much choice for the site there is, depends strongly on legislation. Sites protected by law for their natural or heritage values are not discussable. Besides this ownership or reservation of places for other functions than 'recreation' shortens the list of possible sites. The search for marina sites asks for all planning skills that are needed to plan a small town. In fact a marina is nothing less than that (Adie, 1984).

Local authorities are cautious when planning permission is sought for expanding marinas or construction of new marinas. The six most heard objections from planning committees are the eight statements below. Often local people initiate them (Adie, 1984).

1. "It will spoil the view.
 2. It is ecologically damaging.
 3. It will cause pollution.
 4. It will cause erosion or silting.
 5. Residents will be cut off from areas or beaches previously accessible.
 6. There will be congestion on the water: marina boats will interfere with swimming or fishing.
- Two less-frequent heard reasons for dissent are:
7. Yachting is a rich man's hobby.
 8. The marina will displace cheaper moorings".

To meet these objections it is wise to keep the following in mind: (Adie, 1984)

- a) Explain the plan as soon as possible to local people. Do this as honestly and fully as possible.
- b) Talk to the planners from the local government as soon as possible.
- c) A professional development team should deal with the local planners and relevant committees.



- d) Do not underestimate the 'stopping power' of local pressure groups.
- e) In case you know before what the fears and objections are (or may be), adjust the project to the circumstances.
- f) Take care about ecological values. Inter-tidal lands and wetlands can be rich biological areas.
- g) Make sure the information you spread is professional, well presented, clearly written and attractive to the receiver.
- h) Reserve sufficient time and money to achieve the before mentioned points.

Tobiasson and Kollmeyer listed 13 criteria. Besides technical criteria, the following socio-economic criteria are on their list:

1. Appropriate zoning and in conformance with public plans for the area;
2. Adequate site at the water front;
3. Outside of a wetland or resource protection area;
4. Outside a designated port area;
5. Outside an area of restricted historic preservation;
6. Not adjacent to a public beach;
7. Near a metropolitan area or other market;
8. Access to utilities;
9. Adequate transportation infrastructure.

The second criterion means that the marina should be as close as possible to the waterfront. Of course a channel from the marina to the open water can be constructed if necessary. However, it is more convenient for users and it often saves construction costs when the channel is not needed. The marina should not be build close to functions that conflict with marinas. A protected natural area could be disturbed by a marina and a historic area could be damaged. Boats can be dangerous for swimmers at a public beach. However, WA Yachting Consultants points out that a beach next to a marina can be an attractive feature. As long as the exit of the marina is not close to the swimming area, the situation is safe for swimmers. Extra security measures might be necessary to protect the marina from unwelcome visitors (interview WA Yachting Consultants, 2005). A new built marina should not be farther away from a metropolitan area than 80 kilometres. After all it can be said that only very few sites meet these criteria. That is why it is necessary to weigh the criteria. The recognized values depend on the impacts of the deviation with the desirable criteria (Tobiasson and Kollmeyer, 1991).

Site selection is not only about the site itself but about the position of that site in the surrounding area as well. Especially in the case of a marina this is important since the direct and indirect surroundings form the sailing area. Since sailing and motor boating is the main aim of the marina customers the geographic position of the marina in the waterway network and the attractiveness of the waters are very important criteria for site selection. Chapter five contains an overview of the valuation of planning criteria by various scientists, marina operators and institutes.

On-shore considerations

A proposed site should meet the following requirements according to Adie (1984): 1) the actual quantity of the land, 2) the quality of the land, 3) its present use and 4) its future potential. The 'quality of the land' has many aspects. For example: visual attractiveness, polluted or unpolluted, need for drainage, stability, etc. Land that consists of 'made-up' land from offshore dredging may have lower load-bearing capacity because of instability.

On-shore considerations also include a desired mix of facilities in a marina. What the desired mix includes depends on the target group. Most 'sporty' sailors prefer good sailing conditions (good water and weather) above luxury facilities and entertainment. Families or couples who visit a marina basically to relax and enjoy tend to appreciate a higher standard of facilities and entertainment for adults and children. Lastly there is a target group that strongly appreciates the social function of a yacht club or union (interview KNWV, 2005). Tobiasson and Kollmeyer (1996) suggest a market survey to find out what facilities match with the target group. A commercial marina should build the

facilities that can generate the maximum rate of return on minimum investment. In terms of automobile parking they calculated that 0.6 to 0.8 parking spaces per yacht should be enough.

Offshore considerations

The basic things to do consider about offshore conditions are to:

- Determine the existing natural conditions
- Decide what engineering methods are useful to modify or overcome them.

An important fact to keep in mind is that dredging is often the major cost factor among engineering costs. Dredging costs will rise in case of very shallow waters, tidal estuaries, places with strong current or difficult seabed conditions. Tidal range is one of the offshore aspects with greatest influence on the design and site selection. That aspect determines what type the marina will be. Depending on the tides it could be a locked or tidal basin and the marina could have floating or fixed pontoons. Not only engineering issues should be topic of consideration, also sailing conditions are very important. They are assessed by the state of the tides, currents, prevailing winds and the overall climate. The climate can cause various problems ranging from ice formation to a lack of shade or hindrance by mosquitoes (Adie, 1984).

As a part of the marina design, the ratio of land to water has to be chosen. Tobiasson and Kollmeyer (1996) use as a rule of thumb: 1.25 water – 1 land. The share of water has increased over years because of the larger average size of yachts. Large were getting larger so more space was need for maneuvering and mooring.

Environmental considerations

Places crowded with recreational watercrafts such as marinas and small bays face environmental problems. Among these problems are: discharge of sewage from boats into the water, discharge of chemical additives used for onboard sanitation, leakage of motor fuel and oil, exhaust emissions, etc. Legislation is needed to minimize pollution. Law should prescribe onboard sanitation installations and facilities to empty them. Marina operators should play an active role in preventing illegal discharge (Seabloom et al, 1993). This protects the environment and their own marina. p. 79

2.5 Marketing and place promotion

2.5.1 Marketing

Marketing is a tool to inform prospective tourists about what an area has to offer. The ultimate aim is to make people visit the area or the tourist site. According to the World Tourism Organization 'marketing of tourism for a country or region is essential'. For that reason market planning needs to be part of the overall tourism planning process. Marketing involves four activities: setting the marketing objectives, formulating the marketing strategy, making and implementing the promotion program and providing tourist information services (World Tourism Organization, 1994).

Customer behavior and market segmentation

Besides a sound knowledge of the region there is information needed about competing alternatives. In the case of water sport the competing alternatives are other water sport facilities in the same waterway network. Ashworth and Voogd (1994; 47) formulated the following key questions that should be in mind: 'which choices do people have?' and

"How might people with a choice between several competing alternatives trade off the various characteristics against each other?"



Talking about trade-offs, different market segments (such as the recreation market or the housing market) make different trade-offs because every target group has an own perception and variant preferences. As Drogin said in a report about differentiating the experience of boaters: "Understanding the perceptions of water resource users towards impacts on their experience is a key to successful tourism and community development" (Drogin, 1993: 133). In case the expectations of users of a water sport area are not met or if their experience is unsatisfactory, people may move to another area or they choose another kind of recreation (Drogin, 1993). This demonstrates the importance of 'product positioning'. Or in other words: performing a precise and relevant segmentation of the market and sound research of potential competing alternatives within each segment. When knowledge about the alternatives is gathered, their potency and attractiveness for a target group is crucial. These two aspects determine the value that is given to an alternative. With help of this information new market-oriented spatial policies can be developed (Ashworth and Voogd, 1994).

Gunn mentions the importance of market segmentation as well. Never before in history travel promotion and growth has been so great, she says. Market researchers are discovering that travel markets are much more complex than they were considered. There is a growing variety of travellers, asking for specialized markets. Traveller's preferences became more dynamic. That is the reason why continuing market research is demanded (Gunn, 2002). Gunn points out Kotler's (1988) three conditions for market segmentation. First, the size of the segment should be large enough to warrant special attention. Second, within each group there must be sufficient similar characteristics to recognize these facilities as a group. Third, the segment must be worth the special attention.

James Burke and Barry Resnick (2000) developed a model with four tourism market segments (in: Gunn, 2002):

- Demographic segmenting: based on measurable personal characteristics such as age, income, family size, occupation, educational level, etc.
- Geographic segmenting: determines differences in travel preference, which is closely related to traveller location. Geographic factors influence decisions on destination development due to weather conditions and attraction development within given travel distances.
- Psychographic segmenting: groups tourists regarding their lifestyles, values, interests, activities and personalities.
- Behaviouristic segmenting: divides groups with similar buying habits. This includes travel habits and preferences, purpose of travel and benefits sought. Behaviouristic segmentation is interesting for planners as well as promoters.

This segmentation is helpful in planning tourism development only when the model is fit to the local situation. Information from professional tourism market researchers is essential. Psychographic segmentation has very different results in China and The Netherlands. The Netherlands the water sport lifestyle has a long history while in China it is just starting. Segmentation based on income (demographic) is very clear in China. More specific information about this topic is found in chapter seven.

The concept 'quality tourism' targets a specific group that is searching for high quality facilities and is willing to pay a high price. In other words, quality tourism refers to tourist attractions, facilities and services that offer 'good value for money'. At the same time they protect tourism resources and attract a target group that will respect the local environment and culture. Quality tourism is gaining popularity because it can be very successful in terms of marketing and local residents can benefit from it together with their environment. Since it is about good value for a reasonable but high price, it is not very complicated to attract the preferred target group (World Tourism Organization, 1994).

Targeting

Market targets are described by number of tourist arrivals, average length of stay, nationality or region of origin and other characteristics. The attracted target group should match with the facilities and the kind of water sport offered (World Tourism Organization, 1994). The marketing strategy will be based on whether the marketing will be aimed at tourists with general interests or directed to specific types of tourist markets.

The market can be divided in primary, secondary and opportunity markets. The primary market consists of the target groups with the best purchasing potential. That is the group with the greatest demand. The secondary market is a target group with less demand and for that reason it is more risky to operate on such a market. An opportunity market is that part of the market that is not developed yet. There is hardly any demand at the moment but this target group offers an opportunity for the future. It depends on the marketing strategy which parts of the market are targeted. This is of special interest for a new form of tourism such as water sport in China. China's short-term and long-term future seems even harder to predict than the future in developed countries. That is why the best chances for water sport development on short-term are likely to be found in the primary market. That means targeting at expatriates, foreign tourists and Chinese high class. The marketing strategy should be related to long-term as well as short-term development. It has to be reviewed and updated on regular basis, particularly in China (World Tourism Organization, 1994).

The marketing strategy also includes marketing techniques. An important question is to whom the promotion is directed: to tour operators, directly to the consumer, or a combination of these. The great majority of tourists find their own way to water sport facilities so it makes sense to focus promotion activities directly on potential users. Marketing activities vary over time. Timing or priority scheduling of promotion in certain regions or areas could be necessary to achieve marketing objectives. Timing may depend on tourism development projects. In order to introduce water sport in regions where it is pretty much unknown, tourist information offices should provide information. Of course tourist information services should be available before and after arrival at the destination (World Tourism Organization, 1994).

2.5.2 Place promotion

Promotion is an instrument to sell products, including towns, regions or places. It does not stand on its own; it is one marketing tool among others. In an even wider context promotion can be seen as a part of place management.

The place

Places ask for a special kind of marketing for they are extraordinary products. Ashworth and Voogd describe a place both as a container or stage for activity-based products as well as an entity or product in itself. A place is used as a container when the activity takes place on that location for no special reason, just because there is space. A place serves as a 'stage' when the place adds value to the activity. It is a stage with a décor that surrounds the activity with nice scenery. When these characteristics are related to promotion, it becomes clear that place promotion may be the selling of a selected combination of facilities or the selling of the place as a whole.

Places are locations and areas at the same time. The place product as promoted is not always the same as the place product consumed. Additionally, the place consumed by tourists or residents is not always the same as the place promoted and bounded by the authorities. Places are promoted and consumed on different scales and within different hierarchies. Shadow effects from promotion on one level may be positive or negative for another place in the hierarchy.



'Product development': a condition for promotion

Customers weigh alternatives before they make the decision 'purchase' or 'non-purchase'. The decision depends on the quality of the product as well as the quality of competing products. The greater the difference between alternatives, the less effective promotion of the place will be. Promotion can be used to influence the purchasing behaviour of the consumer. This behaviour can be explained in five stages:

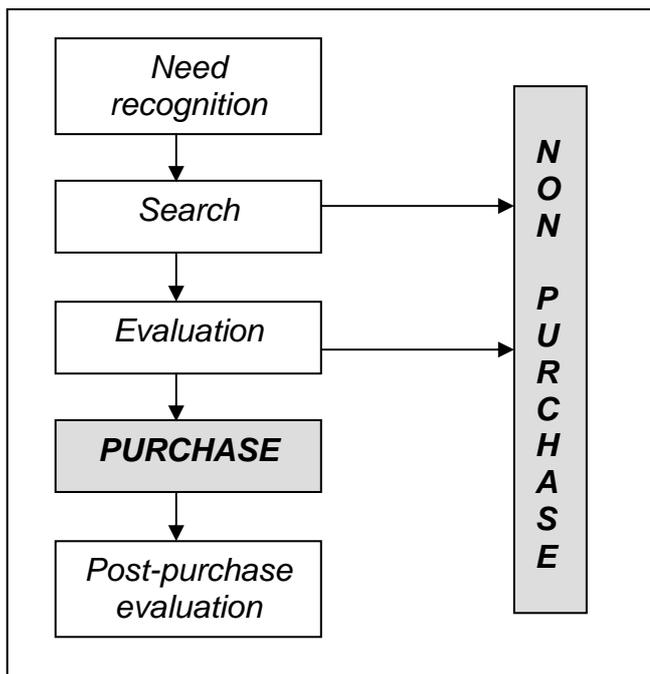


Figure 3: A purchase decision-making path (Ashworth, 1994)

In the first stage a potential purchaser defines an existing need or problem. This person wants to solve the problem or satisfy his or her needs. In order to do so he will start searching for a solution or product. Usually there are several alternatives from which the customer can choose. He will evaluate based on his preferences. The before mentioned actions are likely to be repeated when people are hesitating or when preferences change. Finally it comes to purchasing or non-purchasing. In case the customer bought a product or made use of a facility he will evaluate his satisfaction. Organisations should always ask their selves: 'What business are we in?' And: 'Who is our customer?' And: 'Why is the customer satisfied or why not?' (Ashworth, 1994).

Products that are poor in quality should not be promoted. What is bad is better concealed than shown. In such a situation it is better to put effort in product improvement than in promotion. Product development is strongly influenced by the image of the product. In other words: it is important what the potential buyer expects from the product. Yachting for example is regarded as a high-class activity in some societies. Actually it does not have to be like that, it can be accessible for middle-class. In case that is the fact, the middle-class should be informed about this by means of promotion. In short three characters of products can be described (Ashworth, 1994):

1. Poor facilities with a favourable image. In this situation product improvement is required instead of promotion. The undeserved good image must be preserved until the product is actually improved.

2. If good facilities are combined with a favourable image marketing and promotion are hardly needed. Everything that goes beyond maintaining this situation would be a waste of resources.
3. Good facilities with an undeservedly poor or non-existing image. In case of an undeservedly poor image promotion is required to correct the image. When there is no image at all, promotion is needed to create it.

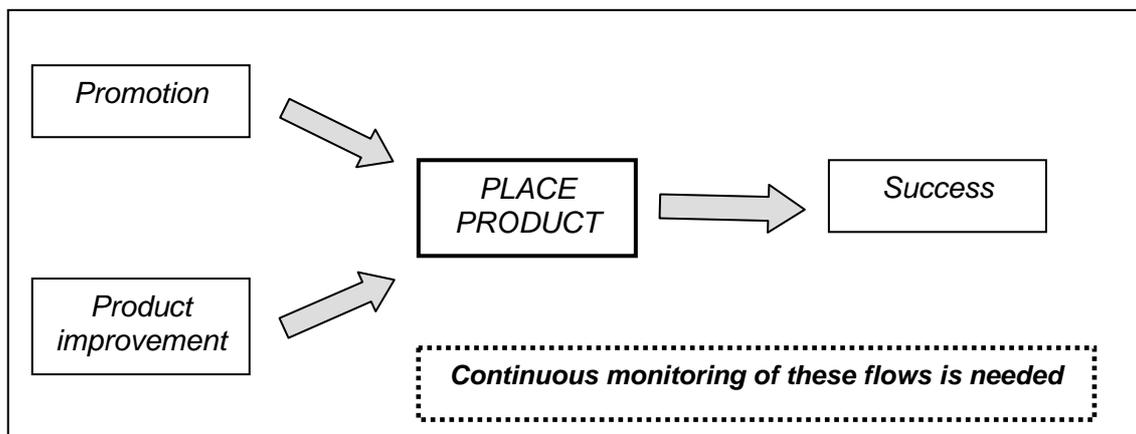


Figure 4: Inputs and output in the process of place promotion (own creation).

Continuous monitoring of promotion, product improvement and the success of the 'place product' is essential because preferences of customers and competing products change.

Communication and promotion

Users of a place have an enormous store of information about a place in mind. This can be geographical information, feelings, expectations, etc. This information is not necessarily collected by experience; people could have it at second hand. Promotion is a special form of communication for it has the goal to influence the behaviour of the target group. A crucial part of communicating information about places is about the transmission of place-images. This means the bridge between images in people's minds and reality.

The kind of medium used for promotion depends on the receiver and the place to be promoted. In the most ideal situation the medium provides the perfect bridge between the promoted place and the potential customer. The medium of communication is not neutral. It is selective because not anybody has access to all media. Secondly the effect of media is different: compare sound with film & sound. An important question is: 'where do individuals get their information from to shape their images of places?' Furthermore, it is interesting to know how people interpret received place-images. This is important because information should not only *reach* customers, the aim is they *actually receive and accept* it. A proper answer to these questions can say something about the effectiveness of promotional policies (Ashworth, 1994).

2.6 Conclusion

The first sub question mentioned in chapter one was:

What are the main concepts and approaches regarding spatial planning of water sport facilities mentioned in the international literature?



Spatial planning of water sport facilities is a form of tourism planning. Depending on the situation and the aim, planning can have different accents. For this research the economic approach and the cultural approach are most suitable.

All negative impacts: economic, socio-cultural as well as negative environmental impacts should be a starting point for the design of legislation and control of water sport activities. In China the development of legislation regarding water sport is in an early stage. This means there are opportunities to include knowledge about potential negative impacts. On the other hand, positive impacts of water-based tourism can be stimulated by means of legislation.

The market consists of various target groups. Some have very good potential (primary market) others might have less potential or are promising for the future. In the market strategy is decided which groups will be targeted. The marketing technique describes how to make the customer purchase. Place promotion is a marketing technique. The place is important in the marina business. The surroundings of a marina can make the place attractive and successful. Nice scenery adds value to the 'product' marina. Promotion of places is different from promotion of products. Place are no objects that can be sold or bought. It is something that appeals to people and something one could enjoy during a visit.

Chapter 3:

Water sports in The Netherlands

The development of the Dutch water sport industry is studied in order to show what the history of a successful water sport industry can be. Moreover, this chapter gives an overview of the contemporary 'water sport world' with its customers, its water sport areas, its economic impact and its specific legislation.

3.1 The history of recreational boating

This paragraph contains a short overview of the Dutch water sport history. The long history of water sport has formed the basis for the contemporary Dutch yacht building industry and recreational boating. Without this background the current situation would probably be less developed.

Yachting as a leisure activity started in Europe in the 17th century. At that time the Dutch were a mighty sea power. Larger ships replaced older small ones; these became vacant and were used as pleasure crafts. In the beginning only royal families were able to sail those ships, later other people enjoyed sailing in small boats on rivers, canals and open waters. Racing happened on incidental basis as a private organized activity. The first yacht club in the Netherlands was established in IJmuiden in 1848 (DHV et al, 2003).

In England king Charles II introduced yachting. He became familiar with the phenomenon during his exile in Holland. When he re-ascended the English throne in 1660, the city of Amsterdam presented him with a 20-meter pleasure yacht. Charles II had more yachts built and in 1662 he raced two of them on the Thames from Greenwich to Gravesend and back. Yachting became fashionable among the wealthy and nobility, but at that time the fashion did not last. The first yacht club in the British Isles was not founded before 1720 at Cork, Ireland. It was an unofficial coast guard organization, which became the Royal Cork Yacht Club in 1828. Yacht racing began in a more organized way on the River Thames in the middle of the 18th century. The first English yacht club was founded at Cowes on the Isle of Wight in 1815 and the Royal Thames Yacht Club was established in 1830 (DHV et al, 2003).



Figure 5: Pleasure yacht presented to Charles II (DHV et al, 2003)

In North America yachting was introduced in the 17th century by the Dutch in New York and continued when the English gained control. Sailing was mostly a leisure activity during that period. The first American yacht club, the Detroit Boat Club, was formed in 1839. In the beginning of the 20th century yacht racing was so popular and widespread in Europe and America that the International Yacht Racing Union was established to set racing rules and classes (DHV et al, 2003).

The number of pleasure crafts in The Netherlands grew slowly during the first part of the 20th century. From the 1950s commercial vessels and fishermen's ships were converted into recreational ships for charter or private use. In the beginning of the 1960s there were about 5000 yachts in the Lake IJsselmeer and the 'Randmeren' area (WA Yachting Consultants, 2003).



3.2 Contemporary water sport regions in The Netherlands

Target groups described before choose different water sport regions with specific characteristics that fit to their preferences. In The Netherlands there is a great variety of water systems and types of marinas.

Various water systems

Compared to other European countries, The Netherlands have a wide range of water sport areas. Within the small country numerous lakes, rivers, estuaries and coastal areas are found. This is attractive to locals and foreigners (Van den Bossche et. al, 1999). The Royal Netherlands Yachting Union even says that the variety is crucial for the success of the Dutch water sport industry (interview KNWV, 2005). On map 1, small marinas are marked with a red dot and large marinas, larger than 5 hectare, with a red triangle. A large version of map 1 can be found in appendix 1. The overview shows that marinas are concentrated around the small lakes in the North of the country (province of Friesland), around Lake IJsselmeer and Randmeren, in the lake area in the center of the country and the delta areas in the Southwest.

Province of Friesland

The popular water sport area in the North of the country consists of an extensive network of small and larger lakes, canals and small rivers. There are many sailing routes in the region and the large Lake IJsselmeer and the Wadden Sea are relatively close by. The area is very suitable for small and medium sized sail yachts. Besides the suitable waters the region is also famous for its beautiful landscape and historic towns and villages.

North Sea coast

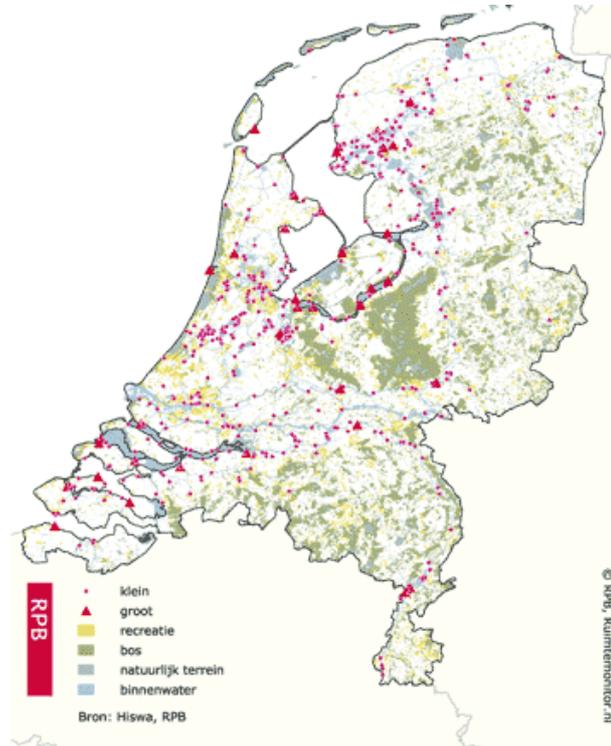
Compared with other regions, the coastal zone does not have many marinas. One of the reasons is that the conditions at sea are only suitable for seaworthy yachts with experienced crew. At sea there is more wind, higher waves, more currents and tidal movement. The situation is different at the Wadden Sea, the water between the islands to the North of the country and the main land. The water is shallow and there is great influence of the tides which means currents can be strong. When the tide is low parts of the sea floor stand clear of the water.

Province of Zeeland

36% of the total water surface in The Netherlands is found in the province of Zeeland. This delta region in the South West of the country has large inland waters and estuaries. The conditions are good for sailing, driving motor yachts and surfing. There are about 50 marinas and 12,000 berths (website Footzy, 2005).

Lake IJsselmeer

Lake IJsselmeer is situated in the middle of the country between two large dams that are clearly visible on map 1. In earlier days, it used to be part of the sea. Nowadays it is the largest inland water area in The Netherlands with a surface of approximately 1100 square kilometers. The huge freshwater surface with an average depth of 4.4 meters is one of the scarce areas that are very interesting for



Map 1: Locations of marinas (website RPB, 2004)

regatta sailors (Boers, 2005). However, the lake is popular among recreational boaters with all kinds of boats. The historic towns at the East and West shores are popular for sightseeing.

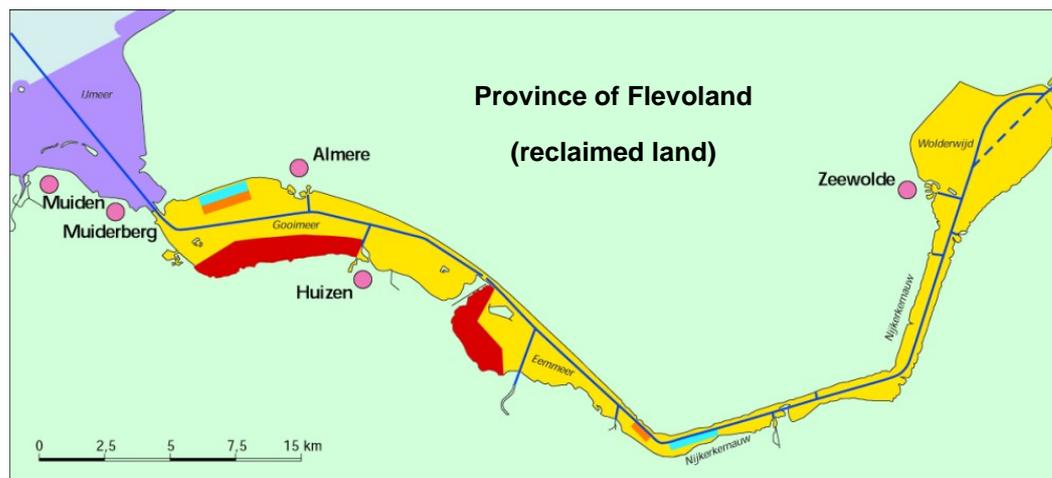
Randmeren area

Another type of water system is found at the 'Randmeren' that are situated around the province of Flevoland, to the Southeast of Lake IJsselmeer. Map 2 shows a better view of the region. In terms of accessibility the area is attractive because of the central location in the country. To the North side of the water the land was reclaimed in the 1960s. All the towns and villages are newly built while at the South side historic and modern architecture are combined. The total number of berths in the Randmeren area and the Lake IJsselmeer area (appendix 4) is 34,500 in 200 marinas (WA Yachting Consultants, 2004).

Rivers

The last water system consists of the numerous large and smaller rivers crossing the country. In general rivers are not as suitable for sailing yachts as lakes because of the limited available space for cruising. The majority of the boats in marinas at the riverfront are motorboats.

Marinas located in between different water systems offer the possibility of navigating on different types of water from the 'home marina'. Marina Makkum, discussed in chapter four, is a good example of such a location. The marina is situated in the lake area of the Province of Friesland, close to Lake IJsselmeer and the Wadden Sea. In such an area recreational boaters can choose from several different water systems with different characteristics.



Map 2: View of a part of the 'Randmeren' area and allowed cruising speeds (website RWS IJG, 2005)

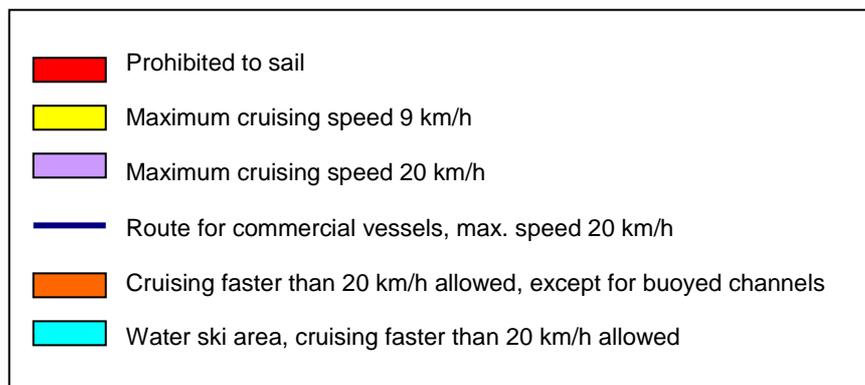


Figure 6: key to symbols on map 1 (website RWS IJG, 2005)



Marinas

There is a great variety in marinas in terms of size, operation, facilities and location. Although there are 843 marinas in The Netherlands (October 2004) still a shortage in some regions exists. The greatest shortage of moorings that are rented for a season or a year is around Lake IJsselmeer and in the delta of the province of Zeeland. There is enough demand to create new marinas around the cities of Amsterdam, Almere or Muiden. The Royal Netherlands Yachting Union states: "If a new marina is built in one of these regions, it will be immediately fully occupied." These regions are attractive for sailing and well accessible because of the central location and good infrastructure (interview KNWV, 2005).

Size

The Spatial Planning Bureau (RPB) classifies marinas according to size: small marinas have a surface smaller than five hectares and large ones have an area of five hectares or more. From the map in appendix 1 it is clear that small marinas are often located along rivers and small inland waters and marinas over five hectares are mainly located at large open waters (website RPB, 2004).

Operation

Marinas can be classified according to their operation method. There are commercial enterprises, non-profit marinas owned and/or managed by the municipal government and non-profit organizations managed by a water sport union (DHV, 2005). In 2000, water sport unions managed 54 percent of the marinas; the remaining 46 percent have an operator who was either commercial or municipal. Neither commercial marinas nor non-profit marinas get financial support from the government. They need to build and operate the facility themselves. The only existing supports are loans for construction of the facility and in special occasions financial support on project basis. The non-profit marinas, managed by water sport unions, provide services for reasonable prices. In addition, they influence the pricing of commercial marinas due to competition. Many people can afford participation in water sports thanks to the existence of the non-profit marinas. This is of crucial importance for the success of the Dutch water sport industry. In the UK there are more water sport unions than in The Netherlands. Many are 'yacht clubs' that are very expensive, have an important social function and are in some cases only for very rich people. In Germany there are also many unions. Along the Mediterranean coast there are hardly any marinas managed by unions. Some are commercial and many are owned and managed by the local government (interview KNWV, 2005).

The average tariffs (including commercial and non-profit marinas) for the years 1997 and 2000 are included in the table below. These are average prices for renting a berth for one season. Tariffs can differ a lot for specific marinas. In the research of the Central Bureau of Statistics, tariffs are classified from less than 56 Euros for a small boat during the summer season up to more than 453 Euros for a large boat (CBS, 2005a).

Average tariff in Dutch marinas

	Summer 1997	Winter 1997	Summer 2000	Winter 2000
Small boat	185	140	225	No data
Large boat	430	325	475	No data

Figure 7: Average tariff in Dutch marinas, prices in Euros (website CBS, 2005a. Revised)

Facilities and services

The first category, regatta centers offer adequate, professional or world-class facilities depending on the target group and organized races. Those centers do not focus on entertainment but on training and education. Regatta Center Medemblik is a world-class regatta center that serves as a case study in this research (chapter 4). There are about one thousand water sport unions in The Netherlands (CBS, 2005b). In general water sport unions offer basic facilities to their members and short-stay

visitors. Marinas with this level of facilities form category two. In most cases there are sufficient water sport related facilities, a clubhouse and limited or no entertainment. The third category is the so-called 'full service marina'. They are distinctive because of the wide range of facilities and services offered. Besides the basic sanitary facilities these marinas offer shops for daily groceries, water sport shops and entertainment. In The Netherlands practically all of these marinas are commercially operated. Marina Makkum that is discussed in chapter four is a typical 'full service marina'.

According to recent statistics marinas are starting to offer more side activities. Between 1997 and 2000 the following side businesses grew: trade in yachts and equipment, maintenance and repair, exploitation of accommodation or campsites. The percentage of marinas with a sailing school declined: in 1997 29% operated a school and in 2000 only 9% did so (CBS, 2005b).

3.3 The Dutch and water sports

This section deals with the Dutch population and its interest in water sports. The main question to be answered is "Who are the Dutch yachtsmen and motor boaters and what are their preferences?" Furthermore, the developments of leisure time and leisure activities are pointed out.

Leisure time

In the period between 1975 and 2000 the amount of leisure time declined. In the year 2000 the average leisure time was 6,4 hours per day excluding personal time (figure 8). On average, people had 2.5 hours less free time per week in 2000 compared with 1995 and almost three hours less compared with 1975. This is the result of the fact that more people, especially women, work more hours per week and because all social classes spend more time sleeping. It is not yet clear why people sleep more (SCP, 2001a).

Development of compulsory, personal & leisure time

<i>Hours per week</i>	1975	1980	1985	1990	1995	2000
Compulsory (labor, study, household)	40.7	40.8	40.7	42.0	42.6	43.9
Personal (hygiene, eating & sleeping)	76.3	76.8	75.3	75.5	75.0	76.6
Leisure time	47.9	47.0	49.0	47.2	47.3	44.8

Figure 8, source: website SCP, 2001a

Leisure activities

The average Dutch spends leisure time on various activities as illustrated in figure nine. Some categories need some explanation; firstly 'social participation' reflects participation in political parties and unions, visiting religious meetings and doing voluntary work. The category 'going out' contains: visiting restaurants, sport matches, events, bars and snack bars, parties and participation in cultural activities. Outdoor recreation stands for fishing, hunting, walking and cycling. The amount of time spent on the activities also includes travel time to the location of the activity.



Development of time spent on various leisure activities

Hours per week	1975	1980	1985	1990	1995	2000
TV, radio & audio	12.4	12.1	13.5	13.2	13.2	13.0
Social contacts	11.3	11.0	10.0	9.8	9.3	8.5
Hobby, sport & games	5.1	6.4	6.8	6.0	6.0	6.4
Going out	5.4	4.8	5.4	5.5	6.0	5.9
Reading	6.1	5.7	5.3	5.1	4.6	3.9
Pets, gardening, etc.	3.1	3.0	3.2	3.1	3.2	2.9
Social participation	2.3	2.3	2.5	2.5	2.6	2.1
Relaxation	1.3	1.0	1.1	1.2	1.3	1.3
Outdoor recreation	1.0	0.7	1.1	0.8	1.0	0.7
Total	47.9	46.9	49.0	47.2	47.3	44.8

Figure 9, source: website SCP, 2001b (revised)

Almost half of the Dutch population (48%) spend part of the leisure time at or nearby the water. 29% Of the Dutch over the age of fifteen sail at least once a year during a day trip or holiday. The weather can have a significant impact on the exact numbers (website HISWA, 2004a).

Recreation of the Dutch on and nearby water (16 years and older)

Recreation activity	Percentage per year
Sails at least once a year (day trip or holiday)	29 %
Stays at least once a year at waterfronts	19 %
No recreation on or nearby water	52 %

Figure 10, source website HISWA, 2004a (revised)

Target groups for the Dutch water sport sector

The Royal Netherlands Yachting Union (KNWV) describes target groups based on the kind of yacht people use (size and with/without accommodation), owned or charter yacht and classification by income. There are boat owners in practically all income classes. In the top income segment the percentage of yacht owners is higher than in the other categories. Most of the boat owners with a low income are passionate boaters (interview KNWV, 2005). Besides the categories mentioned by the Royal Netherlands Yachting Union it is crucial to know where customers are from and how far potential customers are willing to travel. In general there is a significant difference between Dutch and German boaters with their home marina in The Netherlands. The Germans accept a fairly long travel time: about three hours single way. Dutch people are not used to that because commercial marinas and water sport unions can usually be found fairly close to the place of residence since they are located all over the country. Most local recreants go yachting for one day, while foreigners stay on average more than one day.

Preferences and satisfaction

Important factors for choosing a water sport area are: water quality, quietness, nature and places to stay. Aspects people like best about yachting at the Wadden Sea for example are: enjoying open

space, nature and the experience of the tides. Furthermore, walking and cycling are highly appreciated side-activities. On the other hand, factors that make an area unattractive are: overcrowding, shallow waters, water plants and lack of variation in sailing routes. Although hindrance by commercial crafts, crossing large waters and paying fees are negative elements of yachting, these factors are not crucial in the tourist's choice of a water sport area. Of even less importance are waiting times for bridges and fuel stations (WA Yachting Consultants, 2003). The Royal Netherlands Yachting Union (KNWV) protects the interests of recreational boaters in The Netherlands and they handle their complaints. Although most boaters do not complain about waiting for bridges and locks, it is the most frequently heard complaint (interview KNWV, 2005). People also complain about bad behaviour of other boaters who cause big wake waves or make noise (interview KNWV, 2005). The KNWV and the Dutch consultancy company 'WA Yachting Consultants' found that in general boaters are satisfied about the available amount of berths in marinas. During the peak season there is a shortage of berths for short-stay visitors in the 'Wadden Sea region'. That region is very popular for multiple-day trips. However, not many people choose their home marina at the Wadden Sea because of the long distance to their place of residence. Furthermore, water tourists wish to see more moorings (without facilities) at the countryside (interview KNWV, 2005). The majority of the people is satisfied about current sanitary facilities and 90 percent are satisfied about possibilities for grocery shopping. There are no regions in The Netherlands with a lack of bars and restaurants. Eighty percent of the respondents state that they are pleased with places of interest and cultural-historic heritage in the water sport areas they visited. Lastly, 84 percent think there are enough areas of natural beauty in water sport regions (WA Yachting Consultants, 2003). In general people are satisfied about the Dutch water sport areas (interview KNWV, 2005).

Customer behaviour and facilities

Boaters spend more and more time of the day on-shore instead of aboard the yacht. They spend three to four hours on average on the water and a little more time on land: on average 3.8 hours a day. Popular activities on land are cycling, walking, grocery shopping and visiting cafés (BRTN, 2000). The decision to go yachting is often taken very short before departure. The most important reason for that is the dependence on the weather (SEO, 1995).

The interests of the sailor and the marina he chooses are closely related to accepted travel time. Regatta sailors for example search for waters with the right conditions and a marina with advanced training facilities and maintenance service. Since there are just a few regatta centers in the country, not everybody finds such a marina in his place of residence. That is why regatta sailors tend to accept longer travel distances. On the other hand there are tourists that just want to relax during their stay at the marina and on the water. They do not need the special facilities regatta sailors ask for but they want to have entertainment, shops and restaurants. This group of 'relax-boaters' consists mostly of families and elderly. This group can find suitable marinas all over the country so in most cases the travel time will be limited (interview KNWV, 2005). Lastly, there are recreational boaters who prefer a water sport union with a strong social function. They meet other members in the clubhouse and often volunteers do the operation of the marina. Most non-profit marinas operated by water sport unions do not have many side activities or luxury facilities. There are thousand water sport unions in The Netherlands so travel distances to the marina are likely to be relatively short.

Promotion

Promotion is not a big issue for non-profit marinas and water sport unions. Since they keep prices as low as possible many recreational boaters are interested in these relatively inexpensive marinas. Because of social ties many unions have a constant group of members that stay with the same club. In that case promotion is no issue. Commercial marinas have a different position in the market. They need to be profitable and for that reason they usually ask a higher price. For most of them marketing and promotion is important to convince people that their marina is a good choice. Mouth-to-mouth



promotion works well since the world of yachting is relatively small. However, commercial enterprises need to do more to attract enough people to their marinas that are mostly more expensive. Customers and potential customers are reached via Internet, Tourist Information and advertisement (interview KNWV, 2005).

Trends in society

Social developments

Demographic change has its impact on yachting developments. The number of elderly is growing and this group has a lot of time to spend on recreational boating. Their health and physical condition remains better compared with earlier generations, their average income is higher and this group is gaining leisure time. When people get older they tend to change their sailing yacht for a motor yacht because driving a motorboat requires less physical effort (interview KNWV, 2005). Another consequence of social developments is the fact that the traditional 'water sport family' disappears. Children do not want to join their parents on a yachting holiday for as many years as children used to do in the past. Nowadays the youth is interested in fast water sports or other exciting sports and children have greater influence on the choice of the holiday destination (interview KNWV, 2005).

Trends in recreation & tourism in general

The beginning of this section dealt with the decline of the average amount of free time, in particular in households with double income. In terms of their financial situation, these households are an interesting target group for the yachting industry. However, compared with other sports, a relatively large amount of time is required to take part in water sports, which is difficult for busy double-income couples. Other curbing developments are the competition with other recreation activities, especially those that attract youth (Stichting Recreatie, 2001). Research points out that The Netherlands suffers from competition with other water sport areas in the world, mostly from regions with a better climate (Stichting Recreatie, 2002).

Specific trends in water recreation

From 1985 until 2000 the growth of multiple-day trips on a yacht with accommodation (in Dutch: *toervaart*) was about two percent per year. The expected average growth of multiple-day trips on a yacht with accommodation from 2000-2025 is 1% per year. This is based on trends in the society (SRN, 2000).

From recent research and the experience from Marina Makkum (see chapter 4) it becomes clear that there is a greater demand for larger yachts with more facilities and safety. People with larger yachts prefer larger water surfaces. They move from inland waters to large lakes or coastal areas. Due to technological improvements such as GPS (Geographic Positioning System) sailing and motor boating have become easier and safer (Stichting Recreatie, 2002). Also in the charter sector larger ships with captain and better facilities have gained popularity. The sector is in temperate positive development. An interesting fact is that tourists using facilities in this sector are mainly non-recreational boaters. Via this branch they experience water sport and might become enthusiastic (Stichting Recreatie, 2002).

3.4 Planning & legislation regarding water sport in The Netherlands

Several government departments are in charge of planning, legislation and control of water sport facilities and activities. This paragraph describes the government departments that are closely related to spatial planning issues.

Planning

The Ministry of Housing, Spatial Planning and the Environment designs integrated policy including all sectors involved in planning issues. The ministry writes a National Spatial Strategy (Nota Ruimtelijke Ordening) that contains the spatial planning policy. The National Spatial Strategy reflects the basic ideas of the spatial policy. The vision of the current document regards the developments between 2005 and 2020 with a preview of the period until 2030. One level lower in the governmental hierarchy is the provincial level. The 'Structuurplan' (meaning: spatial structure plan) of the provincial government is a rough development plan for the province that gives a general view of the development within the province and in relation with surrounding areas. The plan could show for example the future infrastructure network, the direction of urban developments and the areas dedicated for recreation and nature. The Ministry of Housing, Spatial Planning and the Environment approves the provincial development plan. The lowest administration level is the municipal government. The municipal authority drafts a zoning plan that is based on the less detailed provincial development plan, which needs to be approved by the provincial government. In the zoning plan all land is reserved for a specific function, for instance: residential area, industrial, commercial, recreation, nature, etc. Future developments are included in the plan as well. According to official regulation the zoning plan must be updated at least once in ten years (website VROM, 2005).

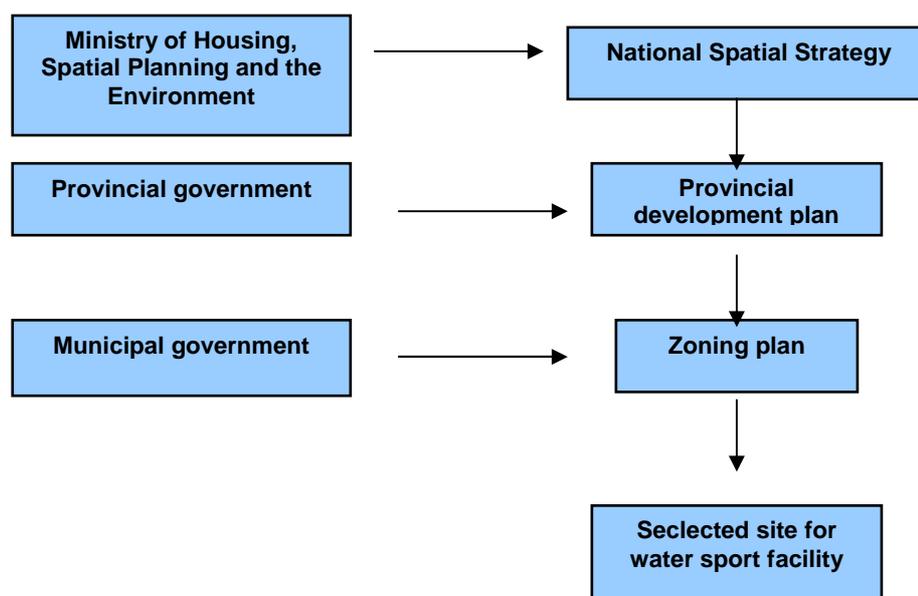


Figure 11: Government organizations to approve development of a selected site (own source).

In case an individual, a company or the government wants to develop a water sport facility on a certain site, the plan needs to fit in the zoning plan of the municipal government. In case the plan conflicts with the zoning plan, there is a possibility to change the zoning plan in case there is no conflict with the provincial development plan and if the municipal authorities agree with the alteration. Indirectly all site selection issues should fit in the National Spatial Strategy of the ministry and the 'Spatial structure plan' of the provincial government and the spatial planning document of the municipal government in charge.

Some provinces pay much attention to water sports in their spatial development plans, others less. It depends on general priorities, the impact of water sport on the regional economy and role of water sport in the identity and marketing of the province. The province of Zeeland (delta region in the Southwest) wrote a 'Water sport action plan 2002-2005'. Zeeland values water sport highly because of the significant impact on the regional economy. The primary aim of the plan is to



strengthen the water sport image of the region. The secondary aim is to focus on the economic importance of the sector and to stimulate development of the water sport industry. In order to develop the sector as desired the province works on product development, infrastructure improvement, marketing and promotion (Province of Zeeland, 2002). These tools were discussed in chapter two as well. Another example of a detailed water sport development plan is the 'Agenda Recreation and Tourism 2004-2007' written by the province of North Holland. This document is about increasing the capacity of berths, improvement of the waterway network and five key projects including marinas, problems at a junction of waterways and a new 'aqua campsite' (Province of North Holland, 2004).

Legislation & control

Besides the earlier mentioned Ministry of Housing, Spatial Planning and the Environment, the Ministry of Transport, Public Works and Water management (Ministerie van V&W) is also closely related with water sport issues. This ministry is in charge of safety, maintenance and control and in some regions they deal with planning issues. Within the ministry of V&W the bureau 'Rijkswaterstaat' (RWS) is in charge of implementation of policies. Furthermore, RWS monitors and maintains waterways, water works and water quality. For the Lake IJsselmeer area RWS is involved in a spatial planning development project (website RWS, 2005).

There is an extensive set of rules including right-of-way, maximum allowed cruising speed, marks and licences for water sports. Special regulation is designed for fast motorboats, water-skiing and kite surfing. The 'Environment Law' contains a 'Royal Decree marinas'. The law is valid for marinas with at least ten berths. The chapter about environmental legislation is valid for marinas with less than 500 berths. The law prohibits hindrance caused by noise or odour and soil pollution. Depending on the properties of the marina there must be facilities for collection of oil, wastewater, dangerous chemicals, bilge water and rubbish. It is forbidden to charge money for using the waste facilities in the marina (website Advies Overheid.nl, 2005). The 'water police' controls observance of the before mentioned law and regulations (KLPD, 2005).

Trends in policy

The Dutch government pays more and more attention to water recreation. There is a so-called re-discovery of cultural heritage related to water. The government as well as non-profit organisations invest in water sport. A lot of effort is put in the development of the 'basic waterway network for pleasure crafts'. There are several recent memoranda related to water and water recreation such as: 'Space for water' ('Ruimte voor water' 2000), and 'Green in and around the city' ('Groen in en om de stad'). The last document is about creating more green space and water in and around the city. These memoranda contain opportunities for water recreation. At the same time there are some topics in the national policy that deserve more attention than they actually get. Accessibility of waters and shores should be improved and the government should make the most of opportunities to develop water recreation (Stichting Recreatie, 2000).

3.5 'Economic impacts of The Dutch water sport industry'

This paragraph is about the impact of the water sport industry on the economy. The Dutch water sport sector is compared with other European countries and with other economic sectors in The Netherlands.

The Dutch water sport industry within Europe

Compared with other European countries The Netherlands have a great number of marinas. In 1997 the country even had the highest number of berths in Europe.

Key figures water sport industry in Europe

	<i>Marinas and ports</i>	<i>Berths/moorings</i>	<i>Number of yachts per 1,000 inhabitants</i>	<i>Employees in water sport industry</i>
Belgium	?	5000	2.3	?
Denmark	500	6,000	68	3,100
Finland	1,700	80,000	143	2,300
France	770	177,000	15.9	30,000
Germany	2,000	?	4.5	29,000
Greece	130	7,000*	10.2	1,700
Italy	45	1000,000	14.8	65,000
Norway	300	?	168	7,500
Sweden	> 1,000	?	143	4,000
The Netherlands	1,200	250,000	100	13,530
United Kingdom	355	206,000	25	25,000

Figure 12: source: Van den Bossche et al., 1999 (revised)

* only berths, no moorings

The number of marinas and ports is very high in Scandinavia and in The Netherlands. According to Van den Bossche et al. the number of marinas in Germany is calculated in a different way or simply overestimated. From the figures above it turns out that The Netherlands have most berths and moorings of all European countries involved in the research. In terms of employment high numbers are found in Germany, France and Italy in particular. The Netherlands scores moderate on that aspect (Van den Bossche et al., 1999).

Economic impact

In the Netherlands there are approximately 3860 enterprises within the water sport industry. Most of them are doing core business in retail. Only 20 percent of the companies produce yachts. 40 Percent of the enterprises provide services in marinas or related to marinas and another 40 percent are in water sport related trade (Van den Bossche et al., 1999).

Direct economic impact of the Dutch water sport industry

In millions of Euros	<i>Production Value (PV)</i>	<i>Intermediary purchases</i>	<i>Added Value (AV)</i>	<i>AV as part of PV</i>
Yacht building > 24m	168	118	50	29%
Yacht building < 24m	385	237	148	39%
Wholesale trade	169	56	112	67%
Retail business	172	89	77	48%
Marina related services	160	83	94	50%
Ship related services	45	18	27	61%
Pleasure cruising related services	101	57	44	43%
Total	1218	665	552	46%

Figure 13: source: Van den Bossche et al. 1999 (revised)



The table shows direct economic impacts. Turnover, employment, added value and other effects that are created within the sector generate direct impacts. The total production value of the industry is estimated at 1.2 billion Euros and the total added value is more than half a billion Euros. In terms of production the yacht building industry is the largest sector within the water sports industry. Yacht builders have a relatively high percentage of intermediary purchases as part of the production value. The main part of the intermediary purchases consists of accessories and parts of the yacht. As a result the added value is lower. One of the reasons for this is the fact that many yachts are custom or semi-custom built and have many expensive accessories. Hundred percent of the yachts larger than 24 meters are being exported (Van den Bossche et al., 1999).

Maritime related employment consisted of 14,200 full time jobs in 1997. The largest companies are found in the category 'production of yachts > 24 meters'. They employ 127 persons on average (full-time jobs on a yearly basis). In the retail and service sector each company employs 2 or 3 persons on average (Van den Bossche et al., 1999).

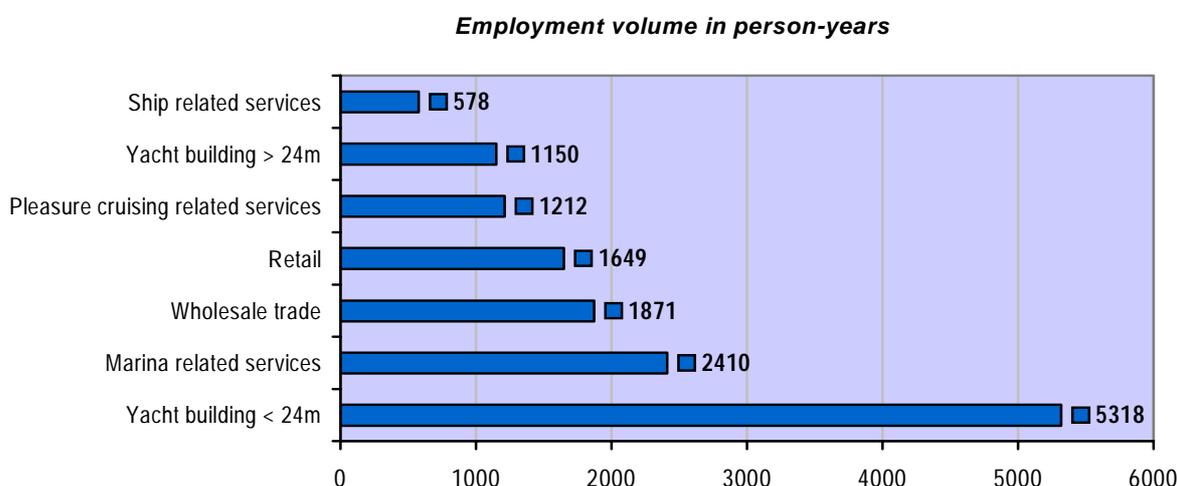


Figure 14: Employment volume water sport industry in person-years
source: Van den Bossche et al. 1999 (revised)

According to research by Van den Bossche et al. the water sport industry is of significant economic importance. The sector is comparable to the inland shipping sector in terms of employment, production value and added value. The figure on the next page shows the production value of the water sport industry and five other sectors.

Comparing water sport with other sectors

Agriculture	1.45 billion
Water sport industry (direct economic impact) (1997)	1.23 billion
Retail books, magazines etc. (1995)	1.14 billion
Inland shipping (1995)	1 billion
Recreation facilities with accommodation (1997)	0.91 billion

Figure 15: figures in Euros. Source: Stichting Recreatie, 2002 page 95

Economic spin-off

Besides the direct impacts that are discussed earlier the water sport industry generates indirect economic impacts as well. That means economic relations with other sectors, or in short: economic

spin-off. The most well known example is business with suppliers. In 1997 the indirect production value was 0.55 billion Euros (Stichting Recreatie, 2002). The figures mentioned in this paragraph are all from 1997. The HISWA, an organisation to protect interest of companies in the water sport industry, provides figures from 2002. The total number of companies in water sport business was 4100. The direct employment was 15310 person-years compared with 14,200 in 1997 and the production value was 1.49 billion Euros compared with 1.2 billion in 1997. The indirect employment was 6020 person-years in 2002 and the indirect production value 700 million Euros (website HISWA, 2004b).

Government involvement

In The Netherlands many marinas started with financial support from the government. By the time the cost component increased too much for the government, many organizations switched to commercial operation (interview DHV, 2005b). Nowadays non-profit marinas get hardly any financial support. Only loans for the construction of a new marina can be arranged and in some cases financial support is given on project basis (interview KNWV, 2005). Viewed from a higher level, the government invests in planning and construction of water recreation areas. Direct revenue is derived from bridge- and lock taxes, tourist tax and yachting permits (Van den Bossche et al., 1999). Indirectly the government earns money via income tax and VAT.

The Royal Netherlands Yachting Union says there are several points that deserve more attention of the government. Firstly, maintenance of waterways is not sufficient since there are many barriers. Secondly, the part of the waterway network open to pleasure crafts is restricted. On many small canals and creeks it is not allowed to sail although there are good possibilities. Thirdly, in the opinion of the Water sport Association there are opportunities for 'recreational joint use' (*recreatief medegebruik*) in protected natural areas. Especially for the small water sports (canoeing, small boats, windsurfing, pedal bikes) there are chances that should be taken. Lastly, zoning in place and time should be used as a tool to fight crowdedness (interview KNWV, 2005).

3.6 Conclusion

The Netherlands have a long and rich water sport history that still influences the contemporary water sport industry and the water sport lifestyle. Water sports are very popular in all income classes and 29% of the Dutch population sails at least once a year. There are roughly three categories of marinas serving target groups with different interests: regatta centers, full-service marinas and basic marinas operated by water sport unions. Among other factors, the Dutch water sport industry is successful thanks to the great variety and attractiveness of the extensive waterway network in the country. Important factors for choosing a water sport area are: water quality, quietness, nature and places to stay. In order to keep water sport areas attractive and safe the water police controls the waters regularly.

The water sport industry is of significant importance for the Dutch economy. The sector had a production value of 1.49 billion Euros a year in 2002 and generated 15,310 jobs in that year. The government does not give financial support to marinas but invests in maintenance and construction of waterways and water works. Besides this the government decides about site selection for new marinas and works on long-term development planning of water sport areas.

Recent trends in the society have their impact on the behaviour of recreational boaters. In general people are enjoying less free time, have a higher income and spend relatively more leisure time outside the house.

The second sub question mentioned in chapter one was:

Which characteristics of the Dutch water sport industry can serve as an example for the development of the Chinese water sports industry?



The proper spatial planning and specific legislation for water sport facilities, yachts and sailors can serve as an example for China. Besides that, it is recommended to create a network of water sport facilities within a water sport region. Another example is to provide a network of tourist facilities, consisting of water sport facilities and non-water sport facilities.

Chapter 4:

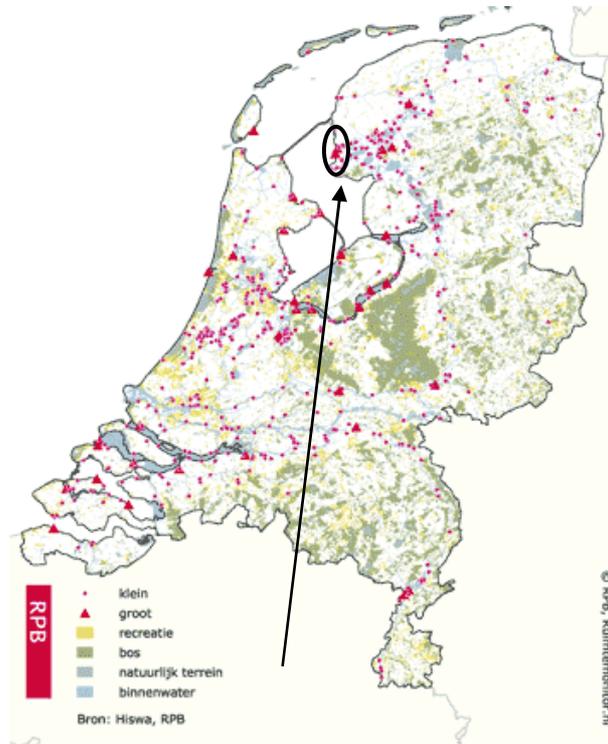
Dutch case studies

In this chapter, three different marinas will be discussed. These are distinct examples of what services marinas in The Netherlands can offer, what their appearance can be and where they can be located. There are no examples of water sport unions discussed because that concept does not seem to be suitable in China in an early phase of development. Since the development of the water sport industry in China is in a very early stage nowadays, it is not likely that Chinese individuals will set up a water sport club and start a non-profit marina for Chinese customers. Currently, non-profit water sport clubs are run by expatriates, for expatriates.

4.1 Marina Makkum

Location

Marina Makkum is located in the North of The Netherlands (map 3 and 4) on the West side of the province of Friesland. This is a strategic location because of the great variety of sailing routes. There is no hindrance by commercial vessels in the water sport area. Most of the yachts in the marina go to Lake IJsselmeer but there are many other possibilities, for example the small and large Frisian inland Lakes, canals, the Wadden Sea and its islands. All of these water systems have different conditions in terms of size, waves, water depth and crowdedness. Boats that return from the Wadden Sea find Marina Makkum to be the first marina at Lake IJsselmeer. For sailors who want to start their Makkum provides very good opportunities. The location is one of the success factors of the marina (interview De Boer, 2005).



Map 3: location of Marina Makkum in The Netherlands (website RPB, 2004)



Map 4: location of Marina Makkum in the province of Friesland. (website ViaMichelin, 2005)



Recreational boaters visit this area for its natural beauty, good facilities and sheltered waters. Besides the extensive network of sailing routes there are many tourist attractions and places to visit. The province of Friesland is famous for its cultural heritage. There are numerous historic villages and towns, museums and beautiful landscapes. The province has very good conditions for yachting and plenty of tourist attractions for a complete holiday. According to the municipal government, the conditions for recreational boaters would be even better when the waterways were deeper and bridges were higher (interview Eringa, 2005).

Spatial planning aspects

In the beginning of the 1990s the municipal government made a general zoning plan for the area where the marina is currently located. The area was labeled a 'tourist/recreation area' and therefore it was not complicated to develop the marina on this site. The local government owned a camping site in the area that they wanted to renovate and enlarge. The municipality and the initiator of the marina project combined their forces and the camping site and the marina were developed as one project (interview Eringa, 2005). For this project there was a subsidy available from the European government for development of tourist areas (interview De Boer, 2005).

Accessibility of the location by car is good since the site is close to highway A7 that runs from Amsterdam via the province of Friesland towards Germany. The shortest route from Amsterdam to Makkum is 114 kilometers and takes about one or 1.25 hours by car (website ANWB, 2005). The marina is well accessible by car from the Northern part of Germany as well. This is important because half of the people renting a berth are German (interview De Boer, 2005). There are hardly any regular traffic jams in the province of Friesland. In the summer season a special bus runs from the village to the marina. During the other seasons only a few public busses per hour are available. Some busses require reservation. The closest bus stops are within 3 kilometers from the marina, which can be an inconvenience, especially for people with luggage.

The marina

The marina was constructed in 1991-1992. Nowadays this full-service marina has 580 berths, a supermarket, four restaurants/bars, a drugstore, a liquor store, a laundrette, a small swimming pool, a camping site of sixteen hectares, a sail maker (separate company), a ship maintenance and repair service, a petrol station, a yacht- and bicycle rental, a surf shop and a sports clothes shop. Furthermore, there is a bilge pump to pump out wastewater from ships and a collection point for old batteries, oil barrels, etc. (interview De Boer, 2005)



Figure 16: Bird view of Marina Makkum (website Marina Makkum, 2005)

On average, there are about 19,000 visitors per year including visitors without a yacht and visitors of the camping site. The annual occupancy rate of the berths for permanent use is 93-94 percent

(interview De Boer, 2005). That is good since interest group HISWA reports that at least 92 percent occupancy is required for a profitable commercial marina (interview Verbij, 2005).

Spin-off

There are several yacht builders and other water sport enterprises in Makkum. The marina attracted more business in the water sport industry. A yacht painter, broker, a yacht maintenance company and a winter-storage settled at an industrial area in Makkum (interview De Boer, 2005). The marina has a positive economic impact on the local economy due to spin-off in the tourist sector, water sport industry and local business such as supermarkets (interview Eringa, 2005). The spin-off is not only economic; the water sport industry also improves the image of the area. Although the flourishing water sport business is profitable for the municipality it generates costs as well since public facilities need to be expanded or upgraded (interview Eringa, 2005).

Target groups

Since the marina has a lot of facilities and an entertainment program, it is not necessary to leave the marina premises for daily groceries or entertainment. The management team tries to keep berth holders and tourists on the marina premises in order to earn as much money as possible. When children enjoy the facilities in the marina, they do not want to go out for yachting. As a result, the whole family stay in the harbor and spend money in the restaurants, the supermarket and on activities. That is why families are the most important target group.

This marina is like a campsite on the water
(interview De Boer, 2005)

The majority of the berth holders stay non-stop for about two to three weeks in the summer season. They use their yacht like a trailer on a camping ground. Approximately 50 percent of the berth holders are Dutch, the other half come from Germany.



Figure 17:
Atmosphere impression Marina Makkum
(website Marina Makkum, 2005)

Promotion & marketing

Promotion of the marina is done via the website and by means of mouth-to-mouth promotion. Special promotion for the German market happens at the boat show 'Boat Düsseldorf' in Germany. The municipal government gives financial support to the Tourist Information office for promotion of tourism in the region. The Tourist Information office provides specific information about recreational sailing routes. The government has improved the sailing route Bolsward-Harlingen by making bridges higher so that larger ships can sail through without opening the bridge. Additionally, more moorings are being constructed in villages along the route. The aim of this project is to make the region more attractive. In order to monitor and stimulate development of the water sport industry, municipal government officials have meetings with enterprises in the industry on a regular basis (interview Eringa, 2005).

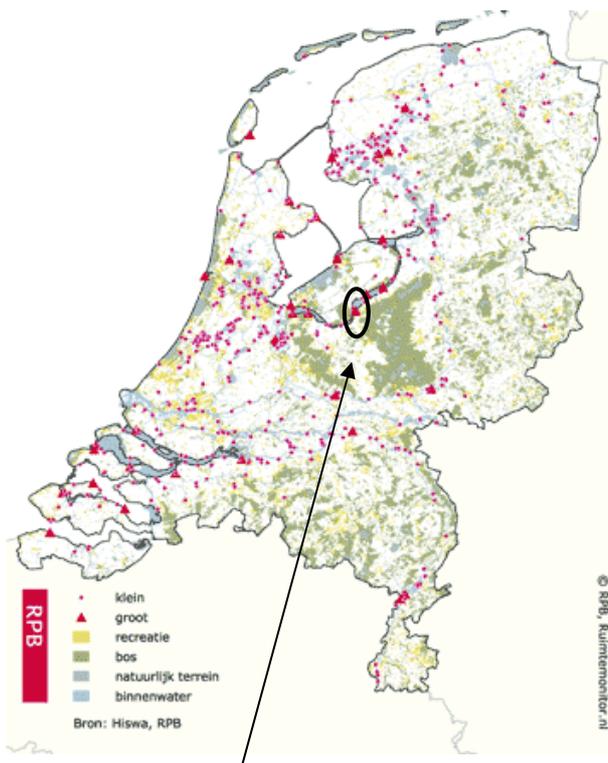


4.2 Marina Wolderwijd

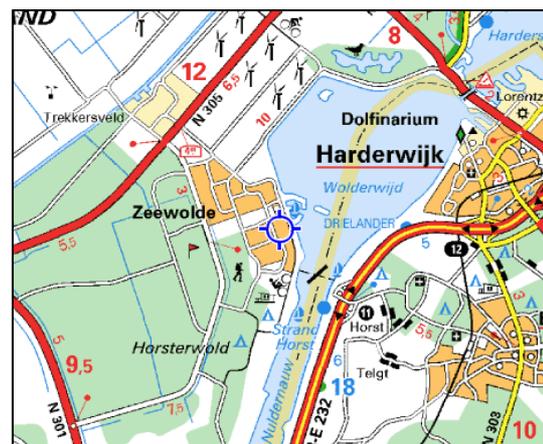
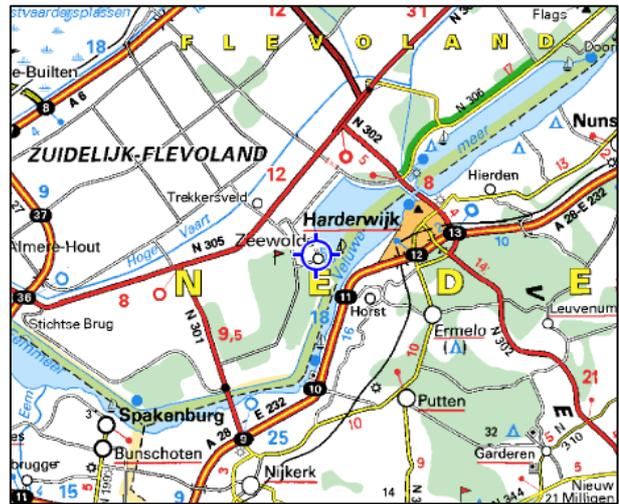
Location

Marina Wolderwijd is situated at Lake Wolderwijd in Zeewolde, one of the few new towns in The Netherlands. Zeewolde belongs to the province of Flevoland that was reclaimed from the sea in the 1960s. Lake Wolderwijd and the 'Randmeren' (discussed in chapter three) were created as a result of the land reclamation project that was finished in 1968 (website Flevoland.to, 2005). Lake Wolderwijd has a surface of 18 square kilometers (website Harderwijk online, 2005). Centrally located in the country, the accessibility by car is good. Traffic jams are very rare in Flevoland. From Amsterdam, marina Wolderwijd can be reached in about 50 minutes over a distance of 60 kilometers (website ANWB, 2005). The operator/owner of the marina says the most important success factor of the marina is its location.

"You can offer the best quality but if the location is not suitable, you will not attract enough people" (interview Verbij, 2005).



Map 5: location of Marina Wolderwijd in The Netherlands. (website RPB, 2004)



Maps 6 and 7: location of Marina Wolderwijd in the province of Flevoland. (website ViaMichelin, 2005)

Spatial planning aspects

The marina was constructed in 1978 (interview Verbij, 2005). This was even before the town of Zeewolde was built. The marina was part of the overall development plan for Zeewolde and its surroundings (website Flevoland.to, 2005). The most popular place to sail to is Lake IJsselmeer, which

is five to six hours away by sailing yacht. Closer to the marina is Lake Wolderwijd and the Randmeren surrounding the province of Flevoland. Sailing in this area is convenient since there is hardly any hindrance by commercial vessels and the sailing routes are sheltered (interview Verbij, 2005).

The marina

The marina was built with 1500 berths. In the 1980s it turned out that the marina had overcapacity: there were no clients for 1500 berths. In 1987 mister Verbij (the current owner) and his business partner bought the marina and filled in one of the docks and build a residential area on that site. On the picture below the filled dock is the one in the front, a little to the left side. Currently, there are 865 berths in this marina. The total number of berths in the municipality is 2000. They are spread over five marinas. Compared with the 20,000 inhabitants living in the administrative area, 2000 berths is a high number. Particularly because the cities nearby, Lelystad and Dronten, also have enough berths available for their own residents.



Figure 18: bird view of marina Wolderwijd (website *Jachthaven Wolderwijd*, 2005)

Marina Wolderwijd is distinctive from other commercial marinas because of the attractive price-quality ratio. Renting a berth for a year in Marina Wolderwijd costs 27 Euros per square meter. While Regatta Center Medemblik has an average price of about 38 Euros per square meter per year and Marina Makkum asks approximately 34 Euros per square meter per year. These three marinas are open year round. In Marina Wolderwijd it is also possible to rent a berth for one season: from the first of April until the first of October. Besides the price, the marina has other interesting aspects: the extraordinary location between old and new land, the sheltered dock and the center of Zeewolde within walking distance. A negative aspect is that the location is not along the main sailing route. Many sailors pass by without noticing the marina.

The marina has a water sport shop, a yacht repair and maintenance service, a hoist, a covered storage, a ramp, a yacht broker, a yacht rental and a playground. The marina has no spin-off in terms of newly settled water sport enterprises as a result of the existence of the marina (interview Verbij, 2005).



Figure 19: Lake Wolderwijd (website Boekhoven, 1998)

Target groups

Marinas close to the densely populated Western part of The Netherlands, for example at Lake IJmeer or Lake Gooimeer are more popular than Marina Wolderwijd. Most of the marinas in Huizen, Naarden and Muiden for example, are fully occupied and have a waiting list of future customers. Many people who cannot rent a berth in this popular region rent a berth in Zeewolde until there is one available elsewhere. Because of the central location in the country, Marina Wolderwijd is a pretty good alternative and there are practically always berths available. In the beginning of the season people try to rent a berth at Lake IJmeer or Lake Gooimeer. In that period the occupancy rate in Marina Wolderwijd is low: 85-86 percent (April 2004). In September the occupancy rate rises because many people choose Marina Wolderwijd when other marinas are fully occupied. In September 2004 the occupancy rate was 99 percent. The majority of the people who rent a berth in Marina Wolderwijd come from the middle and West of the country. Roughly 35 percent come from the administrative region of Zeewolde and 12-14 percent from Germany. The number of Germans is declining. There are several reasons: the German economy goes through hard times, there are new water sport regions in Mecklenburg-Vorpommern (Northeast Germany) and the Dutch lakes in the province of Limburg attract many Germans because they are close to the border (interview Verbij, 2005).

Besides the people that rent a berth for a season, there were 330 short stay visitors in 2004. That is a very low number because the average number of short-stay visitors per year in Dutch marinas is six times the number of berths (WA Yachting Consultants, 1999). For Marina Wolderwijd that would be six times 865, which is 5190. On average, people visit the marina for 1.2 days. Besides sailing, people spend their time walking, cycling and dining. An interesting thing about customers of Marina Wolderwijd is that the great majority is sailor instead of motor boater. 70 Percent of the visitors have a sailing yacht, while the average ratio between sailing yachts and motor yachts in The Netherlands is fifty-fifty (interview Verbij, 2005). Compared with the whole country this percentage is quite high but compared with the Randmeren area it is low. Other marinas in the Randmeren area have 90-95 percent of sailing yachts (WA Yachting Consultants, 1999).

Promotion

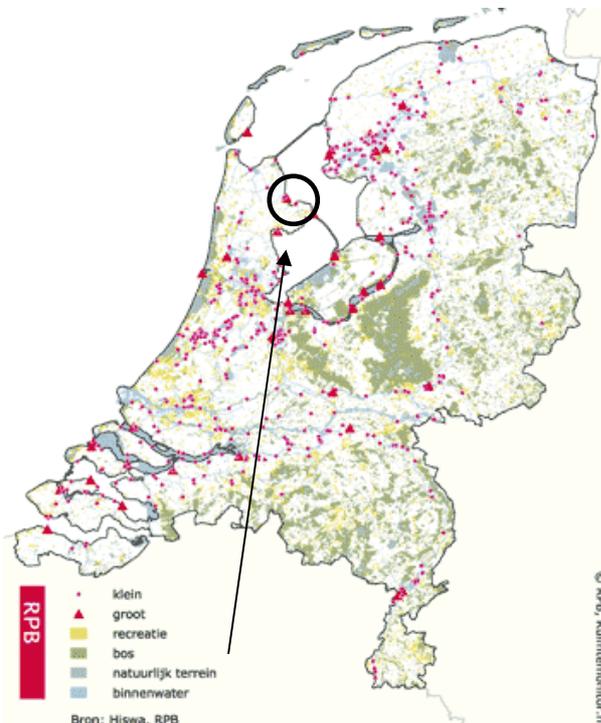
Marina Wolderwijd is promoted by means of mouth-to-mouth promotion and via the network of marina owners. In case a marina is fully occupied, the owner will send people to another marina, for example Marina Wolderwijd.

4.3 Regatta Center Medemblik

Location

Regatta Center Medemblik is situated near the historic town of Medemblik at Lake IJsselmeer. This town belongs to the administrative area of North-Holland. The province of North-Holland can be seen as a peninsula; the land is surrounded by various water systems. The North Sea is situated to the West, Lake IJsselmeer to the East and the shallow Wadden Sea to the North. There is a dense network

of inland waters as well. The negative aspect of this network is the fact that sailing distances between lakes are fairly large (interview Holters, 2005). There are many places to sail to from Medemblik. Besides Lake IJsselmeer and its historic towns people sail to the Wadden Sea, the province of Friesland and the towns, villages and polders of North-Holland (interview Hanenberg, 2005).



Map 8: location of Regatta Center Medemblik in The Netherlands. (website RPB, 2004)



Map 9: location of Regatta Center Medemblik in the province of North Holland. (website ViaMichelin, 2005)

Spatial planning aspects

Several parties were involved in the planning, design and construction of the marina: the Royal Netherlands Yachting Union, the municipality of Medemblik, the provincial government of North-Holland and a construction company. The current site was chosen because of the following reasons in order of importance:

1. The dominant wind direction;
2. Sufficient water depth and absence of sand banks;
3. There are plenty of places to sail to;
4. Good accessibility by car;
5. The historic town nearby;
6. Shops nearby (interview Hanenberg, 2005).

The dominant wind direction and sufficient water depth are very important for regatta sailors. Places to sail to are highly appreciated by recreational boaters. The good accessibility by car is interesting for all target groups. The distance between Amsterdam and Regatta Center Medemblik is a bit more than 60 kilometers and it takes about 40 minutes by car (website ANWB, 2005). The historic town and shops are on five minutes cycling distance. The site was suitable to build a marina because it was not necessary to dredge or to raise the land. And lastly, there are no barriers in terms of locks or bridges nearby (interview Hanenberg, 2005). In order to give the regatta sailors direct access to the open water, the docks are situated right in the unsheltered Lake IJsselmeer. For that reason a big and expensive breakwater is part of the design (interview DHV, 2005a).



The marina

The facility was built in 1998-1999. The expensive regatta facilities could be built in combination with a large marina and with financial support of NOC*NSF, the municipal government of Medemblik, the provincial government of North-Holland, the Royal Netherlands Yachting Union and the Ministry of Health, Welfare and Sport. The two parts of the complex are separated: the regatta center is situated at the North side (closest to the exit) and the berths for recreational sailors are located at the South side of the marina. The basin has two exits; one for the regatta sailors and one for the other yachts. The regatta center is owned by the International Sailing Center Foundation (*Vereniging International Sailing Center*) and operated by Regatta Center Medemblik Ltd. There are 480 berths currently and the occupancy rate is 90 percent. It is possible to buy a berth or rent one for a year. Since most berth holders are active sailors there is usually a place for short-stay visitors who can temporarily take the place of permanent berth holders. The marina is distinctive because of the fact that it is a world-class regatta center. Since the year 2000, the marina hosts a water sport union as well. Members enjoy special prices and they can use a separate covered storage shed. Regatta Center Medemblik Ltd supports the union because it is in the interest of the marina to have an active water sport union (website Regatta Center Medemblik, 2005).

Besides regatta sailors, members from the water sport union and other recreational boaters visit the marina. Because of the different types of visitors the marina has a wide range of facilities. For the regatta sailors there are top-class training facilities, maintenance and repair services, regatta management office and a regatta center. In addition, there is a restaurant, a shop for sailing equipment, a playground for children, bike rental and a covered storage shed (interview Hanenberg, 2005). A new covered storage on land for 100 yachts will be build in the near future. The restaurant and the water sports shop will be enlarged in the near future and more enterprises will open their business at the regatta center (interview Dominicus, 2005). Besides the enterprises at the regatta center, the marina attracted other water sport related businesses to the area such as yacht repair and maintenance, engine repair and maintenance and a shop with water sports equipment. The local supermarket profits from the existence of the marina as well. Thousands of visitors of the marina buy their daily groceries from that shop (interview Dominicus, 2005).

Target groups

In the section before the variety of visitors was discussed. Of course regatta sailors and people who are interested in regattas are important target groups. For most visitors the excellent facilities, races and good location of the marina in the sailing network are the most important reasons for choosing Regatta Center Medemblik. Furthermore, people who are interested in the unique cultural heritage of the province are attracted to the marina. There are many historic towns to visit and the polders are world famous tourist attractions (interview Holters, 2005). Besides the berth holders there were about 4000 short-stay visitors in 2004. This is a very high number compared with the average ratio for Dutch marinas (six times 480 = 2880). Every year at least one big regatta takes place that attracts approximately 1500 people. Additionally, 4 or 5 other events are organized that attract 200-800 visitors each. Lastly there are about fifteen small happenings every year. Totally, the regatta center welcomes about 8000-9000 visitors per year and the frequently visiting berth holders (interview Hanenberg, 2005). Promotion of these events and the marina happens via the website and mouth-to-mouth promotion (interview Dominicus, 2005).



Figure 20: sailors busy at Regatta Center Medemblik



Figure 21: Bird view of Regatta Center Medemblik



4.4 Conclusion

The third sub question mentioned in chapter one was:

What are the specific spatial planning characteristics of the marinas in the Dutch case studies?

The location of the three marinas discussed in this chapter is of great importance. In every case, this is for another reason. In the case of Marina Makkum the location is valued highly because it is a central position in the waterway network. From Marina Makkum, many different water systems can be reached in one day. Additionally, the marina is the closest to the locks leading towards the Wadden Sea. The second case, Marina Wolderwijd, has a good location because it is well accessible by car. Thanks to the central location in the country, many Dutchman can reach the marina within two hours. Lastly, Regatta Center Medemblik has a good location because of the physical conditions: strong winds and sufficient water depth. It depends on the target group and the business philosophy how a location is valued.

Besides the location, site selection and the spatial planning process were discussed in this chapter. In all of the three cases, the government did or cooperated during site selection and the planning process. Therefore, there were no significant conflicts with plans and legislation. When the government is stakeholder, it is likely to have a smooth planning process.

Chapter 5:

Criteria for spatial planning of water sport facilities in The Netherlands

Criteria for spatial planning of water sport facilities in The Netherlands are developed in this chapter. Before listing the criteria, general aspects about criteria and about valuation of an area or site are discussed. The starting point is the fact that every site, area or design has positive and negative features (push and pull factors) that can be valued by means of the criteria.

5.1 Push and pull factors

When a new marina is being build and a site needs to be selected, various alternative locations are studied. An analysis of various sites is also important when a facility moves to another place or in case a facility wants to expand business. When it comes to a valuation of a site, push and pull factors are weighed. Push factors are aspects that make a place unattractive or not suitable for the project. Those places 'push' certain people and activities to other places. In this research it could for example be the fact that an area has very limited water depth. This is not convenient for yachting so recreational boaters will be 'pushed' to other areas. Pull factors, on the other hand, are positive features that attract activities, people or enterprises. A pull factor can be a great variety in water systems. Pre-conditions and criteria for spatial planning are always pull factors or can be translated into pull-factors. In case an area does not match the pre-conditions, it can be excluded from the site-selection process. Another possibility is to determine how much money or effort is needed to change the situation in order to meet the pre-conditions, for example, an improvement of the water quality, dredging waters, building a new road, etc (interview Ter Steege, 2005).

5.2 Criteria

Criteria can be subdivided in hard and soft criteria. Hard criteria are valued by measurable standards such as currency, size, time, distance, etc. For spatial planning of water sport facilities hard criteria could be: distance from a city to a marina or the marina density in a specific area. Soft criteria cannot be expressed in measurable values. 'Attractiveness of a site' for example, can be valued on a scale from 'very attractive', to 'moderately attractive' to 'unattractive' (interview Ter Steege, 2005).

There are three main categories of criteria for spatial planning: economic, environmental and social (interview Ashworth, 2005). For The Netherlands environmental criteria mainly have the greatest impact on the decision making process. This is because The Netherlands have a very advanced and extensive set of regulation for spatial planning. In particular the environmental legislation is restrictive to development of the water sport industry. For China, economic and social criteria play a dominant role. The standard of living is lower than in The Netherlands, for that reason less people can participate in water sports. Social criteria are important since water sport is new to the Chinese society and because the Chinese have a different culture with different preferences and values than Dutch recreational boaters.

The criteria for spatial planning of water sport facilities in China that are described below are based on academic concepts and approaches, interviews with key-persons, a questionnaire among Chinese people and Dutch and Chinese case studies. In case these criteria are used in other research they can be weighed. In different projects a different value will be attached to the criteria. Essential criteria get a high weight and less important criteria a lower weight. The importance of each criterion



depends on the aim and context of the project. These criteria might not reflect all issues of the spatial planning process. In order to keep the set of criteria easy to handle, the seven most important criteria are described.

a) Location in the regional economy

In case marinas are situated too close to each other, there will be too strong competition. As a result both marinas will see lower profits. On the other hand it is interesting to have several marinas in one water sport region. Sailors can make trips from marina to marina. Depending on the market, there is a variety in the amount and density of marinas that can be planned in a water sport area. The second aspect of this criterion is the maximum accepted travel time of the target group. This is the time customers need to travel from their home to the water sport facility. According to Tobiasson and Kollmeyer (1991) marinas should be planned within 80 kilometers from a metropolitan area or other market.

b) Regional economy structure

Before entering the market the following question should be answered: Is the market saturated or growing? In case of a saturated market it is probably not profitable to start a new marina. In case of a growing market there are chances for development. However, the different segments of the market should be researched. When one segment of the market (for example: full-service commercial marinas) is saturated, another segment (non-profit marinas with basic facilities) can be growing at the same time. After the decision has been made to enter the market, the question rises whether a water sport facility or water sport company fits in the regional economy. The company or facility has to settle down and find the right place in the regional economic structure. In order to say something about the contribution of the enterprise to the regional economy its product is compared with the regional products. If it is clear what the position of the company in the regional production structure is, it is possible to say something about the contribution to the regional economy. In case a marina can generate positive spin-off for the water sport industry, the tourism industry, or the regional economy in general it has a positive impact on the economy (interview DHV, 2005b). Positive spin-off can consist of attraction of related enterprises or customers that do not only consume water sport products or facilities but other products as well.

To start a marina, an investor, operator and customers should be present. In case these parties are not in the region, they need to be attracted. This takes much effort so the region should have enough qualities to attract investors, operators and customers. If not, it seems to be better to choose another region for water sport development.

c) Conflicts with legislation, plans or current functions

This criterion is often used in spatial planning projects (interview DHV, 2005c). It is important because it is always applicable. Every site has a relationship with surrounding functions. A few examples: it can be dangerous to have a marina adjacent to a public beach. A marina close to an industrial port can cause traffic problems and hindrance when commercial vessels and pleasure crafts use the same routes. Even when it seems there are no functions around there can be a natural area that should not be disturbed by noise pollution or newly built structures (Tobiasson and Kollmeyer, 1991). The marina and all tourists visiting the site should not exceed the carrying capacity of the area. Furthermore the project should not conflict with legislation, zoning plans and pre-conditions for development (chapter 2.3). A site or region can be valued for this criterion after doing research on:

1. Rules and legislation;
2. Government plans;
3. Current functions and carrying capacity.

In case there are no conflicts, the site is very interesting (+++). In case there are one or more conflicts, the site is less interesting (for example: one conflict = 0) or the site is very negatively valued (for example: three conflicts = ---). In the last case it is better to find another site.

d) Accessibility over land

This criterion only regards accessibility over land because accessibility via water is included in criterion f): *'geographic position in the waterway network'*. Accessibility over land is measured in kilometres and travel time. For each project it should be determined whether it is more important to use travel time or travel distance. According to WA Yachting Consultants, Dutch people accept a maximum travel time of two hours to travel from home to the water sport facility. Alternative locations for marina development can easily be compared by means of travel time and/or distance when it is clear where the target groups come from.

Gunn (2002) focuses on the fact that in the first place visitors need to be attracted to the area. In order to achieve that the area must be easily accessible and the way to the area should not be unattractive, otherwise people might change their plans before they reach the site (Gunn, 2002). Tobiasson and Kollmeyer (1991) listed thirteen basic characteristics that a potential site for a marina should have. Among them are 'adequate transportation infrastructure' and 'access to utilities'.

For Marina Makkum, accessibility is not very important. People choose the marina because of the location in the waterway network or because of the facilities at the marina. For Marina Wolderwijd, on the other hand, accessibility is the most important feature of the marina. That is because it is an overspill marina. Lastly, Regatta Center Medemblik has a unique position because it is one of the few regatta centers with such a high facility level in The Netherlands. For that reason people are willing to travel further (or longer) to this marina than to places with less specialized regatta facilities or lower quality services.

e) Location in the waterway network

The quality of the geographic position in the waterway network can be measured based on the average sailing distance to various water systems (sea, lakes, canals, etc.). The number of water systems that can be reached in half a day, one day or two days, determine the variation of the waterway network and the possible sailing routes. The average cruising speed for sailing yachts and motor yachts is ten kilometers per hour. If people go yachting for half a day (3 hours) they can sail a route of about 30 kilometers. During a full day, 6 hours, sailors can make a route of about 60 kilometers. These figures are average distances (interview WA Yachting Consultants, 2005).

Marina Makkum for example, has a very good location in the waterway network because within half a day four different water systems can be reached: the Wadden Sea, the large Lake IJsselmeer, small lakes and canals. The geographic position in the waterway network is the most important feature mentioned by Marina Makkum, the municipality of Wûnseradiel and the province of North-Holland. From Marina Wolderwijd only two water systems (small lakes and canals) can be reached in half a day. For Marina Wolderwijd this criterion is of less importance. This is not surprisingly because Marina Wolderwijd is an 'overspill marina' and in that case accessibility by car is the most important criterion. The most important aspect Regatta Center Medemblik mentions is the location regarding the dominant wind direction and sufficient water depth. Regatta Center Medemblik values this aspect as most important. That means the geographic position is very important but in the case of this marina wind direction and water depth are more important than sailing routes and various water systems.

According to the Royal Netherlands Yachting Union the most important characteristic of the Dutch water sport industry is the interesting and diverse waterway network with plenty of places to sail to (interview KNWV, 2005). Also 'Stichting Recreatie' (Leisure Foundation) mentions that variety in the waters is important to the water sport area (2002). And lastly WA Yachting Consultants (2003) found that recreational boaters in the Lake IJsselmeer area and at the Wadden Sea appreciate sailing



routes and open space at the water most. Besides the fact that it is interesting for recreational boaters to be able to sail to many different waters, it is also important to be able to reach other marinas in case people make a multiple-day trip. DHV (2004) suggests planning several marinas in a water sport region that can be reached within one day.

f) Attractiveness of the landscape at the site or in the region

The criterion 'attractiveness of the landscape' can be used for a marina or for a water sport region. In case the site of a marina is valued, the attractiveness of the location and its direct surroundings are topic of discussion. In case a whole region is valued based on this criterion, the natural, historical and cultural landscape within the region is topic of research. The ultimate goal is to attract visitors to the water sport area and make them stay as long as possible and stimulate consuming. In order to reach this goal the area must be attractive (Gunn, 2002). The presence of nature, beautiful landscapes, villages and towns plays an important role in the choice of a sailing area (Stichting Recreatie, 2002). WA Yachting Consultants found that Dutch yachtsmen enjoy quietness, freedom and nature most in a water sport area. However, unattractiveness of a marina and its surroundings does not have to be problematic: in some cases the purpose of the marina is to park the car and leave the area by yacht. This is something that happens in 'Flevo Marina' in Lelystad, The Netherlands.

In Sommer's opinion attractiveness of the site is a less important criterion because it could be upgraded artificially. However, upgrading cost money and effort and it should only be done if it is worth the investment (interview DHV, 2005b).

g) Ratio between price and quality & services

It is important to offer a set of facilities that matches with the preferences and ambition of the target group (interview DHV, 2005b). People that visit a yacht club for business for example, appreciate representative facilities that can serve large groups of people. Yachtsmen that want to improve their sailing skills search for a marina with a sailing school. The better the match of the customer's expectation with the offered facilities, the higher the satisfaction. Satisfaction is important to achieve a growing flow of visitors (Gunn, 2002). The kind of facilities and services as well as the quality and price should fit to the target group. Some marinas have luxury facilities for the high class and budget facilities for the middle class. This is not accepted in every culture. During the design of the marina it is good to discuss cultural issues. Particularly in segmented countries it is important to consider that (interview DHV, 2005b).

The existence of non-profit marinas with reasonable prices for their basic facilities is the second most important aspect of the Dutch water sport industry mentioned by the Royal Netherlands Yachting Union. They offer water sport facilities that people of different social classes can enjoy (interview KNWV, 2005).

**Criteria for spatial planning of water sport facilities in The Netherlands
valued by various respondents (continued on next page)**

<i>Criteria →</i>	<i>Location in regional economy</i>	<i>Regional economy structure</i>	<i>Conflicts with legislation, plans, current functions</i>	<i>Accessibility by car</i>	<i>Location in waterway network</i>	<i>Attractiveness landscape at the site/in the region</i>	<i>Ratio between price and quality & services</i>
<i>Marina Makkum</i>	Well developed water sport industry	Significant spin-off in tourism and water sport industry	No conflicts, positive value.	Of less importance : low weight	Most important issue: strong weight	Site is of less importance	2nd most import issue
<i>Municipality of Wûnseradiel</i>	Well developed water sport industry	Significant spin-off. Revenue government	No conflicts, positive value.	Less importance : low weight	Most important: strong weight	Region is 2nd most important	If negative: people go to other area
<i>Marina Wolderwijd</i>	Overcapacity: great importance	Over capacity marinas	No conflicts, positive value.	Most important: strong weight	Of less importance: low weight	Less importance : low weight	Less importance : low weight
<i>Regatta Center Medemblik</i>	Unique position because Regatta Center	Significant spin-off	No conflicts, positive value.	Of less importance : unique facility	2nd most important (regatta sailors and recreational sailors)	3rd most important (for recreational sailors)	Most important : strong weight
<i>Province of North-Holland</i>	n.a.	Significant spin-off in tourism and water sport industry	No conflicts. Water sport integrated in plans	3rd most important	Most important: strong weight	Good: 2nd most important	If negative: people go to other area
<i>WA Yachting Consultants</i>	Maximum sailing distance from marina to interesting town 3 hours	Can generate significant economic spin-off, important for local government	Very important because environmental legislation is restrictive	Maximum travel distance between home and marina: 2 hours	2nd most important	Most important: strong weight	3rd most important
<i>Royal Netherlands Yachting Union</i>	Important, but lower weight	Important to generate spin-off	n.a.	2nd most important	Most important: strong weight. To get access to various water systems	Variety in water sport areas is success factor water sport industry	3rd most important: success of water sport unions

Figure 22: Criteria for spatial planning of water sport facilities in The Netherlands valued by various respondents (own source). Continued on the next page.



**Criteria for spatial planning of water sport facilities in The Netherlands
valued by various respondents (continued)**

Criteria →	Location in regional economy	Regional economy structure	Conflicts with legislation, plans, current functions	Accessibility by car	Location in waterway network	Attractiveness landscape at the site/in the region	Facilities and target groups match
<i>DHV Marinas & Waterfronts (engineers)</i>	Distance between marinas: max. one day sailing	Can generate significant spin-off in tourism and water sport industry	Specific legislation for water sports		Most important: strong weight?	3 rd most important	2 nd most important??
<i>Sommer DHV (process management)</i>	2 nd most important: competition	Most important to generate spin-off	Pre-conditions for spatial planning	Less important: low weight	Less important: low weight	The site can be upgraded artificially	Important when planning for different culture
<i>Adie (development & design)</i>		Revenue government	Most important: strong weight			2 nd most important. Harm site as less as possible	
<i>Ashworth (tourism planning, marketing & promotion)</i>	Know the competing alternatives	Important to generate spin-off	Important, often pre-condition??		Important: not possible to change artificially	Important in promotion and marketing	Segmentation of the market
<i>Gunn (tourism planning)</i>	Clustering of activities is efficient and convenient for user	Stimulate local economy instead of foreign parties	Integrated planning on regional/local scale	2 nd most important (improves visitors attraction + satisfaction)		Most important: strong weight. Improves visitors satisfaction	3 rd most important. Improves visitor satisfaction. Segmentation
<i>Tobiasson & Kollmeyer (engineers)</i>	2 nd most important	Not discussed	Most important: strong weight	3 rd most important	Not discussed: not important?	Not discussed: not important?	Facilities generating most return are most interesting
<i>Youell (tourism)</i>	Avoid overcrowding to safeguard carrying capacity	Most important: strong weight		n.a.	n.a.	2 nd most important Good planning to avoid harmful impacts	
<i>WTO (tourism)</i>	Interrelate all tourist attractions. Avoid overcrowding	Economic benefits should be balanced, optimised and distributed equally	Specific legislation for water sports			Good planning to avoid harmful impacts	Important. Every target group different marketing strategy

5.3 Conclusion

The fourth sub question mentioned in chapter one was:

What are the criteria for spatial planning of water sport facilities in The Netherlands and are they applicable in China?

After this chapter the following criteria can be listed:

a) Location in the regional economy

Planners should find the most suitable location within the network of water sport facilities. That will be a location that is not too close to another water sport facility because of competition. Another condition is that the target group can reach the location within a two-hour car drive and within one day sailing from another marina. For regatta centers the travel time can be longer since these facilities are scarcer.

b) Regional economy structure

During the selection of a region and site for a water sport facility, planners should consider in what way and to what extent the facility can contribute to the regional economy. Positive impacts on the regional economy can convince the government to support the project.

c) Conflict with legislation, plans or current functions

Planners should choose a location without conflicts, or with fewer conflicts with legislation, plans or other functions in the vicinity.

d) Accessibility over land

Planners should find the most suitable location in terms of accessibility by car.

e) Location in the waterway network

The greater the variety of the waterway network (several water systems that can be reached from the marina), the more interesting is the sailing area.

f) Attractiveness of the landscape at the site or in the region

The more attractive an area, the more appealing it is to (potential) visitors.

g) Ratio between price and quality & services

The price, services and quality of the facility and services should match with the preferences and ambitions of the target group.

These criteria are compared with the Chinese situation in chapter nine and in chapter ten is explained how planners should use the criteria in China.



Chapter 6:

Spatial planning and legislation in China

6.1 Land use planning system

In China there is no comprehensive spatial planning carried out by a 'Planning Department' as is the case in The Netherlands and Germany. This means there is not one department that manages all planning aspects such as transportation planning, tourism planning, environmental planning, urban planning, etc. There are different departments dealing with planning matters. These different departments have to negotiate with each other to make comprehensive plans. Figure 24 on page 70 shows the organization of spatial planning in China. In every province land use planning is similarly organized, except for Beijing, Shanghai, Chongqing and Tianjin. In these four 'city-provinces' provincial and city level are integrated (interview Pu, 2005).

Every three years the provincial government of Jiangsu province makes a master plan for the spatial planning development. Once in three years an evaluation takes place about the spatial planning policy of the government in relation with the actual developments that took place. During the latest evaluation of the spatial planning policy it became clear that the spatial planning did not catch up with the ongoing developments. According to Professor Pu the Yangtze River Delta Region, where Jiangsu is part of, has the fastest developing economy in China. Due to the fast economic development land use has changed dramatically in that region. Much of the arable land has been changed into 'construction land'. Economic development and protection of landscape and agriculture should be better balanced.

Every province has to secure a certain amount of land for agriculture and nature. The provincial government distributes the total amount of development area among the cities within the province. Every city selects its own urban development areas and asks for permission at the provincial government (interview Pu, 2005). The Chinese government owns all land and waters. In some cases enterprises have the opportunity to buy a piece of water surface (or lease it for some years) to develop water sport activities.

6.2 Site selection for marinas

The preceding section was about the fact that the government owns all land and water and has master plans for long-term development. For this reasons the government is in most cases the one who chooses a site to develop. Thereafter they start searching for developers. When a developer offers a plan the government decides whether the plan fits the site selected by the government. Sometimes the developer is the one who chooses a site and asks for permission at the Land Use Commission on city level (see figure 24). The Land Use Commission will discuss this matter with the Transportation Commission, the Construction Commission and the Tourism Commission. All of the four commissions should approve the plan.

6.3 Legislation regarding traffic on waterways

Many coastal regions have a Maritime Safety Administration (MSA). This administrative body falls directly under the central Maritime Safety Administration and the Ministry of Communications (website Royal Netherlands Consulate-General, 2005). Figure 23 on the next page, shows the organization of the MSA including some regional MSA's for example.

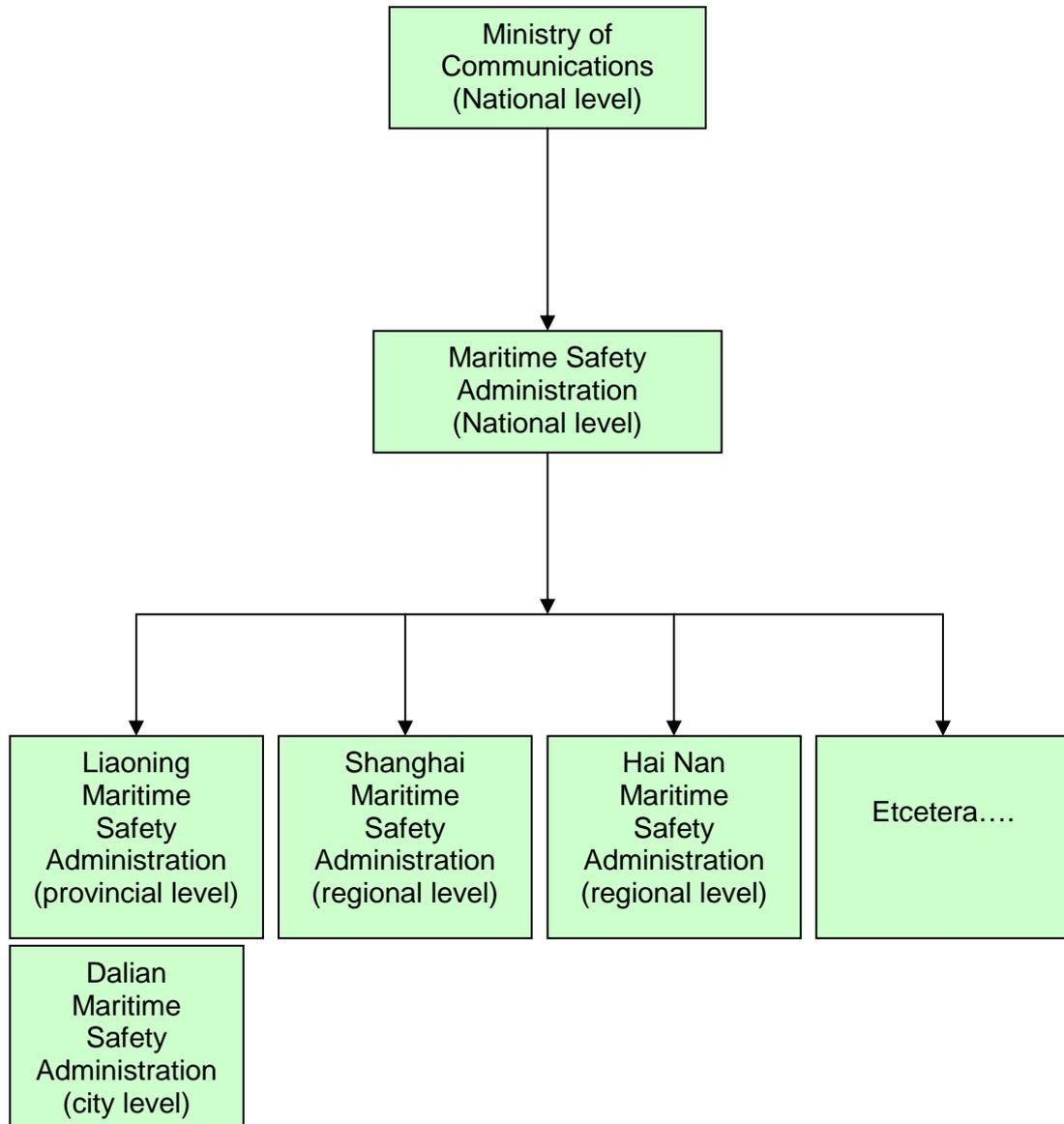


Figure 23: Organization of the Maritime Safety Administration (inspired by: DHV et al, 2003)

The MSA on the national level enforces regulations concerning the traffic safety on inland and coastal waters. In this set of rules 'inland navigable waters' are defined as: *waters in rivers, lakes, reservoirs and canals as well as harbors recognized by the competent authorities*. 'Vessels' are defined as: *all types of displacement or non-displacement ships, boats, rafts, surface aircrafts, submarines and mobile platforms*. This means that water sports on inland waters like: motor boating, sailing, windsurfing, canoeing etc. are all activities that need to meet the requirements mentioned below (Holland Yachting & Marina Development Group, 2004).

- Vessels should be technically certified by the Shipping Inspection;
- Vessels should be registered;
- Vessels should be manned with licensed crew;
- Vessels should be properly insured and insurance papers should be kept on board.
- The traffic safety control of the waters at urban scenic spots and gardens shall be prescribed by the people's government of the provinces, autonomous regions and municipalities under the Central Government.



Regulation on regional level differs from place to place. On some waters in China navigation of pleasure crafts is prohibited because of hindrance of commercial traffic. In other cases yachts are banned for no apparent reason. In most places there is no regulation at all. For Shanghai there are two administrative bodies: first, Shanghai Maritime Safety Administration that is in charge of the coastline, Eastern parts of the Yellow Sea, parts of the East China Sea, the Yangtze River, Huangpu River and the port of Shanghai. The MSA for the Shanghai region has the following tasks (Holland Yachting & Marina Development Group, 2004):

- Vessel traffic management and law enforcement
- Maritime search and rescue
- Shipping inspection and ship survey
- Issuing of certificates to seafarers (licenses)
- Dangerous goods control and prevention of pollution from ships
- Hydrographic survey and aids to navigation.

Second, the Shanghai Municipal Navigation Administration (SMNA) belongs to the Shanghai Municipal Communications Office. The SMNA carries out and controls rules for navigation on inland waters such as Dianshan Lake where the Shanghai Boat & Yacht Club is located. As an example relevant regulation of the Shanghai municipality for yachting is indicated as follows: 'Owners of vessels and rafts shall pay a channel-maintenance fee to the Shanghai Municipal Navigation Administration. The SMNA shall use the fees for channel-maintenance only. The responsibilities of the SMNA are largely comparable with those of the Shanghai MSA. The difference is that both organizations deal with different waters. The Shanghai municipality designed regulations to protect the upper Huangpu River. The following parts are considered relevant for yachting (Holland Yachting & Marina Development Group, 2004):

- 'Dianshan Lake is the main water reservoir in the protection zone of water sources. Protection of the water source is a precondition for (construction) activities along Dianshan Lake. Construction and tourism projects have to be strictly controlled, and corresponding pollution treatment facilities shall be installed'. (Chapter eight goes further into details about Dianshan Lake)
- 'It is forbidden to discharge residual oil, waste oil, oily admixtures, cargoes residues, and harmful pollutants, such as garbage and sewage from ships. The discharge of oily wastewater or domestic sewage from ships shall comply with the standards for the discharge of pollutants by ships'.
- 'All mechanically propelled ships must be installed with waste oil storage equipment. Residual oil or waste oil of ships must be recovered. Mechanically propelled ships with a carrying capacity > 15 tons and not-mechanically propelled ships with a carrying capacity > 40 tons shall be installed with containers for storage of garbage and sewage water'.

The Chinese government uses a complete set of regulations regarding navigation and safety of vessels in general. There is no specific legislation for yachting carried out by the central government. For pleasure crafts the same rules are valid as for commercial ships or other ships (Holland Yachting & Marina Development Group, 2004). People who own a yacht often don't know where it is allowed to navigate. Compared with the Dutch system legislation in China is not very clear and consistent. If a water area is privately owned or leased from the government, the owner of the water area can allow yachts. There are just a few places around the existing marinas where navigation with pleasure crafts is allowed. Therefore the sailing area is quite limited.

6.4 Legislation and control in the future

The Shanghai MSA and Dalian MSA are currently working on specific yachting regulations (DHV, 2005) Consistent legislation and control should be widely developed in the near future. Local and regional

administration levels should write integral legislation in case they are in charge of the same water surface or the same waterway network. It is often inconvenient for ships to mark administrative borders on water. Therefore it is in many places unclear in which area a ship is located and what rules are in force. In general legislation brings about two advantages: firstly, legislation can be used to stimulate the positive impacts of the water sport industry. Secondly, legislation and control has an important role in fighting the negative impacts of water tourism. Legislation for water sport should not only affect pleasure crafts and their crew. If an area is environmentally sensitive, there should also be regulation to protect the environment. For example, limited visitors numbers or restricted opening hours can safeguard an area from pollution and disturbance.

6.5 Conclusion

The fifth sub question mentioned in chapter one was:

How is spatial planning of water sport facilities organized in China?

In China, there is no comprehensive spatial planning. Many governmental bodies deal with spatial planning issues. The government owns practically all land, has great impact on site selection for new water sport facilities.

Legislation for commercial vessels is also valid for recreational boating. There is no specific legislation for yachts and sailors.

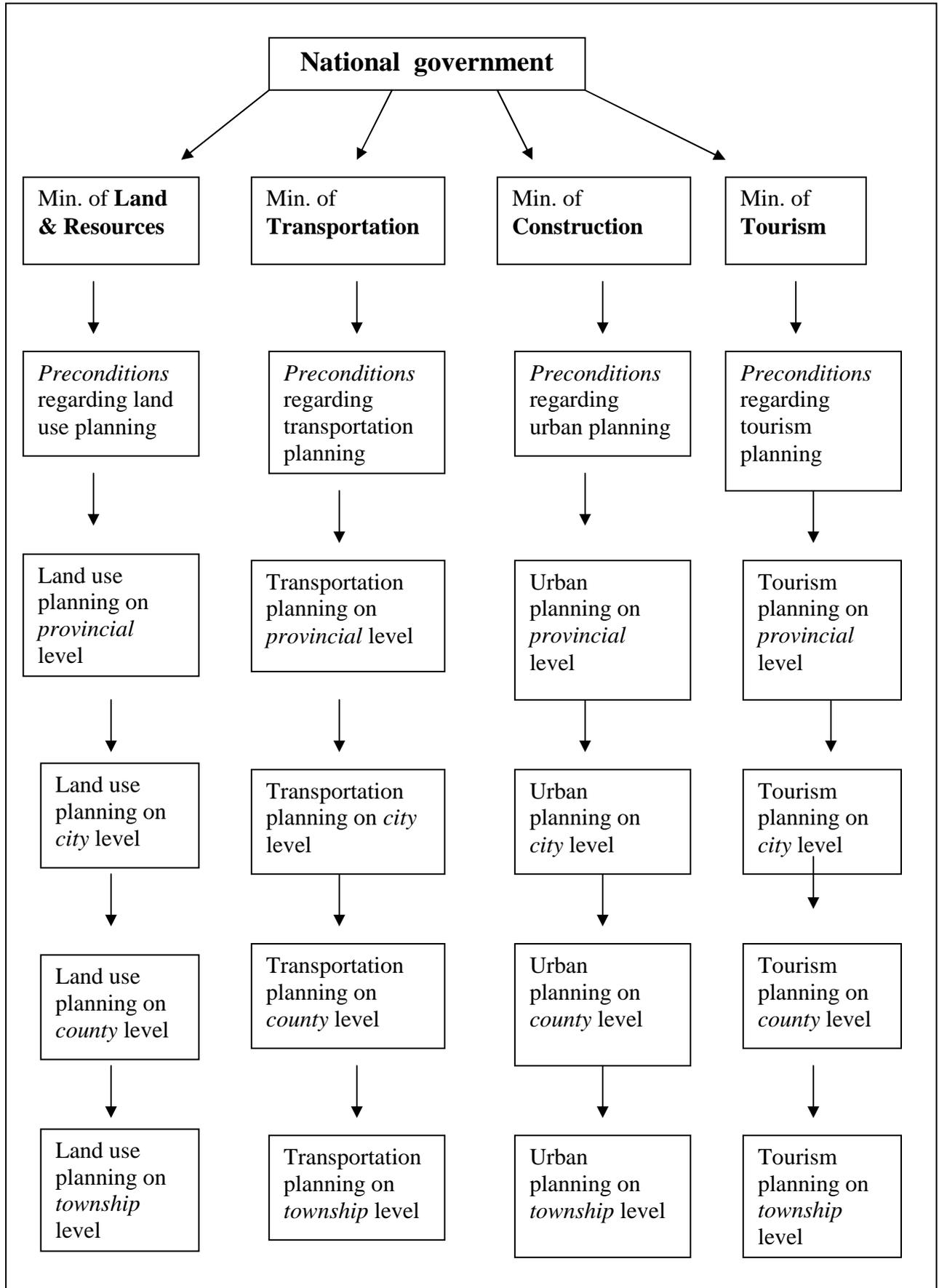


Figure 24: Organization of authorities dealing with spatial planning in China (interview Pu, 2005).

Chapter 7:

Chinese and their leisure time

In the preceding chapter about spatial planning of water sport facilities in The Netherlands it became clear that it is important to know what the different target groups ask for in order to design a successful marina. That is why it is necessary to know how much free time the potential customers have, how much time they spend on leisure activities, how far they are willing to travel and what facilities, types of water sport and sailing areas they are interested in. Planners, developers and designers must keep a close eye on changes in the society because those changes may affect the preferences of the target group and with that need for different facilities. Before criteria for planning water sport facilities in China can be described, more information is needed about the way Chinese spend their leisure time. One of the sources of information was a questionnaire held at the Shanghai International Boat Show. The group of respondents consists of Chinese visitors of this exhibition who are at least a bit familiar with yachting. The questionnaire was held to collect information about how much Chinese are willing to spend on yachting, what they appreciate or dislike about yachting and how far they are willing to travel to water sport facilities.

7.1 Amount of leisure time

According to official legislation, people who are employed by the government (education, hospital, government institutes, state owned enterprises, etc.) have 113 vacation days per year. This number includes Saturdays and Sundays, one week off during the first week of May, one week holiday in October and one week during Chinese New Year in January or February. Students and people who work in education institutes have two months summer holiday (interview Pu and Wu, 2005). In addition, to this number Mister Xu, expert in tourism and real estate, mentions another kind of vacation: holidays paid by the employee. In most enterprises it is allowed to take between 7 and 21 days per year. A small percentage, 10-20% of the white-collar workers enjoys paid holidays. Xu expects this percentage to grow in the near future since people start to consider leisure time as a right, as something valuable (interview Xu, 2005).

Many people spend just a small amount of their free time on recreation say professors Sun and Yu from Fudan University in Shanghai. The education system has strong influence on this. Because of its competitiveness children are very busy with studying. They do not have time to go out with their family during the weekend and that is why parents stay at home as well. Young parents spend much of their free time supervising their children doing homework. When the children start their studies in university, both children and parents have more time to spend on recreation activities (Sun and Yu, 2005).

In general, expatriates enjoy less free time than their colleagues in The Netherlands. Many of them work on Saturday morning while Dutch offices are closed at that time. Dutch expatriates in China have their day off on Sunday (interview Van der Laarse, 2005).

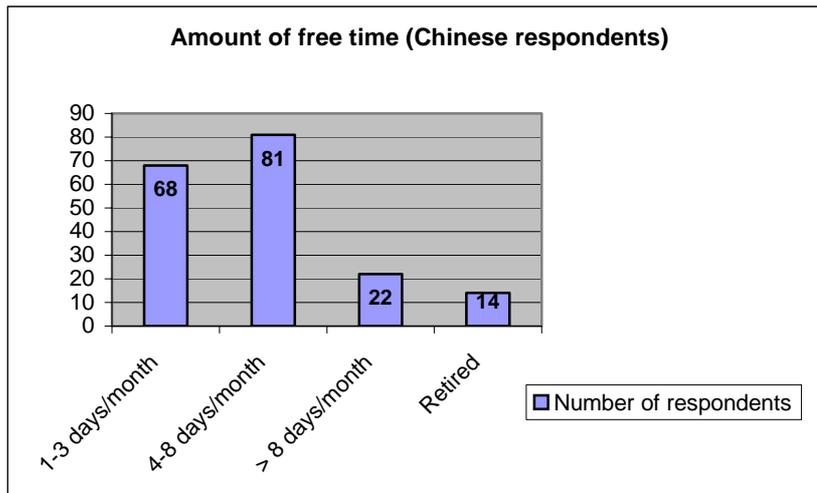


Figure 25: Amount of free time of Chinese respondents.
Total number of respondents: 175 (own source)

7.2 Leisure activities

Popular and less popular activities

Experts from different backgrounds mostly agreed with each other about popular leisure activities. Professors in Sociology, a professor in Tourism as well as an expert in Tourism and Real Estate shared the same opinion: enjoying natural scenery is most popular among urban people. People from the countryside prefer sightseeing in urban areas. It can be said that outdoor activities are more popular among Chinese than activities such as visiting a theater, cinema or a museum. People pay much attention to keeping the body healthy and that is why sports and exercises are popular. Furthermore, people appreciate variation in their recreation pattern. Second most popular are cultural activities such as sightseeing and visiting theatre, museum or concert. Least popular are 'relaxation' and 'sport' (Sun & Yu, 2005 and Wu, 2005 and Xu, 2005). It is noticeable that Chinese search for activities that they cannot do at home. Not many people go out to relax; they can do that in their living room.

Of course the before mentioned range of popular and less popular activities is not the same for every social group. Families with young children for example value museum visits higher than the majority of the Chinese population. That is explained by the fact that it is a way to educate children. Sport activities are not very popular among the mass public. However, young people, foreigners and a certain group of rich Chinese like that kind of recreation (Sun and Yu, 2005).

When people from the middle class go on a holiday for several days, they prefer a program with variation. One thing that cannot be missed is dining. As professor Yu said: "Dining is very important at any time, at any place". (Sun and Yu, 2005).

Water-based activities

Chinese people, especially at the East Coast, have always had a close relation with water. For a long time in history water was necessary to survive. There were many fishing villages and water towns with a network of canals. In The Netherlands many people think that a lot of Chinese cannot swim and that they might regard water as dangerous. Actually many Chinese can swim and it is very popular even in places with polluted water. Also among tour groups it is popular to visit the lakeside, coast or rivers and canals (Sun and Yu, 2005).

Although there has been a culture of water towns in the past, Mister Xu supposes this does not make the current generation more interested in water sports. It has been too long ago in history. The fact that there has not been a culture of water *sport* in China so far has greater impact on the current development of water-based tourism (interview Xu, 2005).

Some people think that Chinese do not participate in water sport because they do not want to get sun burnt or because they cannot swim. According to Mister Xu the before mentioned issues are no problem for the Chinese. The most important thing that keeps people from boating is the poor water quality. Visitors at the Shanghai Boat Show were asked to indicate negative aspects of yachting. Only 32 people out of 196 respondents said there is nothing negative about yachting (see the figure below). 100 Visitors said that the high cost is the worst aspect.

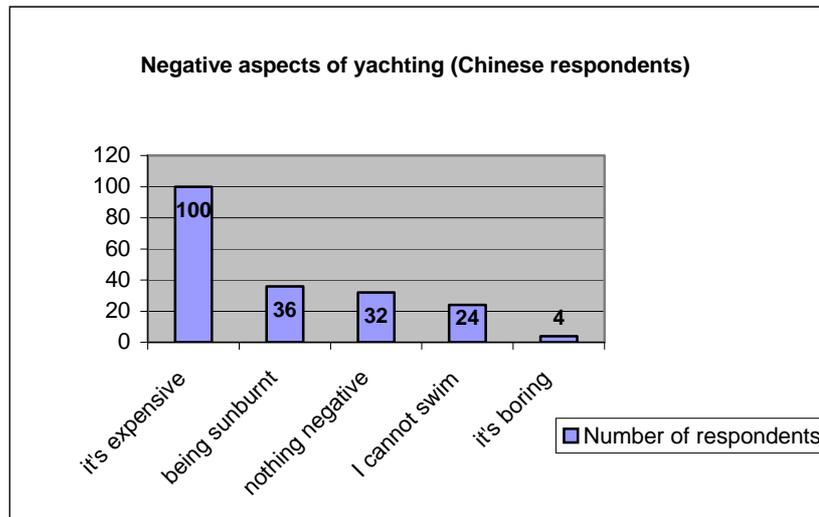


Figure 26: Negative aspects of yachting. Total number of respondents: 196 (own source)

Outdoor recreation

The board of the Shanghai Boat and Yacht Club observed that many Chinese are not strongly interested in sailing. In case that they joined or contacted the club it turned out that their motivation was based on their interest in outdoor activities. This objective is often stronger than their affection for sailing or motor boating (interview Van der Laarse, 2005).

Professors Pu and Wu from the department of Geography, Nanjing University, think there is a lack of outdoor-recreation possibilities in the provinces of Shanghai and Jiangsu. From the inner cities it takes a long time to reach an area with natural scenery in the countryside (interview Wu, 2005). Professors in Sociology from Fudan University are convinced there is a shortage of outdoor recreation. But people are used to that, they say. If the Chinese have never been to greener cities with a variety of outdoor recreation possibilities, they will not miss it in their own living environment. When they visit the United States for example they will compare that situation to their own living environment and conclude that there is definitely a lack of outdoor recreation at home. One of the few large green areas in Shanghai is a forest park to the North East of the city. Every weekend the park is fully occupied by people who search for green space and fresh air (Sun and Yu, 2005).

Development of more water sport facilities helps to decrease the lack of outdoor recreation possibilities. Different kinds of marinas should serve different target groups. For instance: a public marina with small boats to serve the middle class and a luxury yacht club with membership can satisfy the needs of the upper class.

7.3 Interests related to facilities

Many marinas offer facilities such as a restaurant, bar, supermarket, boat shop or repair service. These services can derive important revenue for the marina. See for example the Dutch case study 'Marina Makkum' in chapter 4.1. In order to make the marina as attractive as possible the facilities must match with the interest of the target group. That is why it is important to know what activities



and services the customers appreciate. In the Netherlands there are marinas with an extensive entertainment program for children as well as adults. Some visitors enjoy those activities a lot, maybe even more than sailing. Others who prefer to be independent search for a peaceful and quiet environment and may dislike such programs. Marinas specialized in technical services such as boat repair, maintenance, rigging shop, etc can be a paradise for dedicated regatta sailors. Families may regard such a place as boring because there is nothing to do in the evening. Companies visiting a marina have totally different interests than the other target groups. A client who does business or has meetings on board needs special facilities on board and in the marina. For more information about corporate clients please refer to paragraph 7.6

Like Dutch people, Chinese want to escape the city from time to time. For most Chinese this means that they need to travel far from home. They will probably make a daytrip to go yachting and enjoy the facilities in the marina. Besides the basic facilities such as restrooms and boat rental they might need facilities such as a playground, a restaurant, a barbecue site and a shop.

Segmentation in society

The Chinese society is becoming more and more segmented. The difference between rich and poor people is growing. The majority of the upper class prefers to be separated from other social classes. They want to show off their status by taking part in exclusive activities like yachting together with people of similar social standing. This target group asks for luxury facilities and a complete set of services. People with such interests are willing to pay a higher membership fee to be separated from the 'public'. The upper class probably will not be satisfied with a yacht club that has a public marina on the same location. That would decrease the status of the marina (Sun and Yu, 2005).

7.4 Travel distance

To choose a good site for a new marina it is essential to know whether people are able and willing to travel to that location. This depends on two factors: accessibility and distance. Lets have a closer look at the maximum distance potential visitors accept. Mister Pu, professor in land use planning says it is hard to estimate. If people own a car and if they are interested in visiting a place, distance does not matter very much. They will drive to a marina regardless of distance or travel time. It is very convenient to travel by car in the provinces of Shanghai and Jiangsu (Northwest of Shanghai). Outside the cities traffic jams are not common and there is a good expressway network (interview Pu, 2005). On average, people accept a single-way travel time of about two or three hours by bus or car. Experts from different backgrounds (tourism, urban planning and sociology) agree on this.

The Chinese regard cities with three million inhabitants as small. They are not very exiting and there is not a lot to do. Very big cities like Beijing and Shanghai have respectively sixteen and seventeen million people. These sizes give an idea about travel distances within the city and to the countryside. In large Chinese cities it is common practice to travel long distances. For example, crossing Shanghai city (within the inner ring road) takes about one hour by car. Chinese cities are much bigger than Dutch cities and they have a greater sprawl. Because of relatively long travel times Chinese prefer to go out for a whole day or two days instead of only half a day (Sun and Yu, 2005). Mister Xu supposes that there is a large group of urban residents with little free time. They prefer a location close to their home. Urban areas are generally more accessible and closer to the places where the majority of the people live. Planning part of the water sport facilities in or close to the city center seems therefore necessary.

7.5 Trends in the Chinese society

Various aspects of the Chinese society are changing rapidly. In relation with water sport the changing amount of free time, the consumption pattern and recreation pattern are interesting.

Amount of leisure time

The opportunity to take paid days off is nowadays used by a small percentage (10-20%) of the white-collar workers. Mister Xu expects this percentage to grow in the near future. People will consider free time a right, as something valuable. More and more people, young persons in particular, enjoy a growing amount of leisure time. This kind of social change is more prevalent amongst the younger generation (Sun and Yu, 2005). However, the great majority of the Chinese population still prefers to have less free time in exchange for more earning potential (interview Xu, 2005).

Expenses

The expenses of a household on recreation are strongly dependent on the total income. There are great differences in income in China. In urban areas in Shanghai the average total income per capita is twice as high as the figures for similar areas in Liaoning and Hainan. Figure 27 shows the income in nine provinces at China's East coast. The provinces are ordered from North (Liaoning) to South (Hainan). Map 10 on page 76 shows the location of the provinces.

Income of urban households by province

Province	Average total income per capita in RMB	Disposable income per capita in RMB
<i>Liaoning</i>	749	693
<i>Tianjin</i>	1014	937
<i>Shandong</i>	864	798
<i>Jiangsu</i>	984	907
<i>Shanghai</i>	1575	1418
<i>Zhejiang</i>	1352	1226
<i>Fujian</i>	994	908
<i>Guangdong</i>	1282	1161
<i>Hainan</i>	660	616
CHINA	865	800

Figure 27: Income in coastal provinces (from North to South).
(website National Bureau of Statistics China, 2004)

Nowadays the average monthly income per capita in Shanghai is 1575 RMB (National Statistics Bureau, 2004). Professors in sociology expect that the monthly income in Shanghai will rise up to 2000 – 3000 RMB within five years (Sun and Yu, 2005).

When the income increases Chinese people are expected to save the extra money to buy a house in the future. Renting is not popular in China. The most important thing to own is a house. The second priority is education for children as well as adults. It is very important to enlarge knowledge and improve personal status. Extra money will be spent on a car in the third place. In the fourth place people will choose a more expensive house (in case they owned a house already). If there is still money left it will be spent on luxury goods. Chinese tend to buy relatively expensive luxury goods if they are for long-term use. Lastly, part of the income will be spent on recreation (Sun and Yu, 2005).



If this priority list is valid for all target groups the result is that only rich people spend a significant amount of money on recreation.



Map 10: Provinces of China (www.google.com)

The before mentioned consumption pattern is changing. Within thirty years from now the upper-middle class is forecasted to spend much more money on their holidays. In practise this means that at least once a year they will fly to a destination and stay for one week. This requires at least a double income of two times 3000 RMB per month (Sun and Yu, 2005). The consumption pattern is also influenced by changes in the demographic structure of the Chinese population. Parents that are single child themselves are allowed to have two children nowadays. Couples who choose to have two children will inevitably have higher costs in child support expenditures as opposed to those couples that only have one child. However, this is not very bad news for the tourism industry because the professors expect that families will still have enough disposable income for recreation because the average income is growing (Sun and Yu, 2005).

Social change and the popularity of water sport

Recreation patterns change. The trend is that people travel more frequently but a shorter time per holiday. It is common to go out every weekend and people take long distance trips once or twice a year during the national holidays (interview Xu, 2005). Not only is the recreation pattern is changing but also the way in which Chinese tourists organize their trips. Traveling by tour group with a fixed program has always been very common. Independent travelers are also gaining in popularity. Young people especially like to go on their own without being constrained by an itinerary and a tour guide. (Sun and Yu, 2005). Renting a yacht and sailing wherever you want is the ultimate example of independent tourism. Besides changes in the pattern and organization of recreation the type of recreation is Westernizing as well. As discussed before, many people do not go out to relax. Nevertheless people pay more and more attention to relaxation. Mister Xu believes it will take about five or ten years before 'relaxation-recreation' is popular. Urban Chinese adapt Western lifestyles and activities very fast and easy. Young people are particularly interested in Western life styles. "They love Western bars, sports and clothes" (Sun and Yu, 2005). Xu agrees on this but he expects that it will

take a relatively longer time for the same trend to occur in the case of water sport (interview Xu, 2005).

With the before mentioned changes in mind, all experts involved in this research share the opinion that the development of yachting and other water sports can become a success in Shanghai and the surrounding provinces. Some people think it will be a matter of five years, others think it will take ten or fifteen years before the Chinese are familiar with water sports. It is important to realize that social changes are taking place rapidly in that region (interview Pu and Wu, 2005). With the last sentence in mind it is likely that the development of yachting will be widely spread within ten years.

7.6 Target groups

Target groups can be defined by means of demographic segmenting. This means that the market is divided into groups based on measurable personal characteristics such as age, income, family size, occupation and place of residence. The four most important target groups for water sport in China are described below.

1. *Chinese middle-class*

First of all the question arises whether the Chinese middle class can afford to take part in yachting. Mister Xu says a reasonable price to rent a motorboat for two or four persons is 50 RMB for fifteen minutes. Another source, professors in sociology, suggests 500 RMB to rent a boat for a day for a couple or a family. Compared with other expenses on recreation these prices are not exceptional. If people go out for a nice dinner they can easily spend 3000 RMB for ten people. That is something people can do once a month or even more often (Sun and Yu, 2005). Mister Xu says the cost of yachting is not a big issue. The problem is that the existing facilities are mainly for upper class Chinese. The middle class is not yet a target group in the market. This will take about five or ten years (interview Xu, 2005).

A second question is how much time people can spend on yachting. Within the middle class there are people with different amounts of free time. This affects their choice of holiday location. The results from the interviews and the questionnaire show that many Chinese are interested in outdoor recreation. They love to go to the countryside to enjoy natural scenery and people with enough free time will do so. Others with less free time rely on marinas in the urban area close to the place of residence.

2. *Chinese upper class*

Two to three percent of the Chinese population belong to the 'upper-income-class' (interview Pu and Wu, 2005). The average age of this target group is likely to be higher than the middle-class because most people have to work for many years before they can make a career. People within this target group who are interested in showing-off their wealth are willing to pay a very high membership fee for a yacht club. Since they want to do something exclusive, they accept a price that excludes the middle-class from participating. In chapter 2.2 the concept 'quality tourism' was discussed. This concept is suitable to serve upper affluent customers who want to be separated from the public and enjoy high quality facilities.

Within the Chinese upper class there are people with ample money and free time. They can afford to visit an expensive yacht club at any time and at any location. On the other hand there are people who are workaholics and earning high salaries or incomes, resulting in less free time. For them it makes sense to choose a yacht club that is situated closer to their place of work or residence.



3. Companies

For Shanghai, corporate yachting has good opportunities because there is a very large target group. There are many foreign enterprises and successful Chinese companies (interview Xu, 2005). Companies can use water sport facilities for different purposes. Some companies make an arrangement so that their employees can use the facilities for recreation. A more common option is business use: companies invite their clients to a marina to do business during a boat trip or in the marina. Except for recreational use, company yachting requires specific facilities. For example: meeting rooms, ICT facilities and private rooms in restaurants. Last but not least, all facilities and services have to be representative.

4. Expatriates and Western tourists

In general expatriates and Western tourists are rich compared to local standards. Most of them who visit a marina are dedicated sailors or at least familiar with water sports. They pay more attention to the sailing area and the natural scenery than to side activities and entertainment. The majority of Dutch expatriates have less free time than their colleagues in The Netherlands.

Cost and awareness

It is necessary to know whether there are enough people who can afford to rent or buy and maintain a yacht. It is interesting to know how much money people are willing to spend during one day of yachting. Secondly information is needed about the type and size of the yachts. This information is useful when a marina is being designed. If the great majority is interested in renting relatively cheap motor yachts it will not make sense to design a marina for large sailing yachts.

The questionnaire was held at the Shanghai International Boat Show. Visitors of this exhibition are people who are at least a bit familiar with yachting. The questionnaire was held to get to know more about how much Chinese are willing to spend on yachting and what their overall idea about yachting is.

196 people responded to the following question:

"What is negative about yachting?"

- It is dangerous because I cannot swim*
- I don't like to be sun burnt*
- It is expensive*
- It is boring*

In case a respondent thought there is nothing negative about yachting the boxes were left blank. The results are shown in the figure below.

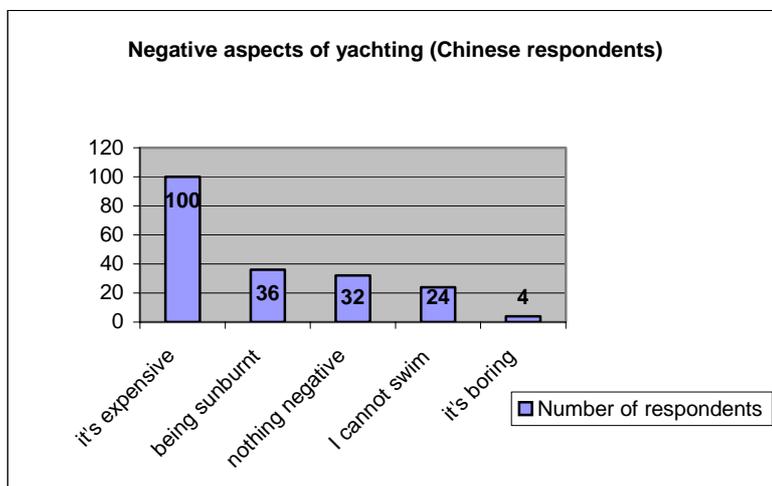


Figure 28: Negative aspects of yachting (own source)

It is very clear that high costs are the most negative aspect of yachting. More than 50% of the respondents chose this from a list of possible negative aspects. At the same time it turned out that many respondents have no idea about the cost of renting a boat (figure 29). If respondents indicated the price that they are willing to pay, it is generally a high amount of money: more than 999 RMB per person for one day that is equivalent to approximately 100 Euros. A reason for these thoughts could be that people regard yachting as an elite sport. "In fact, it does not have to be like that" said Mister Van der Laarse of the Shanghai Boat & Yacht Club. Professors in sociology and consultants from DHV Environment & Transportation agree with Van der Laarse. Besides his club there are other places where people can rent a motorboat for a reasonable price.

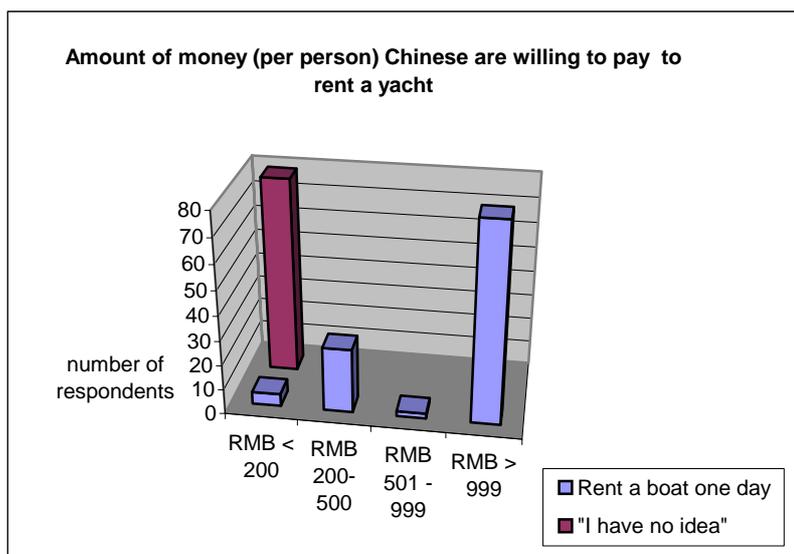


Figure 29: Price Chinese customers are willing to pay to rent a yacht (own source)

It is likely that the respondents know more about yachting than the average Chinese since they were visitors of the Shanghai International Boat Show. Even within this group it seems that a large amount of people has no knowledge about the cost of yachting.

The respondents are relatively young people (figure 30). Almost one third is under the age of 30. Their interest in yachting and the fact that they are the future market makes them an interesting target group for promotion and education about yachting. Additionally, young urban people are open to Western lifestyles and interested in Western ways of recreation. For those reasons professors in Sociology and Tourism say university students are an interesting target group for promotion. And in the future they will belong to the middle- and upper class (Sun & Yu and Wu, 2005).

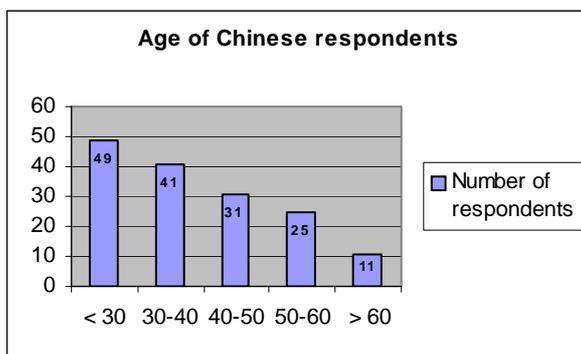


Figure 30: Age of the Chinese respondents.

Total number of respondents: 157 (own source).



7.7 Conclusions

Future outlook

These days the yachting business in China is mainly focused on the upper-class customers who are older than forty years (interview Pu and Wu, 2005). It is a niche market consisting of rich Chinese, expatriates and companies. The greatest sales are expected from these target groups. However, the Chinese middle class forms the largest potential market because of its rising average income and massive size. Unfortunately the majority of the Chinese population is not yet very familiar with water sports and they are not very interested in it. On the other hand people are searching for outdoor recreation in nice natural places. Water sports could satisfy those needs and provide a kind of autonomous recreation for those who are interested. Some specialists in the field expect that the Chinese middle-class will be ready for yachting within five years. Others estimate that it will take about fifteen years from now. According to Mister Van der Laarse, from the Shanghai Boat and Yacht Club, motor boating will take off first as it is easier to drive a powerboat than a sail yacht. He is convinced there is potential for sailing as well. Education and training of the general public are keys to developing this tourist industry (interview Van der Laarse, 2005).

Promotion and education

As mentioned before, it seems that many Chinese are not well informed or have a wrong idea in mind about yachting. People who are financially able to take part in 'basic' yachting (renting a small boat) think that it is too expensive for them. In order to develop a yachting industry with a wide basis it is necessary to change the minds of the current and future middle class. Because the middle class Chinese will be by far the largest target group for water sports.

Promotion can make people aware of the different possibilities yachting has to offer. Education about prices and locations is needed to attract more Chinese to the water sport lifestyle. At the moment it seems that many people have little knowledge about yachting, just a vague picture of an expensive elite activity.

Differences with The Netherlands

The current yachting business in China serves the upper class Chinese, expatriates and rich tourists. This is different from the situation in The Netherlands where many marinas focus on families, children or the middle class recreational boaters. In the North of the country especially, boating can be affordable for relatively low incomes. Another difference that is interesting in relation with spatial planning is the fact that Chinese accept longer travel distances than the Dutch. Compared with people in The Netherlands the Chinese have less free time. In spite of that they complain less about travel time.

The sixth sub question mentioned in chapter one was:

How do Chinese people want to spend their leisure time and what is the profile of the target groups for water sports?

More and more Chinese are searching for Western kinds of leisure. Moreover, outdoor recreation and recreation at the water front are popular. Current target groups for water sport are rich Chinese, companies and expatriates. Within five or ten years, the Chinese middle class is an interesting target group. The middle class should be served with motor yacht rental and a wide range of basic facilities.

Chapter 8:

Chinese case studies

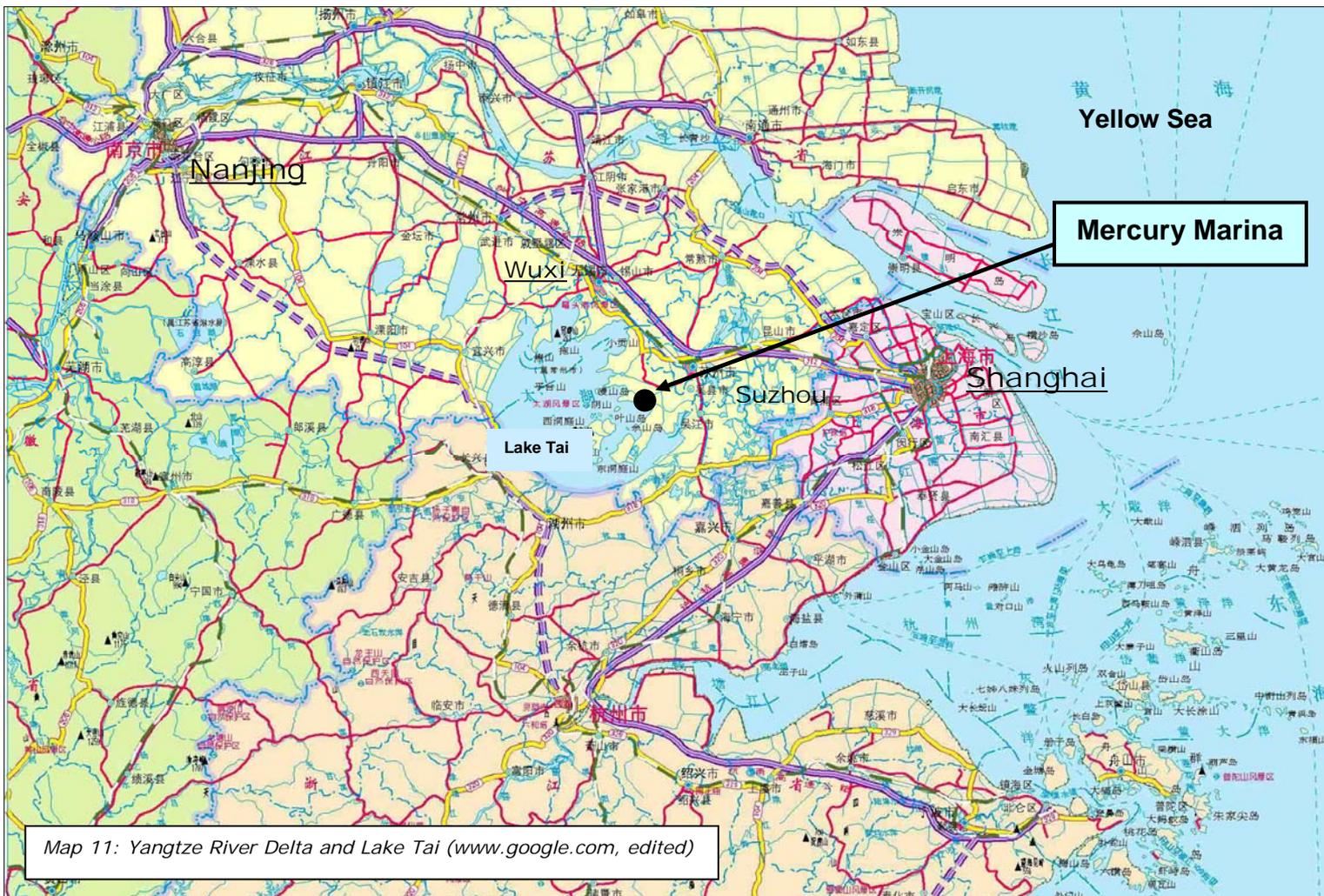
To have an idea about what yachting in China can be today, two very different yachting facilities are described. They are both located at inland waters not far from Shanghai.

8.1 'Suzhou Taihu Mercury Club & Marina'

Location

Suzhou Taihu Mercury Club & Marina, or in short 'Mercury Marina', is situated in Jiangsu province. The marina is located at the East side of Lake Tai, 100 kilometers from China's East coast and 32 kilometers from the city of Suzhou. The map below shows the province of Shanghai in pink, Jiangsu province in yellow and Zhejiang province in a light orange color. Lake Tai is the third largest freshwater lake in China with a surface of 2400 km² (International Lake Environment Committee Foundation, 1999). In Chinese the lake is called 'Tai Hu'.

There are many places to sail to on and around the lake. Close to the marina sailors can stop at Mercury Island: a little island made from the sand that was dredged during the construction of the marina. Furthermore, there are another 20 sites and destinations recommended by the marina. Among those are temples, islands, restaurants, gardens and traditional houses.



Map 11: Yangtze River Delta and Lake Tai (www.google.com, edited)



Dams control the water flux in Lake Tai and the available water depth in the lake is between two and three meters. It is said that Lake Tai has one of the best waterside scenery in China (website International Lake Environment Committee Foundation, 1999).

Spatial planning aspects

Mercury Marina is situated within the 'Suzhou Taihu National Tourist and Holiday Zone'. The accessibility is good because it is situated along the main road from Suzhou to the East side of the lake. Most visitors come by car. The marina provides transportation from Suzhou for members without a car. It took a large amount of time and effort to select a site for the marina and to develop the whole project. Finally this site was chosen because it is naturally sheltered, close to Suzhou and Shanghai, and is part of the Tourist and Holiday Zone. The management of the marina was satisfied about the relationship with the local government during this process (interview Browne, 2005).

From Mercury Marina it is allowed to navigate on Lake Tai. The land surrounding Lake Tai belongs to different municipalities that issue their own licenses for navigation. Yachts from Mercury Marina, belonging to Suzhou Municipality, are not allowed to moor in the administrative area of Wuxi (see map 11 on page 81) or Huzhou, South of Lake Tai. Another restriction is that it is forbidden to enter the canal system around Lake Tai.

Spin-off

Other enterprises in the yachting industry have established in the area. Mercury Marina is not the only place where people can moor or rent a yacht. There are several other places that rent small motorboats and there are some residential complexes with a private marina or private berths. Besides that there is a residential complex with private marina and there are about 100 houses under construction with private berth or marina (interview Browne, 2005).



Figure 31: The basin and Lake Tai (Suzhou Taihu Mercury Club & Marina, 2005)

The marina

The construction started in 1995 and the facility was officially opened in 1998.

There are four piers and 144 berths. Members can moor their own yacht in the basin. Another possibility is to rent a yacht or one of the houseboats. There are special prices for members and some yachts are only available for them. A price list for boat rental and membership fees can be found in

appendix 6. Clients are allowed to drive pontoon boats and speedboats with a boat license. Members can drive a Jet Ski or water mouse after completing a little training. It is possible to learn how to drive a motorboat at Mercury. People who finish the course successfully receive a Chinese boat license. In case people do not know how to swim it is required to take swimming lessons at Mercury Marina first. Practically all members are interested in driving lessons (interview Browne, 2005).

The complex at Lake Tai has show rooms for yacht sales and Mercury engines. This is the only Mercury Marina in the world. The facility differs from marinas in Western countries because it is designed for the Chinese market. There are special elements for the Asian customer such as a Mahjong table, karaoke, dragon boats and Asian dishes in the restaurants. There are typical Western aspects too: billiards, Western food, motorboats and Jet Skis. There are activities every weekend. The marina management organizes games, karaoke rooms, barbecue, movie nights, etc. Besides this there is an annual dragon boat race. Last year about 3000 people visited that event (interview Browne, 2005).

In terms of future development, the company is working on setting up a sailing school. Mercury Marina would like to co-operate with other marina developers to offer their expertise and management.



*Figure 32: Main building of Mercury Marina
(Suzhou Taihu Mercury Club & Marina, 2005)*



*Figure 33: Dragon boat race
(Suzhou Taihu Mercury Club & Marina, 2005)*

Target groups

The club has a little over 400 members. A large majority is Chinese and the others are from different foreign countries with different cultures. Mister Browne, the general manager said: "Mercury Marina is for all kinds of people". Nevertheless the majority of the members are upper class Chinese or Chinese corporate member. Events like the annual dragon boat race are visited by various kinds of people. Most members come from Shanghai, others from the big cities in Jiangsu province: Suzhou, Nanjing and Wuxi. Nanjing is about 250 kilometers from the marina, clients from Wuxi need to drive 75 kilometers and to downtown Shanghai it is approximately 120 kilometers. Most people visit the marina for one day or one weekend.

Promotion

Mercury Marina is being promoted via all kinds of media channels. The Tourist Information Office is currently not involved with the promotion of Mercury Marina but there are plans to change that.

Mercury Club and Marine is working together with the Suzhou Government and the Taihu Vacation Zone to further develop the leisure boating industry on Lake Tai.



8.2 Shanghai Boat and Yacht Club

Location

The Shanghai Boat & Yacht Club (SBYC) was founded in 2001 and, since 2003, SBYC has been located at the current site which is situated at the East side of Dianshan Lake, see map 12 on the next page. The first two years were spent at another location at the South of Dianshan Lake. (www.shanghaibyc.org). It is a lake of 66 square kilometers located West of Shanghai City on the border with Jiangsu province. It takes about 45 minutes by car from downtown Shanghai. That is much less than the generally accepted travel time for Chinese people. The club provides transportation by minibus from downtown Shanghai to the lake. Van der Laarse, secretary of SBYC, thinks members do not care about the distance very much as long as transportation is provided. It would not matter if the trip would be a little longer.

The lake is two to three meters deep but at some places only one meter. The lakeshore is green and, except for some tourist attractions, the surroundings are rural and quiet. Visiting the area is a good way to escape the crowded, concrete city of Shanghai. The lake is nice for sailing as well as motorboats. Sailing routes are limited because it is not allowed to sail on inland waters nearby.

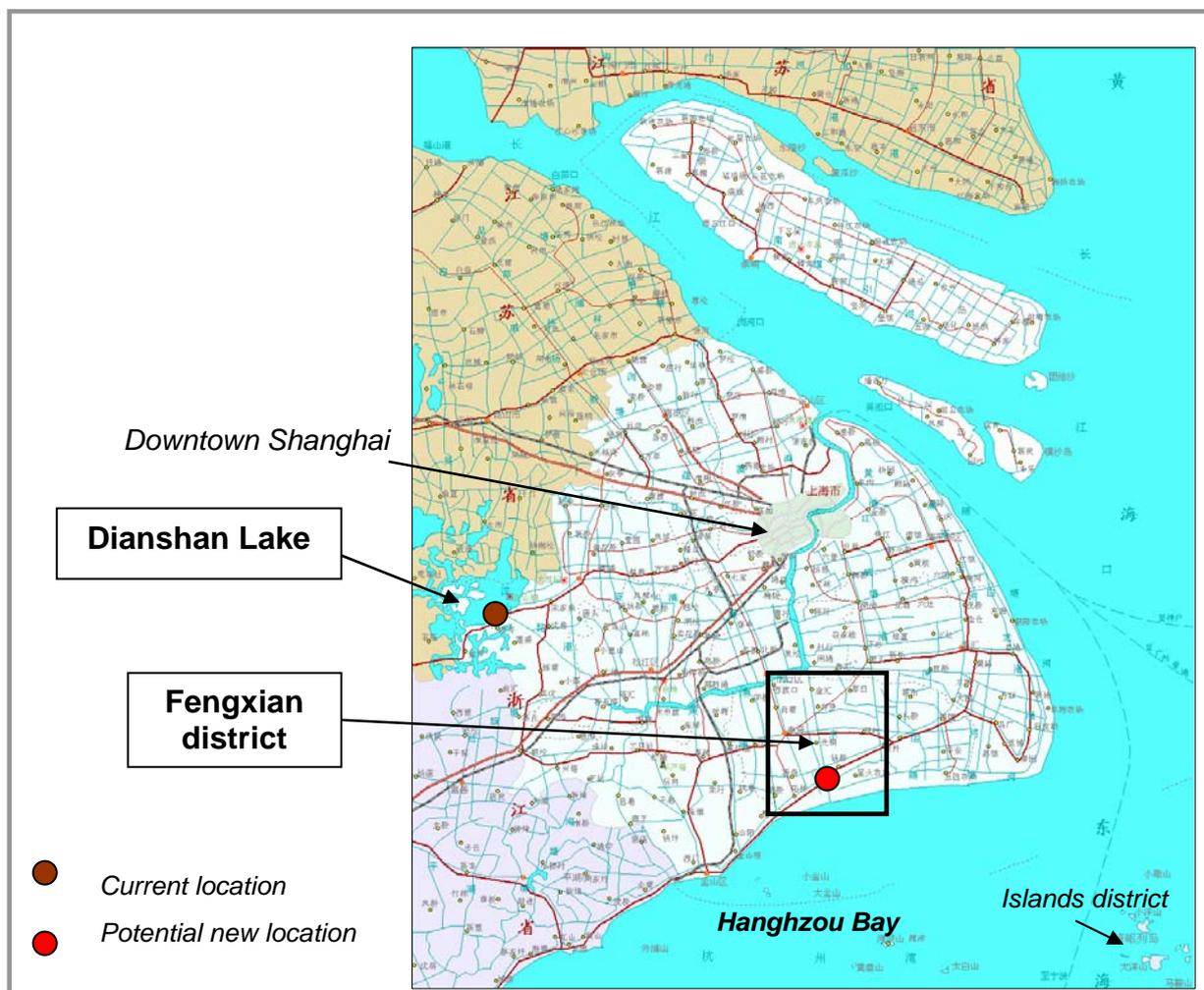
It was not necessary to establish land ownership or to lease waters from the government because the SBYC uses the facility that is government owned. In 1983 the Shanghai government built a water sports facility on Dianshan Lake to provide good facilities for the Olympic rowers. In March 2004 the Shanghai Boat & Yacht Club moved its boats to the new Shanghai Water Sports Center (SWSC) (www.shanghaibyc.org)



Figure 34: small sailing yacht from the Shanghai Boat & Yacht Club (own source).



Figure 35: dinghies stored on land at the Shanghai Boat & Yacht Club (own source).



Map 12: Location of SBYC (www.google.com, edited).

Facility

As said before the Shanghai government built this basic but adequate facility. There is a ramp, a few berths, toilets and a small shop selling drinks and snacks. The club has five dinghies for common use that can be sailed without a license. There are ten members owning a yacht. The dinghies are stored on land in the open air. Shanghai Water Sport Center has about 100 dinghies that are stored under trees. The SWSC owns some berths where they moor their coach boats. There is a brand new empty building as well. The SBYC would like to use it as a clubhouse. The Water Sport Center agreed on this but the SBYC is not yet allowed to move in. Besides the yacht club there are windsurfers practicing and there are rowing courses for professional and semi professional rowers. The club officers try to organize a race every Saturday. Unfortunately the races have been canceled on many occasions because of government regulations and interference (interview Van der Laarse, 2005).

Target groups

The Shanghai Boat & Yacht Club does not have a sailing school. They only provide training for children of members that are younger than 15 years. So the target group only includes people who can sail. In general, the Chinese are not very interested in sailing. If they contact the SBYC it turns out that they just want to do an outdoor activity. That seems to be the most attractive aspect about sailing. It is not the navigation that attracts them or the fact that they like water or a sport with social status but rather they simply like outdoor recreation.



Members

The club has over 80 members from about 20 different countries. Most members are expatriates and only ten percent are Chinese. At the moment all but one member are living in Shanghai. Since its foundation the club has had Chinese members. There are individual members, families and corporate members. Many of the non-Chinese are living in Shanghai on temporary basis. People come and go so the club does not have a constant group of members.

Many members only visit the lake when the weather is nice. Some others, the twelve dedicated members sail all-year round. In the summer they go every weekend and in wintertime once every two weeks. There is more wind during the winter period so the conditions are better for sailors who search for a challenge.

Promotion

The Shanghai Boat & Yacht Club was founded with the mission of promoting and facilitating the sport of sailing for its members and the Shanghai community (www.shanghaibyc.org). In order to do so, several promotion activities were organized. The club had a stand at the Shanghai International Boat Show to provide information and to recruit new members. Shanghai Television and Dragon TV broadcasted three times a television program about SBYC. Furthermore, expatriate magazines wrote about the club, which brought new members. And once a month an 'open day' is organized. On average, 10-20 people show up but in June 2005 the Shanghai Daily wrote an article about SBYC just before an open day. At that day a record number of 75 people showed up. Besides the regular open days there are special days for companies.



Figure 37: mooring a dinghy at the Shanghai Water Sport Center, the location of SBYC (own source).

Future outlook

SBYC is growing and there is big potential for the sport to gain popularity in Shanghai. Not too many promotion activities can be organized because the club does not have enough boats to host a lot more people. There is a shortage already. Sometimes 25 people want to go sailing but there are only five dinghies for three to four persons. The members would like to have their own clubhouse and more freedom to organize races and other activities. Furthermore, there are some enthusiastic members who would like to sail at sea. From the current location it is practically impossible to reach the sea. The club has plans to move to Fengxian district, south of downtown Shanghai. In the south of Fengxian district is a great variety of sailing areas: a small waterway network, open sea (at Hangzhou Bay) and the island district in the Yellow Sea can be reached in half a day.

SBYC is in the process of getting its own clubhouse and, hopefully, it will be able to operate more independently at its new location.

8.3 Plans for Shanghai

Various governmental bodies are working on the development of water sport regions. This paragraph briefly describes two development plans

The first marina at the Huangpu River

The first marina that will be developed by the Huangpu Riverbank Development Commanding Office will be situated at the East side of the river at the mouth of the Huangpu river. That is the Northern part of the river, where it flows into the Yangtze River. The most important reason why the site was selected is because it is as far as possible from the busy commercial vessel traffic on the Huangpu River. On average 350,000 commercial ships navigate on Huangpu river per day. From the site at the very North of Huangpu River, good sailing routes to the Yangtze River and the sea can easily be undertaken. In future it might be possible to navigate on Huangpu River with a pleasure craft when commercial traffic gets less crowded (interview Zhu, 2005).

The development of the marina is part of a greater development project concerning the banks of the Huangpu river. The government is the major shareholder. At the moment the government is looking for private and public investors. The project is in an early stage of development and for that reason there has been no detailed study about target groups yet (interview Zhu, 2005).

Fengxian district: the first 'Yachting City' in China

According to professor Ma from Fudan University in Shanghai, the district Fengxian has the most promising development plan of the plans created by the non-metropolitan districts of Shanghai (interview Ma, 2005). The Fengxian government wants to become the first 'Yachting City' in China. To achieve this, they planned to build five marinas, a man made lake, villas with private berths. According to the development plan, the five marinas will be public marinas. These marinas will be designed to serve the middle class Chinese. The villas with private berths are for high incomes. Four out of five marinas will be situated in an urban setting; only one marina is planned in a non-urban area (interview Dai, 2005).



Map 13: location of Fengxian and Huangpu river marina. (source: www.google.com)

8.4 Conclusion

The seventh sub question mentioned in chapter one was:

What are the characteristics of current marinas in China?

Mercury Marina is a full-service marina catering mainly for rich Chinese, tourist and companies. There are no sailing yachts in the marina. A luxury yacht club like Mercury Marina is rare in The Netherlands.

The Shanghai Boat & Yacht Club provides basic facilities for a low price. The members of the SBYC only use sailing yachts. The club is managed by expatriates and the great majority of the



members are expatriates. There are more marinas similar with Mercury Marina than yacht clubs like the 'Shanghai Boat & Yacht Club. For example, marina 'Nanjing Galaxy' in Nanjing (province of Jiangsu) and Longsheer Yacht Club in Shenzhen (province of Guangzhou) have a concept that is more similar with Mercury Marina than with the SBYC.

Chapter 9:

Comparison

In this chapter, the Dutch and the Chinese markets, legislation and spatial planning are compared. There is special attention for the socio-economic criteria for spatial planning of water sport facilities and the question whether they are applicable in China or not.

9.1 Water sport in The Netherlands and China

The Netherlands have a water sport culture with a long history. Water sports are very popular among all income classes and 29% of the Dutch population sail at least once a year. Although the Chinese do not have a water sport culture, their attitude towards water is positive. Swimming and visiting the waterfront are popular activities. The majority of the Chinese people is not yet very familiar with water sports and has no strong interest in yachting. The current yachting business in China serves the upper class Chinese, expatriates, companies and rich tourists.

The Chinese society is changing rapidly. The average income is growing, the standard of living is rising, people are enjoying more and more leisure time and Westernization and modernization are changing the society. All of these changes have a positive impact on the development of water sport towards a common leisure activity. Specialists expect that the water sport industry will grow because of the before mentioned transformations in society and since people are searching for outdoor recreation in natural places. Water sports could satisfy these needs and provide a kind of autonomous recreation for people who prefer that. Young people are trendsetters in adapting this new leisure activity.

One of the most important success factors of the Dutch water sport world is the existence of affordable water sport facilities operated by non-profit organisations. In China hardly any non-profit organisation exist in the water sport industry.

9.2 Legislation and control

Negative impacts of water recreation should be prevented and fought against by means of legislation and control. Water sport areas need specific regulation and control. It is necessary to control speed, bilge water dumping, use of motor yachts in environmentally sensitive areas, use of boat anchors on coral reef, fishing and collection of live seashells and coral, etc. (World Tourism Organization, 1994).

There are many differences between legislation in The Netherlands and China. These are some examples:

1. In China a license is required for all yachts with mechanical propulsion. On Dutch waters a licence is required for ships with a length over fifteen meters and ships that can sail faster than 20 kilometers per hour.
2. In China, the compulsory diving license is a commercial shipping license. The course takes about one month. In The Netherlands there are special licenses for pleasure crafts.
3. In China there is no speed limit for pleasure crafts. In The Netherlands it is generally forbidden to sail faster than 20 kilometers per hour. Authorities in charge can assign waters where it is allowed to go faster or where the maximum allowed speed is lower.
4. In many Chinese regions it is not allowed to enter the canal systems. This is the case, for example, in the surroundings of Dianshan Lake and Lake Tai. In The Netherlands practically all canals and inland waterways are open for water tourism. Only environmentally sensitive areas are sometimes (temporary) closed.



5. In China, various municipalities issue their own licenses for navigation and design their own rules for pleasure boats. In The Netherlands basic regulation is centrally designed and only some areas have special rules.
6. In China, all yachts have to be registered by the government and this can cost up to 10,000 RMB (or 1000 Euro) per year for a small speedboat. In The Netherlands, only yachts longer than 15 meters or yachts that can sail 20 km/h or faster should be registered.
7. In the Shanghai region yachts have to pay a channel-maintenance fee to the Shanghai Municipal Navigation Administration. In The Netherlands such a fee does not exist.
8. In contrast with China, The Netherlands have a very extensive set of environmental legislation.

In China there is not yet sufficient regulation and control. In order to avoid problems, unsafe situations and damage to the environment, regulation for pleasure crafts and marinas should be introduced. The long time experience with water sport regulation in The Netherlands shows that it is best to design basic regulation for the whole country. Specific regulation can be added for areas with extraordinary circumstances. Since China is a very large country compared with The Netherlands, design of regulation per province or large sailing area seems to be more suitable than on national level.

9.3 Promotion

In The Netherlands promotion is not necessary for water sports unions. For commercial marinas it is important. Due to the fact that not many Chinese are familiar with the water sport industry, promotion is of great importance. It turned out that many Chinese are not well informed or have a wrong idea in mind about yachting. People who are financially able to take part in 'basic' yachting (renting a small boat) think that it is an expensive elite sport, not affordable for them. In order to develop a yachting industry with a wide basis (meaning various target groups) it is necessary to change the minds of the current and future middle class. In particular because the middle class Chinese will be by far the largest target group for water sports. The young generation (university students) is the most important target group, because they can be part of the middle class within ten years (interview Xu, 2005).

Promotion of water sport should not only focus on potential customers but also on the government. Governments should be educated about the potential revenue for their administrative region and the attractiveness and identity they can create by becoming a 'water sports region'.

9.4 Criteria for spatial planning

In chapter 5 criteria for spatial planning of water sport facilities in The Netherlands were described. Although the same criteria are valid for the Chinese situation, there are differences in focus and differences on short and long term. This is explained below for each criterion.

a) Location in the regional economy

In terms of 'marina density' and competition in an area the situation in China differs a lot from the Dutch case. In China there is hardly any competition within water sport areas because the few Chinese marinas that currently exist are spread over a great part of the country. However, in the future this issue will be very important.

Another aspect of this criterion is the accepted travel time of the target group. It turned out that Chinese people accept a travel time of three hours single way, while the average Dutchman is willing to drive two hours. When a longer travel is accepted, the facility could be build further away from the target group. This means there is a greater area available for site selection.

b) Regional economy structure

The economic situation in the region is of great importance. In case there are many expatriates, foreign tourists or rich Chinese in the region that means there is a large potential of customers. The profile of potential customers in China is different from The Netherlands, since in The Netherlands the majority of the sailors belong to the middle class. Furthermore, it is essential that investors and potential operators are present or at least willing to move to the region to start business there. In China practically all land is government owned, so support of the government is in most cases essential. Generating positive spin-off and contribution to strengthen the regional economy can enhance government support.

Another very important issue is that the development of a water sport facility has a great chance to succeed when it is part of a greater development project. Since there are not yet many marinas that proved their success in China, many governments do not appreciate separate marina projects. They prefer marinas being part of a greater project, especially real estate projects. For example: a marina could be part of a tourist resort or a new developed residential area (interview Xu, 2005).

c) Conflicts with legislation, plans or current functions

In The Netherlands there is a greater set of legislation and governmental plans to take into account than in China. Especially environmental legislation can be restrictive for many projects in The Netherlands. In China there is less restrictive environmental legislation regarding water sport facilities.

In most Western countries establishing land ownership is one of the first things to take care of. In China this is not possible in most cases since all land is state-owned. Even leasing is an uncommon option. For this reason it is essential to convince the government of the feasibility, profitability and positive impacts of the proposed project.

In China site selection is not always based on decent research. It happens often that government officials in charge of site selection are influenced by developers. Good connections with government officials can be helpful to realize the project (interview Xu, 2005).

In many Dutch site selection processes environmental legislation is restrictive. This is not common in China since the set of environmental laws regarding water sport facilities is less extensive and less restrictive. In many Chinese cases, heavy industry is a restrictive component. There are many industrial estates scattered along China's East coast. They pollute the water, generate busy traffic on the waterways because of commercial vessels and industrial plants are unattractive element in the area.

d) Accessibility over land

For Dutch people accessibility by car is the most important. In China, this is different for various target groups. High-class Chinese and corporate visitors mainly come by private transport (private car or private van). Most of the middle-class people visit water sport facilities by public transport.

e) Location in the waterway network

In The Netherlands, the location of a water sport facility in the waterway network is the most important criterion for spatial planning. The greater the variety in water systems, the more interesting is the area. Currently and in the near future, this is of less importance in China. Chinese sailors search for places to sail to but most of them do not make such long trips like Dutch people do. Yachting holidays are not popular yet in China.

Since the development of water sports in China is in an early stage, there is not a great chance that water sport areas will be overcrowded in the near future. This will be an important issue in the future. Especially due to the high population density along China's East coast.



f) Attractiveness of the landscape at the site or in the region

A shared preference of Dutch and Chinese people is a sailing area outside the urban area. Recreational boaters in both countries search for beautiful landscapes and nature. All of the marinas in the Dutch and Chinese case studies are located outside the urban area at a lake with natural landscapes.

For China this criterion is of even greater importance than in The Netherlands. This is because Chinese people spend more time in the marina than Dutch people. Especially the attractiveness of the site and the marina itself is important since corporate yachting has a large share in the total marina use in China. Companies appreciate the business facilities at the marina highly.

g) Ratio between price and quality & services

The current yachting business in China serves mainly the wealthy Chinese and companies. This is different from the situation in The Netherlands where many marinas focus on families or other recreational boaters from all income classes. The situation in The Netherlands has become like that thanks to the numerous water sport unions that offer basic facilities for a low price.

In China there is a stronger separation in the society than in The Netherlands. This can have impact on the choice of marinas by rich people. A significant part of the rich people prefers to do something exclusive. They are likely to choose a high-class marina that excludes the lower and middle-class. In that case mixing social classes is not appreciated or not accepted. The figure below shows what kind of marina different Chinese target groups and Dutch target groups prefer.

	Range of services / facilities	Facilities	Parking lot/public transport	Motor boat/ sailing yacht	Location
<i>High class Chinese</i>	Wide	Luxury	Parking lot	Large motor yacht	Natural or urban
<i>Middle class Chinese</i>	Wide	Basic	Public transport	Small motor boat	Natural
<i>Foreigners</i>	Small	Basic	Public transport	Sailing yacht	Natural
<i>Companies</i>	Wide	Luxury	Parking lot	Large motor yacht	Urban

Figure 38: Chinese target groups and the preferred marina profile (own source).

The case study ‘Suzhou Taihu Mercury Club & Marina’ is a high-class yacht club with a high membership fee. It is a commercial marina catering mainly for rich Chinese, foreigners and companies. The marina offers a wide range of luxury facilities. There are only motor yachts in that marina. Most clients visit the location by car. The other Chinese case study, The Shanghai Boat & Yacht Club, is a non-profit organization that uses a small, basic facility with only primary facilities. Because of this profile the club has a low membership fee. The members of the Shanghai Boat & Yacht Club are mostly expatriates that visit the site by shared bus. The members love sailing and for that reason the club only owns sailing yachts and no motor yachts.

The figure on the next page shows the three most important target groups in The Netherlands and their preferences regarding: facilities, mode of transportation, motor yacht or sail yacht and their preferred location of the marina.

	Range of services / facilities	Facilities	Parking lot/public transport	Motor boat/sailing yacht	Location
<i>Dutch regatta sailors</i>	Wide	Technical advanced	Parking lot	100% sailing yachts	Natural
<i>Dutch 'relax sailors'</i>	Wide	Basic	Parking lot	Small motor- and sailing yachts	Natural
<i>Dutch 'social sailors'</i>	Small	Basic	Parking lot	Small motor- and sailing yachts	Natural

Figure 39: Dutch target groups and the preferred marina profile (own source)

Regatta Center Medemblik is an example of a marina with facilities and services that regatta sailors appreciate. Marina Makkum offers a very good range of facilities for Dutch 'relax sailors' and especially families.



Chapter 10:

Conclusions and recommendations

10.1 Conclusions

Differences between the Dutch and Chinese situation

In The Netherlands, sailing is a traditional leisure activity. Many Dutch children learn how to sail. Some visit a sailing school and others learn the skills from their parents. Since sailing is no traditional form of leisure in China, hardly any Chinese know how to sail. The most striking difference between the Chinese and the Dutch situation is the great popularity of water sports in The Netherlands during a long history, which has never been the case in China. In China, the current yachting business is very limited and serves mainly the upper class Chinese, expatriates, tourists and companies. This is different from the situation in The Netherlands where yachting can be affordable for relatively low incomes. However, the Chinese middle class forms the largest potential market because of its massive size and rising average income. When different social classes enter the market, planners should remind that a significant part of the high class Chinese prefers an exclusive yacht club instead of a marina with facilities for both high class and middle class.

A second difference between the Chinese and Dutch situation that has effect on spatial planning of water sport facilities is the travel time customers accept. Chinese people accept a travel time of three hours from home to a water sport facility, while the average Dutchman does not want to drive longer than two hours.

Thirdly, the spatial planning system is different in both countries. In The Netherlands, a separated governmental body practices integrated spatial planning. In China, there are several governmental bodies dealing with spatial planning issues. Furthermore, land ownership is free in The Netherlands, while in China almost all land is government owned. Since there are not yet many marinas that proved their success in China, many governments do not appreciate separate marina projects. They prefer marinas being part of a greater project, especially real estate projects.

Lastly, The Netherlands has much more extensive sets of environmental legislation and legislation regarding water sports. The Chinese government is working on specific legislation for water sports and water sport facilities. All of the differences mentioned in this paragraph have significant impact on spatial planning.

Similarities between the Dutch and Chinese situation

Chinese as well as Dutchman prefer to spend their leisure in natural areas instead of urban areas. Although China does not have a long history of water sports, Chinese people have a positive attitude towards water.

Regatta centers

Criteria are differently weighed for regatta centers that for other types of marinas. The criterion 'location in the regional economy' is of less importance because a longer travel time is accepted. The criterion 'position in the waterway network' is of even greater importance since regatta sailors are more critical to sailing conditions: wind, water depth, current, etc.

Future outlook

However, the Chinese middle class forms the largest potential market because of its massive size and rising average income. Some specialists in the field expect that the Chinese middle-class will be ready for yachting within five years. Others estimate that it will take about fifteen years from now. Motor boating will take off first, as it is easier to drive a powerboat than a sail yacht. However, there is a

potential for sailing as well. Promotion and training of the general public are keys to development of this tourist industry.

As discussed in the first chapter, the main question of this research is:

What are the socio-economic criteria for the spatial planning of water sport facilities in China?

After all it turned out that the criteria developed for spatial planning of water sport facilities in The Netherlands are also applicable in China. However, there are different accents. The socio-economic criteria for the spatial planning of water sport facilities in China are:

- a. Location in the regional economy
- b. Regional economy structure
- c. Conflict with legislation, plans or current functions
- d. Accessibility over land
- e. Location in the waterway network
- f. Attractiveness of the landscape at the site or in the region
- g. Ratio between price and quality & services

a) Location in the regional economy

The water sport facility should be maximum three hours away from the target group. In China, the strategic place of a facility in the regional network of water sport facilities is not yet a hot issue but it will be important when the water sport industry is more developed.

b) Regional economy structure

It is recommended to choose a region where potential customers, operators and investors are present. If that is not possible, settle down in a region where these factors can be attracted. Enhance government support by generating positive spin-off and contribution to strengthen the regional economy.

c) Conflicts with legislation, plans or current functions

Planners should try to arrange land ownership, lease land or arrange commitment of the government to develop the project. The water sport facility should not conflict with other functions in the area. The selected site should not be adjacent to an industrial area for example. Planners have to make sure that the proposed plan does not conflict with legislation or current plans from the government.

d) Accessibility over land

In case the facility targets at high class Chinese or corporate visitors, the planner should take into account that the great majority of the visitors need a parking lot. Many of the middle class Chinese and foreigners do not own a car. They rely on public transportation. In that situation there has to be efficient public transportation that brings customers within three hours to the site.

e) Location in the waterway network

Firstly, a marina situated in a network of various water systems is preferable. In case several attractive water systems (such as lakes, rivers, sea, delta) can be reached from the marina, the area offers an interesting variety of sailing routes. The more water systems can be reached within one day, the more interesting is the location of the marina. Secondly, sailors appreciate to have interesting places to sail to in the area. Lastly, physical factors such as: average wind direction and force, sufficient water depth and sufficient sheltered places, determine whether the location in the waterway



network is attractive or not. The preferences of the target group should form the basis for the choice of the location. For example: some target groups prefer strong winds, others do not appreciate that.

f) Attractiveness of the landscape at the site or in the region

The ultimate goal of developing a water sport facility is to attract visitors to the site and make them stay as long as possible. In order to do so the site and the surroundings should be attractive. In general Chinese people prefer a site outside the urban area, with beautiful landscape.

g) Ratio between price and quality & services

In China the segmentation of the society deserves special attention. A part of the high class Chinese that chooses for luxury yacht clubs do not appreciate a mixed marina (with a public part and a private yacht club). This issue is of special interest since the Chinese society is getting more and more segmented.

While designing a water sport facility the designing team should keep the following figure in mind:

	Range of services / facilities	Facilities	Parking lot/public transport	Motor boat/ sailing yacht	Location
<i>High class Chinese</i>	Wide	Luxury	Parking lot	Large motor yacht	Natural or urban
<i>Middle class Chinese</i>	Wide	Basic	Public transport	Small motor boat	Natural
<i>Foreigners</i>	Small	Basic	Public transport	Sailing yacht	Natural
<i>Companies</i>	Wide	Luxury	Parking lot	Large motor yacht	Urban

Figure 38: Chinese target groups and the preferred marina profile (own source).

10.2 Reflection on concepts and approaches

Tourism planning

Tourism is a multidisciplinary field: it has geographic, economic, environmental, social and political dimensions. For that reason, the spatial planning of tourist facilities asks for an integrated planning approach (Gunn, 2002). The criteria listed in chapter 10.1 also include these dimensions. Although there is overlap, every criterion has a main dimension:

- Geographic: 'Location in the waterway network', 'Accessibility over land', and 'Attractiveness of the landscape at the site or in the region'.
- Economic: 'Location in the regional economy' and 'Regional economy structure'.
- Environmental: 'Conflict with legislation, plans or current functions'.
- Social: 'Ratio between price and quality & services' and 'Attractiveness of the landscape at the site or in the region'.
- Political: 'Conflict with legislation, plans or current functions'.

An integrated approach helps to achieve a situation in which is taken advantage of positive impacts and in which negative impacts are suppressed. Positive impacts can be exploited by choosing the most

suitable site for the new facility. Besides that enterprises can make more of their positive impacts in the regional economy by interrelating companies that can stimulate each other. By means of cooperation facilities and services can be shared, the appearance of the area can be improved, waste can be reduced, etc. Negative impacts of a project can be suppressed by means of legislation and control. In The Netherlands negative impacts of water sports are suppressed properly. Example are: closure of environmental sensitive areas, the existence of pump facilities to pump out bilge water and the water police that control the waters. In China there is hardly any specific legislation for pleasure crafts and water sport facilities.

Marketing, targeting and place promotion

From chapter 2.2 it became clear that the development of a water sport industry should start with market research. If there is enough demand from one or more market segments and the new to build facility will fit in the regional economy, the market can be entered (interview DHV, 2005b). The market consists of various target groups. Some have very good potential (primary market) others might have less potential or are promising for the future. In the market strategy is decided what groups will be targeted. In The Netherlands the main market for water sport facilities consists of middle class Dutchmen and middle class Germans. In China the current market focuses on high class Chinese, companies, foreign tourists and expatriates. According to the expectations of several interviewed persons, the Chinese middle class will be ready to enjoy yachting facilities within ten years.

The marketing technique describes how to make the customer purchase. Place promotion is a marketing technique. The place is very important in the marina business. The surroundings of a marina can make the place very attractive and successful. Nice scenery adds value to the 'product' marina. According to Gunn, the ultimate aim is to attract people to the facility, make them stay as long as possible and make them consume as much as possible. Ashworth and Voogd pointed out that it is essential to consider how people with a choice between several competing alternatives might trade off the various characteristics against each other. This question should be the basis for the promotion plan. Not only the existing alternatives in the network of water sport facilities have to be considered, possibly new alternatives as well. Promotion of water sport facilities in China is further discussed in the next paragraph.

10.3 Recommendations

Plans, legislation and control

It is recommended to develop regional tourism plans in which all tourist activities of the region are included. Furthermore, the advice is to do feasibility studies to find out whether water sports would fit in the region and whether the water sport facility can join in with a greater development project.

In China the development of specific legislation regarding water sport facilities and yachts is in an early stage. This means there are opportunities to include knowledge about potential negative impacts. All negative impacts; economic, socio-cultural as well as negative environmental impacts should be a starting point for the design of legislation and control of water sport activities. On the other hand positive impacts of water-based tourism can be stimulated by means of legislation. In order to keep water sport areas attractive and safe the water police should control the waters regularly.

Social change

During the planning process demographic factors need to be considered. Demographic change and other trends in the society have impact on the behaviour of recreational boaters. Changes in household size, number of elderly and amount of leisure time are examples of trends in the society that influence recreational behaviour. The Chinese society is changing rapidly and many of those



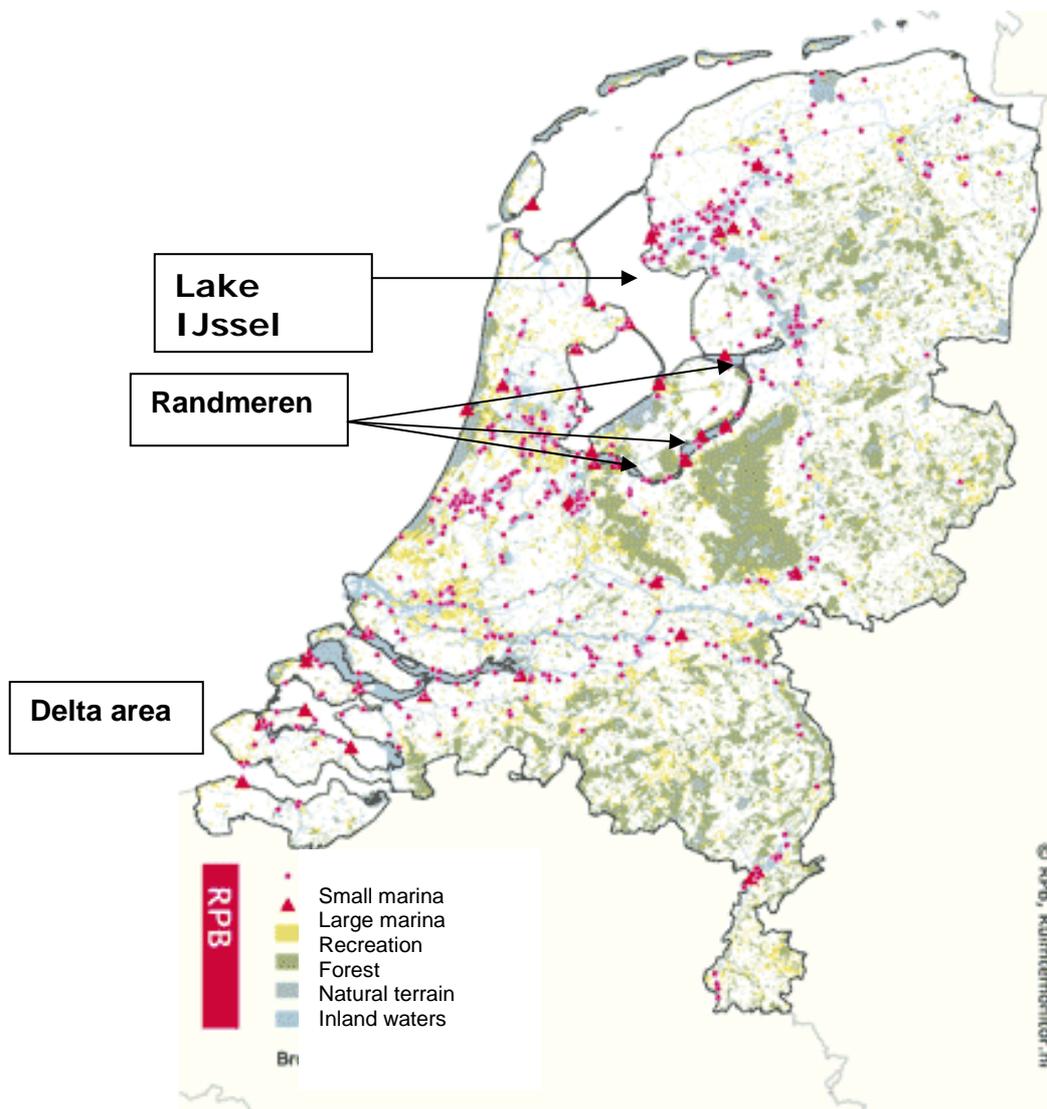
changes have a positive effect on the development of water sport. Since the average income is rising, more people can afford taking part in water sports. The middle class is growing and that means that a massive target group is getting ready to join the water sport lifestyle. Furthermore, Westernisation and modernization make people more interested in Western kinds of leisure such as water sport.

Promotion

Promotion and visibility of water sport facilities in the landscape are very important because it turned out that water sports are very unknown among the Chinese population. From the questionnaire (chapter 7) it turned out that many people, who could actually afford taking part in water sports, think it is only something for the high class. Promotion is recommended because it makes people more aware of the possibilities for different social classes. The middle class and future-middle class are interesting target groups for promotion because their income is growing rapidly and they form a massive market. Furthermore, it is recommended to build a water sport facility on a clearly visible place, because it makes people more aware of the existence of that form of recreation and they learn where to find the facilities.

Appendix 1:

Location of marinas in The Netherlands





Appendix 2:

Price list 'Suzhou Taihu Mercury Club & Marina'

Membership fee:

Corporate member (three nominees):	\$ 40,880	lifelong
Corporate member (one nominee):	\$ 17,880	lifelong
Individual member:	\$ 16,500	lifelong
Short term member:	\$ 3,000	for one year
Short term member:	\$ 4,880	for two years

Prices in US Dollars for members and non-members:

	<i>price for members</i>	<i>Price for non-members</i>
<i>Private boat slip rental</i>	\$ 1500 – 1800 per year (depending on the size)	members only
<i>Renting a Bayliner cruising yacht</i>	\$ 21 per hour	\$ 90 per hour
<i>Renting a Bayliner water skiing yacht</i>	\$ 24 per hour	\$ 95 per hour
<i>Renting a pontoon boat</i>	\$ 18 per hour	\$ 80 per hour
<i>Renting a children's boat</i>	\$ 10 per hour	members only
<i>Renting a houseboat with accommodation</i>	\$ 80 – 120 per night (depending on the size)	\$ 160 – 200 per night (depending on the size)

(Source: interview Browne, 2005)

Appendix 3:

Regulation regarding pleasure crafts in The Netherlands

There is an extensive set of right-of-way rules. Furthermore, there is general regulation (described below) and specific regulation for many large open waters and rivers. For small waters, small rivers and canals the 'police regulation for inland waterways' (Binnenvaartpolitieereglement) is valid. Skippers should have the regulation in question on board except for small open boats (KLPD, 2005).

Speed

In general it is forbidden to sail faster than 20 kilometers per hour. Authorities in charge can assign waters where it is allowed to go faster or where the maximum allowed speed is lower. There are special parts of waters assigned where speedboats and water scooters are allowed to sail faster than 20 kilometers per hour. Every captain should prevent causing danger by waves or the pull of the water (KLPD, 2005). The reasons for setting speed limits are safety, protection of riverbanks and preventing hindrance due to waves. It is hard to enforce speed limits in an extensive waterway network like in The Netherlands. Education about the consequences of exceeding speed limits should keep recreational boaters from going to fast (SRN, 2000).

Water-skiing & kite surfing

In principle, water-skiing and kite surfing are forbidden. The authority in charge can assign waters or parts of waters where it is not prohibited. In the case of water-skiing a second person (age over 15 years) should be on board to look out (KLPD, 2005).

Registration fast motorboats

Registration is required for fast motorboats. A fast motorboat is a ship shorter than 20 meters that can reach a speed of over 20 kilometers per hour. Jet ski's, water scooters and similar crafts fall in the same category as fast motorboats. A fast motorboat must to be registered in name of the owner (KLPD, 2005).

Distinguishing mark for pleasure craft

Large ships should have the name painted on both sides and motorboats must have the name visible from behind as well. The homeport must be on both sides or at the back.

Small ships should have the name of the ship painted on the outside and the place of residence on a clearly visible place. This regulation is not valid for rowboats and sailboats with a length of seven meters or shorter (KLPD, 2005).

Licence

On Dutch waters a licence is required for ships with a length over fifteen meters and ships that can sail faster than 20 kilometers per hour (KLPD, 2005).



Appendix 4:

List of interviews

Interviews in The Netherlands:

Ashworth (2005), professor at the Faculty of Spatial Science, University of Groningen, various interviews between January and August 2005.

Boer, F. de (2005), Mr. F. de Boer employee at Marina Makkum. Interview at February 3, 2005.

DHV (2005a), Mr. Michiel de Jong, senior consultant, unit: Ports, Waterways and Coastal development within DHV Consultancy and Engineering, Amersfoort. Several interviews between January and August 2005.

DHV (2005b), Mr. Pierre Sommer, director business development, unit: Investment Services within DHV Consultancy and Engineering, Amersfoort. Interview on 25th of February 2005.

DHV (2005c), Mr. M. ter Steege, unit: Environment and Sustainability within DHV Environment & Transportation. Interview on February 18, 2005.

Dominicus (2005), Mr. R. Dominicus manager of Regatta Center Medemblik. Interview on February 11, 2005.

Eringa (2005), Mrs. S. Eringa from the department of Housing, Spatial Planning and the Environment from the municipal government of Wûnseradiel. Interview on February 16, 2005.

Hanenberg, (2005), Mr. B. Hanenberg, port warden at Regatta center Medemblik. Interview on February 4, 2005.

Holters (2005), Mr. Holters, project manager "Agenda recreatie en toerisme 2004 – 2007, Bruggen naar buiten", from the Province of North-Holland. Interview on February 4, 2005.

KNWV (2005), Mr. F. Jibben, secretary of the Royal Netherlands Yachting Union (Koninklijk Nederlands Water sport Verbond, KNWV). Interview on March 24, 2005.

Verbij (2005), Mr. Verbij, manager of Marina Wolderwijd in Zeewolde. Interview at February 4, 2005.

WA Yachting Consultants (2005), Mr. R. Steensma, director of WA Yachting Consultants (Waterrecreatie Advies), Lelystad, The Netherlands. Various interviews and written correspondence between January and August 2005.

Interviews in China:

1. Mr. XU Yongchun, General manager of Investment Department of Hangzhou Able Industrial Group Co. Ltd.
Date: May 12
Time: 16.00 pm.
Place: Hangzhou

2. Mr. PU Lijie, Ph.D, professor in Physical Geography, department of Geography, Nanjing University in Nanjing.
Mr. Wu Xiaogen, Ph.D, professor in Tourism, department of Geography, Nanjing University in Nanjing.
Date: April 25 2005
Time: 9 – 12 a.m.
Place: Nanjing

3. Mrs. SUN Zhongxin, Ph.D, associate professor, Department of Sociology at Fudan University in Shanghai. Researcher at the Nordic Center (Fudan University) and Center for Human Rights Studies (Fudan University). Deputy Secretary-General: Center for Gender Studies (Fudan University).
Mr. YU Hai, Ph.D, professor department of Sociology, School of Social Development and Public Policy at Fudan University in Shanghai. Researcher at the Nordic Center (Fudan University). Deputy director: Center for Community Development Studies, Shanghai.
Date: May 11 2005
Time: 11 am – 1.30 pm.
Place: Fudan University, Shanghai

4. Mr. DAI Guang Yue, director of the 'Development and planning committee of Fengxian district'.
Mrs. MA Mei, associate professor in Tourism Planning at Fudan University in Shanghai, Doctor in Applied Economics and Master in Urban Planning.
Date: May 23, 2005
Time: 2 – 3.30 pm.
Place: Fudan University, Shanghai.

5. Mr. ZHU Rong is a graduate in Planning and he works for Huangpu Riverbank Development Commanding Office. At the same time he is PhD student at the Academy of Urban Strategy and Management and he works in the Shanghai Tongji Urban Planning and Design Institute.
Date: May 9, 2005
Time: 6 – 19.20 pm.
Place: Tongji University, Shanghai.

6. Mr. Michael Browne, general manager of 'Suzhou Taihu Mercury Club & Marina' in Suzhou.
Date: May 21, 2005
Time: 12.00 – 15.00
Place: Suzhou Taihu Mercury Club & Marina at Lake Tai, Suzhou.

7. Mr. Hans van der Laarse, sailing secretary of the 'Shanghai Boat and Yacht Club' in Shanghai.
Date: May 29, 2005
Time: 10 am. – 2.30 pm.
Place: Shanghai Boat and Yacht Club at Dianshan Lake, Shanghai.
Date: July 20, 2005
Time: 9.30 – 11.30 am.
Place: DHV office Amersfoort



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Appendix 7: Questionnaire held at the Shanghai Boat Show

The Holland Yachting & Marina Development Group

We like to know YOUR OPINION

This questionnaire takes only **1 minute** of your time. We appreciate your help!

1. Are you:

- Individual visitor
- Corporate visitor
- Government official visitor
- Other:

Are you:

- Chinese
- Foreigner

Your:

Age:
Occupation:

2. Why do you visit the Shanghai Boat Show?

- Personal interest in yachting
- Buying a yacht/equipment
- Selling yachts/equipment
- Interested in yachting development projects

3. What is your favourite activity to spend free time?

(several answers possible)

- Dining with relatives/friends/colleagues
- Enjoying nature
- Making a trip by car
- Making a boat-trip/yachting
- Water sports (swimming, jet ski, windsurfing)
- Shopping
- Sports
- Visiting family/friends
- Other:

4. How much free time do you have per month? (average)

- 1 – 3 days
- 4 – 8 days
- More than 8 days
- I'm retired

5. What makes yachting interesting for you? (several answers possible)

- I love steering a motorboat
- Driving a motorboat makes me feel powerful
- I love sailing
- I like to invite friends on a yacht
- I love to escape the crowded city
- I like to show off my wealth
- Doing business on board
- I'm not interested in yachting
- Other:

6. What is negative about yachting?

- It is dangerous because I cannot swim
- I don't like to be sunburnt
- It is expensive
- It is boring

7. How much are you willing to spend on renting a yacht for one day?

- Renting a nice boat: RMB
- Additional expenses that day: RMB

8. What is the maximum travel distance you accept for:

- Half a day of yachting: kilometres
- Full day of yachting: kilometres
- Two days of yachting: kilometres

Thank you for your time!

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