



Feasibility study of development of marine based industries in the Watchet locality

Draft Final Report

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1 Summary and Conclusions

1.1 Summary

The leisure boating industry has increased in popularity during the last three decades. In 2004 the total revenue generated from the leisure marine industry in the UK equalled £1,994 million - an increase of 55% in the last seven years. It is a high growth robust sector.

A significant number of the jobs it creates are in the services required to support boats and their owners, and not just to moor them. The types of services that might be attracted to Watchet represent over a quarter of the total revenue from marine leisure nationally.

The latest available information gathered in 2003 showed that there was a UK waiting list for 10,118 moorings, which represented 7% of the moorings available at that time. The only mooring spaces that are currently available are either in unfavourable locations or provide poor facilities.

The southwest region represents 20.5% of the total UK leisure marine industry revenue, although this is skewed by the presence of two of the UK's largest boat builders.

Watchet is relatively weak in economic terms, and local public sector policy seeks economic diversification and new sustainable jobs in growth sectors.

In the context of this regional and local policy environment, with its particular geographical focus on Watchet, [the marine leisure sector presents an excellent opportunity for development](#) if Watchet can offer what is required.

Watchet is based in a challenging location compared to the south coast:

- ❖ There is a relatively poor road network.
- ❖ Watchet is relatively isolated, thus marine business cannot easily benefit from a wide catchment.
- ❖ The marina's current capacity to hold 250 boats is regarded by commercial marina operators as the minimum level to provide a return on investment.

However, Watchet also has positive attributes that will help to create a popular boating centre if the correct building blocks are put into place:

- ❖ Watchet is located in a beautiful area and the coastal town has the fundamentals in place to evolve into a very attractive location.
- ❖ Successful marinas are facility led, and it has been proven on many occasions that latent demand will be unlocked once the correct environment and facilities have been created.
- ❖ Watchet is an excellent area to visit by boat.

Watchet has an opportunity to maximise the revenue and employment benefits from the marine industry. The marine industry itself will provide revenue and diversification of sustainable employment in a location where policy specifically aims to achieve this. A town of the character of Watchet will obtain very significant secondary benefits in restaurants and retail etc.

The following actions will maximise the benefits and ensure success:

- ❖ Current facilities for boat owner's personal needs are basic. These should be upgraded to be consistent with the aspirational life style that boaters seek. Security should also be improved.
- ❖ Adequate car parking is required. Failure to offer this will prevent the long term success of the marina. This issue needs a satisfactory solution.
- ❖ Current boatyard facilities are basic, and do not allow boat owners to adequately maintain boats, or improve them. These should be developed to provide a professional atmosphere that inspires confidence, and delivers the required marine engineering, boat repair, rigging, electronics, and chandlery services.
- ❖ Maximise the potential number of boats that visit and are parked at Watchet. These will contribute to the critical mass required to sustain additional marine related business such as boat sales, boat hire, training etc. Ideally in the longer term a new lock gate would be located on the outer wall entrance to provide for 400 to 450 boats. This would have a significant impact on creating sustainable employment. In the short term, the drying harbour should be used to support the marina as practicable.
- ❖ Regenerate the town and esplanade to make visiting, retailing, eating and drinking a pleasurable experience. Watchet could easily become the "Padstow of Somerset".

There is pressure for residential development of the harbour to achieve financial capital receipts and future revenue. This could lead to compatibility issues in general, as well as stifle development of the marine industry. However, sympathetic development presents an opportunity for reinvestment.

It is vital that provision for the future of the marine industry is made now, while there is still time to prevent it being choked by immediate decisions regarding planning and development of the harbour. To be specific, policy should be consistent with:

- ❖ Permitting facilities for boat owners' personal needs to be upgraded.
- ❖ Providing adequate car parking.
- ❖ Developing boat storage and boatyard facilities.
- ❖ Developing marine related business in the supply chain.
- ❖ Providing for expansion of the number of berths (afloat, drying, ashore).
- ❖ Avoid future compatibility issues with the marine industry.

1.2 Summary Recommendations

The future of the marina, its facilities and its immediate surroundings could become a magnet to attract new berth holders, a higher number of visiting boaters, and tourists from its surrounding areas.

The harbour also has to respect and cater for Watchet's long-standing local boat owners (WBOA) by providing cost effective moorings and facilities to encourage the younger generation to enjoy the sea and learn seafaring skills.

Boat owners & tourists will only keep their boats in Watchet, visit in higher numbers and spend their disposable incomes, if the area provides an enjoyable overall experience, and if the services are available to support their needs. The following has to be achieved to foster sustainable success:

Action 1: Provide essential personal facilities

Provide and upgrade the following essential personal facilities for the boat owner to allow the marina to reach full capacity:

- ❖ In accordance with the Yacht Harbour Association (YHA) recommendations for a marina the size of Watchet, a minimum of 200 secure car parking spaces with easy access to unload equipment.
- ❖ Provide WC's & Showers in accordance with the YHA with a specification of high quality decoration & fittings.
- ❖ Provide waste disposal and environmental practices in accordance with the YHA.
- ❖ The physical site must be architecturally attractive & clean.

Income derived from berth holders, services and site rental must provide a return on investment able to support reinvestment in maintaining facilities, and meeting forthcoming environmental regulations.

Action 2: Provide essential boatyard services

Provide the following essential boatyard services to support the marina:

- ❖ Engine / outboard servicing / new sales.
- ❖ Electrical equipment servicing / new sales.
- ❖ Boat repairs, maintenance, painting & rigging.
- ❖ A crane / hoist with additional capacity of up to 35 tonnes to allow larger boats to be lifted out of the water and serviced.
- ❖ Chandlery.
- ❖ Out of the water winter storage.

The number of boats that are berthed and operate out of the marina must be maximised, in order to provide critical demand needed for such services to survive and prosper.

Action 3: Facilitate development of value added services

Provide the opportunity for further marine related businesses to be sited at East Quay, which will further support and enhance the site:

- ❖ New & used boat sales, boat finance & insurance.
- ❖ RYA Training Charter / Boat Hire.
- ❖ Additional Sea Angling Boat Trips.

The potential businesses above will require the marina to be operating at full capacity, and have to rely on gaining a customer base outside of the local marina to become sustainable.

Action 4: Create additional mooring capacity

Provide opportunities to develop critical mass of boats:

- ❖ Create low cost mud berths at West Quay to provide economic berths as an alternative to using the marina on the full tariff. This will provide additional chargeable marina space in the future at the full rate.
- ❖ Maximise the number of berths in the marina, and optimise the berth mix to maximise revenue.
- ❖ Once the marina reaches full capacity implement an under cover boat rack system for powerboats and ribs up to 9m length.

Action 5: Enhance the wider appeal of the town

Ensure that Watchet provides an attractive offer:

- ❖ Good eating & drinking opportunities.
- ❖ Interesting retailing opportunities.
- ❖ An attractive Esplanade with points of interest, opportunities to walk along the harbour wall & be invigorated by the sea views & take the sea air.
- ❖ The opportunity to feel a part of the marina environment whilst respecting the privacy of private boat owners and allowing the boatyard to operate.

If Watchet does not provide an attractive proposition for boat owners to enjoy their leisure time in the marina, it will not reach its full potential.

1.3 Summary Outcomes

We estimate that DIRECT potential marine related employment would be:

- ❖ Full time jobs: 22 to 24
- ❖ Part time / seasonal jobs: 11

The businesses generating this employment would be based primarily on the East Quay, but also at the Paper Mill site.

In addition, there would be considerable indirect and induced economic impacts from the marine industry. It may be beneficial to extend this work into an **economic** impact study. This would quantify the real longer term impact on the local economy.

A summary of the space requirements for businesses is shown in Table 1.1:

1.1: Approximate Space Requirements for East Quay	
	Approx. Footprint
Marina Office.	3.5 x 3.5m
Washing, WC's & Laundry	10 WC's, 3 Urinals, 8 Basins, 6 Showers, 2 Deep Sinks, Washing Machine & Dryer
Car Park	200 Spaces
If Valet Service with 150 spaces at Paper Mill:	50 Spaces
Marine Engineering, Electrical Engineering,	10 x 10m
Rib & Small Motor Boat Sales	10 x 10m
Boatyard Repairs, Refits, Shipwrights, Rigging, Antifouling.	12 x 23m
Dry Stacking Boats	20 x 6 m
Chandlery (Equipment / Clothes) & Cafe	8 x 8m
Brokerage, Marine Finance, Insurance, Holidays	3.5 x 3.5m
RYA Training, Boat Charter	Selling Station
RYA Courses, Charter & Boat Hire	Selling Station
Professional Sea Anglers	Selling Station

2 Introduction

Somerset County Council (SCC) has appointed Fisher Associates to undertake a review of the feasibility of developing units for a cluster of marine based businesses in the Watchet marina locality,

This study takes place in the context of a wider regeneration strategy, and specific proposals for development of the marina:

- ❖ SCC and partners are developing market town labour market strategies, designed to improve skill levels, employment opportunities and future competitiveness. Watchet / Williton is a beneficiary of this initiative, and the marine leisure industry has been identified as offering potential for economic diversification.
- ❖ Watchet Harbour Marina was opened in 2001 and can accommodate more than 140 boats with proposals for expansion. There are also proposals for significant property development of the East Quay. A diagram of the marina is shown overleaf.

The study hypothesises that there is an opportunity to develop accommodation for a cluster of marine based support businesses in the marina locality. It provides research into the requirements for these, and develops recommendations for business units that may catalyse growth in the supply chain and related employment.

The key tasks undertaken were to:

- ❖ Ascertain the level of demand for marine support businesses.
- ❖ Appraise the suitability of potential sites.
- ❖ Test the proposed support business offer in order to ascertain/verify that this would match demand.

The key recommendations on potential marine based industry cluster development include the number and types of businesses, and their space and structure requirements.

We are grateful for the assistance of Watchet Harbour Marina and its customers, and SCC and its partners in the development of this report.

3 Watchet: The Marina in Context

3.1 Local Issues and Context

Watchet is a historic maritime town located in Somerset. In general, Somerset has a small town and rural economy including a number of market towns where manufacturing employment is disproportionately important to the local economy. Policy aims to improve skill levels, employment opportunities and the future competitiveness of these local economies.

West Somerset District Council and partners have drafted a [Strategy for Enterprise and Economic Growth in West Somerset](#). The strategic aim is:

“To encourage economic growth, increase permanent jobs and raise average wage levels by the provision of a co-ordinated range of networked employment premises and support mechanisms that will stimulate demand and meet business need.”

The objectives of the strategy are:

- ❖ To create a mix of networked workspace provision across West Somerset.
- ❖ To stimulate demand and offer business support through a hub and spoke approach.
- ❖ To achieve added value by linking and achieving synergy with other related developments.

Another key policy vehicle is the [Somerset Market Towns Employment Project](#), which focuses on the six market towns – Bridgwater, Chard, Shepton Mallet, Watchet / Williton, Wellington and Yeovil. In summary, this aims to develop strategies for diversifying and developing the local labour market.

A baseline analysis concluded that Watchet / Williton ranked in the top two in terms of immediacy for intervention, and made the following findings:

- ❖ Watchet / Williton are perceived to be remote places where the economy is weak, prospects for business, including tourism on which the economy is heavily dependent, are declining, the local authority is lacking in resources and there is a dearth of inward investment.
- ❖ Opportunities for growth and development are limited to a small number of niche businesses, which find it hard to recruit new employees especially in the higher skilled technical areas. There is a shortage of land and premises but rents are low and there is little incentive to invest.
- ❖ The labour market is weak, with relatively low percentages of jobs in potential growth sectors; very poor representation in knowledge-based industries; a relatively high proportion of jobs in declining sectors.

- ❖ No business employing over 200 people, and half of the businesses employing 50 + people are in declining sectors. Watchet is heavily dependent on the paper mill. Seasonal unemployment is a pressing issue. Relatively high levels of older (i.e. aged 50+) people are unemployed.
- ❖ There are considerable pockets of social exclusion, with some wards placed in the worst 25% in the country.

3.2 Watchet Harbour Marina

Watchet is located on the Bristol Channel coast, and it has a strong commercial coastal trading history. Currently the harbour is in the process of change from it's industrial past towards a leisure marine orientated future. The Cruise ship Balmoral also visits 2-3 times a year.

The Bristol Channel has strong currents & large tides, which limit the access into the marina by 2.5 hours, either side of high tide via its lock gates.

Watchet is a popular cruising destination for visiting boaters from South Wales, Bristol, and Birmingham (via inland waterways). Up to 40 private boats typically visit over a summer weekend and 70-80 during bank holidays.

The marina at this time has 180 permanent pontoon berths, 40 of which are currently used by the Watchet Boat Owners' Association (WBOA) on beneficial terms.

The new marina pontoons and fitments are in good order. Basic car parking is currently provided on East Quay. There is also an agreement to provide designated marina parking spaces in Harbour Road via Watchet Harbour Marina's lease with West Somerset District Council. The boatyard facilities comprise a crane for lifting boats out of the water with a restricted capacity that damages the tarmac surface, basic showers & WC's, a virtually unused large industrial shed, and a start-up chandlery squeezed into the marina office. A number of independent operators work from vans providing services to boat owners such as boat & engine repairs.

The Marina also provides a venue for 2 or 3 commercial sea angling boats, and a number of small emerging businesses such as RYA Training, Charter and Corporate Entertainment. The local sea scouts are provided space near the public slipway and are housed in a portacabin / container.

The surrounding East Quay area & Esplanade currently provides a visual reminder of the commercial ports history, with little beneficial use at the moment. In general terms, inadequate facilities and the aesthetics of the location are not conducive to realising latent demand.

Key facilities on site are summarised overleaf. A diagram of the marina follows this.

Summary of Facilities

Watchet Harbour Marina:

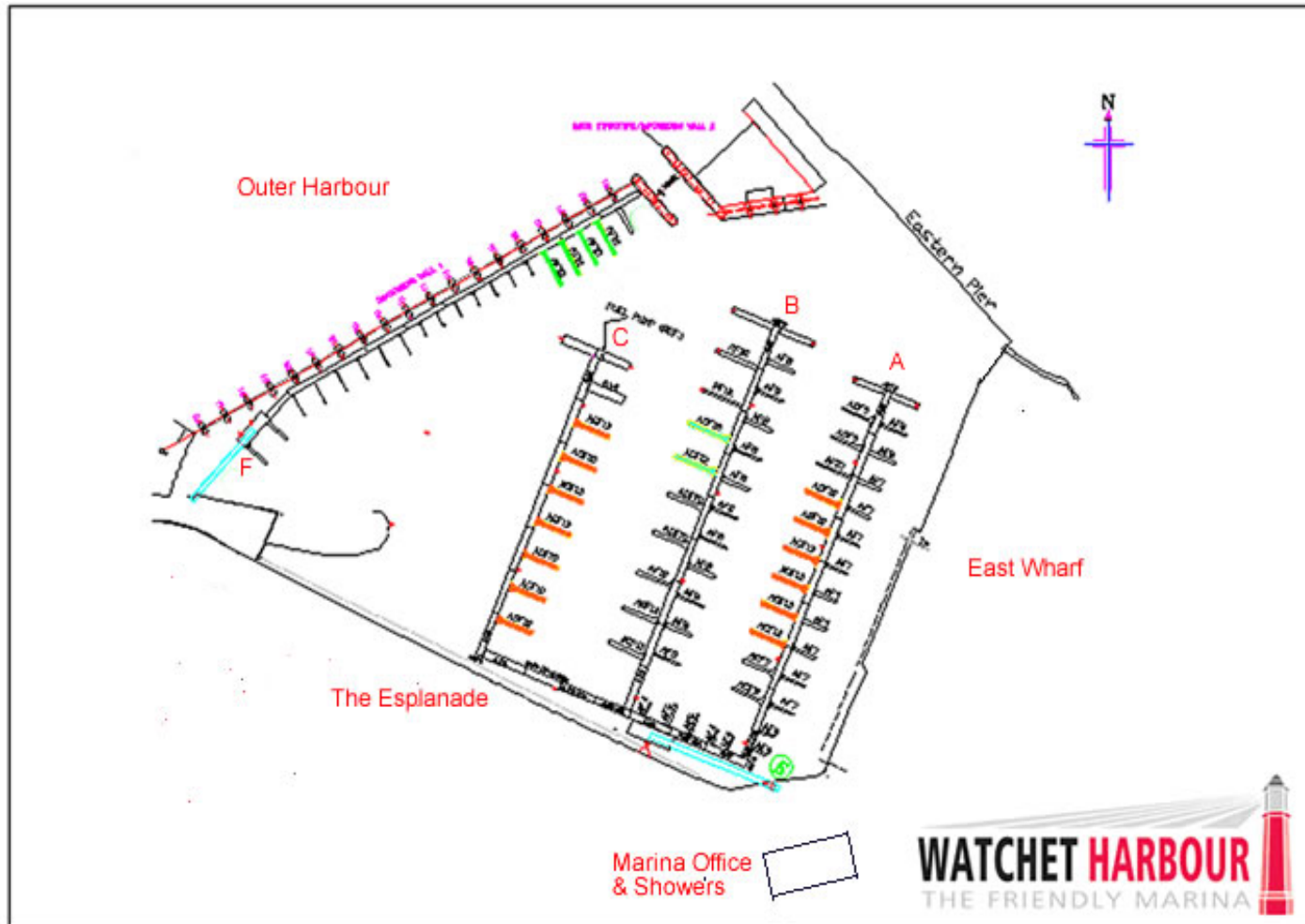
- ❖ 180 berth Marina.
- ❖ 2 x Male and Female Showers.
- ❖ 2 x Male and Female Toilet Facilities. (Up to 60 to 100 ladies on site at a busy weekend).
- ❖ Fuelling pontoon (Diesel).
- ❖ Laundry facility.
- ❖ Slipway and trailer parking.
- ❖ Boat lifting facility – 15 tonnes.
- ❖ Boat hard standing area.
- ❖ Boat storage (open and undercover)
- ❖ Boat Brokerage via notice board.
- ❖ Chandlery (Just opened – limited space).
- ❖ Basic Car Parking.
- ❖ Local village facilities.

Watchet Boat Owners Yard:

- ❖ Owned by a Trust.
- ❖ Charitable / self help organisation.
- ❖ Rate relief status.
- ❖ Free berthing on marina for a 5 year period which is coming to an end.
- ❖ 4 ton boat lift.

Sea Scout Site:

- ❖ Located in a portacabin / container near the public slipway:
- ❖ Use sailing dinghies, canoes, rowing gigs & a rib used as a safety boat.
- ❖ 120 visiting sea cadets.
- ❖ Slipway is 100 meters short preventing greater tidal access.
- ❖ Allowed access inside marina with canoes (discussing allowing slanted pontoons to make easier entry).



4 The Marine Leisure Industry

This section provides a description of the industry, and is based on a literature review placing the project in national, regional and local context. Information has been sourced primarily from the DTI Marine Unit, British Marine Federation (BMF), Royal Yachting Association (RYA), Coastal Development Plan, Yacht Harbour Association (YHA) and Marine South West (MSW).

4.1 Overview

The British leisure marine industry is a distinct group of over four thousand firms and sole traders that provide specialist products and services to marine leisure users across the world. These include: new leisure craft, second hand boats, engines, insurance, finance, mooring, berthing and storage, boatyard services and repair, chandlery, waterways holidays, sailing holidays, boating equipment, marine electronics, deck hardware, clothing, safety equipment, sailing schools, corporate events, watersports kit etc.

The recreational boating sector makes an important contribution to the national economy. In many areas, it is a significant element in the local economy as well as providing social and cultural opportunities for the local population. Participation surveys carried out by the BMF and RYA show that 7% of the UK population participate in some form of boating. This equates to over three million people.

The rest of this section describes some of the key components and issues defining the industry.

Location: The major coastal concentrations of boating activity include:

- ❖ North Norfolk Coast
- ❖ East Coast Estuaries
- ❖ Solent Estuaries and the Isle of Wight
- ❖ Sheltered harbours such as Weymouth, Portland, Poole, Chichester and Torbay
- ❖ South Devon & Cornwall
- ❖ South West Coast of Scotland

Moorings Provision: Provision for moorings is essential to the health of the marine industry. BMF statistics show that £115 million is directly generated by moorings, berthing and storage each year. With indirect spend in shops, restaurants and elsewhere ashore multiplying this contribution.

Onshore Facilities: Most people arriving to take part in boating facilities arrive by car because of the quantity of equipment that is needed. Parking for cars and their trailers are vital for local & visiting trailer craft. This leads to the demand for car parking and the usual visitor requirements such as toilets and waste disposal.

Clubs and Teaching Centres: A network of clubs and teaching facilities is important for the growth of the sport. The RYA's facilities strategy aims to encourage and guide to further enhance accessibility to the sport.

The facilities required by clubs and teaching centres go beyond the centre buildings themselves. They also need ancillary facilities such as dinghy storage, car parking, rigging areas, slipways and pontoons.

Tourism and the Role of Boating: In recreational boating, there is considerable overlap between sport, recreation and tourism. The boating industry in many ways is a key component in tourism, which underpins the economy of many waterside communities. The benefits to the local economy can be measured in terms of indirect local employment and the amount of spending derived from boating participants to local businesses and services. British Waterways estimates that every year the inland waterways bring Britain over £1.5billion in visitor income supporting 55,000 jobs.

Tourism is not confined to the home market. A study carried out in a marina in Chichester harbour showed that 10% of visiting yachtsmen were from overseas. The south and east coasts, as well as the west coast of Scotland receive a significant number of overseas yachts.

A report published by Tourism South East revealed that some 70,000 yachtsmen visited harbours and marinas in the region. These visitors spent a total of around £28 million during their visits on a range of goods and services from fuel to dining out in local pubs and restaurants. The majority (91%) visited in privately owned boats and 83% were domestic visitors, predominantly resident in the southeast.

Marinas and Boatyards: Two of the most important marine businesses requiring waterside sites are marinas and boatyards. Although each has a distinct function it is often blurred in practice as both facilities are often on the same site.

Many sites have been lost to development that does not need a waterside site. Development of coastal sites in particular for housing is increasing and is an attractive option for the developer. This short-term gain is a long-term loss to those activities that need a coastal site, and hence to the quality of life and economy of the area.

Government planning guidance states that coastal sites should be safeguarded for activities that require a coastal location. Marine businesses often compliment other types of development such as housing and retail. Care must be taken, however, when allowing new housing close to marine

businesses. By their very nature they are light industrial concerns, and problems have arisen where residents complain about existing boatyards and this can cause them operational difficulties and in severe cases drive them out of business.

Boatyards and boat storage are generally quiet uses but each case is different. Some yards generate noise, which may cause annoyance to residents. The BMF and RYA have experience of complaints being made to operators and to Authorities including:

- ❖ Halyards slapping on metal masts in windy conditions.
- ❖ Engine noise from straddle carriers and cranes.
- ❖ Sandblasting of steel hulls.
- ❖ High use of powerboats in confined areas.

Where boatyards or marinas are long established there is usually a tolerance between adjoining residents. New housing schemes, often high density and high value, and targeted at older residents, have caused problems for long established businesses. As more such schemes are planned, compatibility issues are likely to occur unless proper precautions are taken in design of the new development.

4.2 National Trends and Context

Participation in Boating: The leisure boating industry has increased in popularity during the last three decades. The following principle factors have been identified as likely causes:

- ❖ A growth in affluence of the general population.
- ❖ Increases in demand for a greater number and wider range of leisure and recreational activities including entry level.
- ❖ Increasing supply of facilities from new developments and regeneration schemes.
- ❖ Easier access to facilities.

Leisure Marine Industry Revenue: The figures in Table 4.1 show that the revenue generated from the leisure marine industry has increased by 55% in the last seven years. It is a growing market.

4.1: Total Leisure Marine Industry Revenue 1997 – 2004								
Year	1997	1998	1999	2000	2001	2002	2003	2004
£M	1,289	1,265	1,341	1,467	1,611	1,743	1,838	1,994
% inc		-1.8%	6.0%	9.4%	9.8%	8.2%	5.5%	8.5%
Source BMF January 2005								

Leisure Marine Industry Revenue By Sector: The figures in Table 4.2 show how the leisure marine industry is split by sector. It is interesting to note that manufacturing and distribution represent 70% of the total revenue. Mooring / Berthing / Storage and Boatyard Services / Repairs only represent 9% of the total revenue. The types of services that this study is about represent 33% of the total potential revenue in the overall industry.

4.2: Leisure Marine Sector Revenue	
	£ Millions
Boatbuilding	618.7
Wholesale Distribution	264.7
New Boat sales (Dealer sales)	236.8
Equipment (mnfr.)	206.9
Mooring / Berthing / Storage	110.0
Retail	95.9
Electronics (mnfr.)	82.9
Boatyard Services / Repairs	73.0
Coastal Charter	53.0
Brokerage (Second hand boat sales)	48.6
Inland Hire & Charter	45.6
Finance	41.2
Sea School	30.5
Power & Propulsion (mnfr.)	29.3
Professional Services	27.4
Insurance	16.8
Waterside electronics dealer	12.3
Total	1994
Source BMF January 2005	

Employment by Sector: Mooring / Berthing / Storage and Boatyard Services / Repairs only represent 12.2% of the total employment (Table 4.3). The services to be attracted to East Quay represent 28.1% of the total potential revenue. The proportions are reasonably in line with the income revenues.

4.3: Employment by sector, 2004				
	Permanent	Temporary	Total	
Boatbuilding	7,857	283	8,140	28.5%
Power & Propulsion (mnfr.)	402	9	411	1.4%
Electronics (mnfr.)	974	101	1,075	3.8%
Equipment (mnfr.)	4,574	169	4,743	16.6%
Inland Hire & Charter	1,173	691	1,864	6.5%
Wholesale Distribution	1,824	48	1,872	6.5%
Insurance	390	26	416	1.5%
Finance	85	1	86	0.3%
Professional Services	1,796	172	1,968	6.9%
Mooring / Berthing / Storage	1,726	298	2,024	7.1%
Boatyard Services / Repairs	1,307	160	1,467	5.1%
New Boat sales (Dealer sales)	896	62	958	3.3%
Brokerage (Second hand boat sales)	332	40	372	1.3%
Retail	1,044	126	1,170	4.1%
Coastal Charter	970	132	1,102	3.9%
Sea School	596	210	806	2.8%
Waterside electronics dealer	129	2	131	0.5%
Total	26,075	2,530	28,605	100.0%
Source BMF January 2005				

Structure and Size: Table 4.4 below shows the industry size and structure in 2004.

4.4: Industry size and structure, 2004							
	no. firms	%	workforce	%	revenue	%	£ / person
Self employed	1,210	30%	1,210	4%	£95M	5%	£79K
Small firms (2-4 people)	1,741	43%	4,152	15%	£222M	11%	£53K
Med size firms (5-9 people)	547	13%	3,016	11%	£215M	11%	£74K
Large firms (10-99 people)	526	13%	10,944	38%	£810M	40%	£74K
Very large firms (100+ people)	28	1%	9,283	32%	£652M	33%	£70K
	4,052	100%	28,605	100%	£1,994M	100%	£70K

Note: Workforce includes working directors, the self employed & part-time staff.

Source: BMF January 2005

The types of company that are expected to develop in Watchet are likely to be micro businesses and small firms. These represent 19% of the total workforce in the marine industry.

Mooring Demand: It is estimated that there are 150,000 moorings around the UK coast. The 2003 National Audit carried out by the BMF demonstrates that the demand for moorings exceeds the supply in coastal waters of the UK. The waiting list for moorings in 2003 was 10,118 berths (7% of currently available moorings). The 2003 waiting list comprises of 44% sail, 35% power & 21% unassigned boat types. Winter storage for existing berth holders also had a waiting list of 1,703.

With a 2.8% vacancy rate overall, it is clear that the supply of moorings is almost matched by the geographical demand in numeric terms. There may well be no slack at all at the present time if the vacancies are either in locations that are relatively unattractive, or offering mooring types for which there is little demand.

Constraints on mooring provision: There are significant constraints on generating further mooring capacity, and demand is effectively constrained. The key constraints on expansion are:

- ❖ Lack of space.
- ❖ Planning system.
- ❖ Broad environmental issues.
- ❖ Environmental designations i.e. SSSIs, AONBs, SACs.
- ❖ Dredging.
- ❖ Finance.

Mooring Types: Pontoon / marina type moorings are growing in importance in response to consumer demand. The proportion of swinging & fore / aft moorings in relation to pontoon moorings is decreasing.

4.3 Regional Role and Strategy

The Regional Economic Strategy: The Regional Economic Strategy (RES) for the South West of England has identified the marine sector as one of its established priority sectors.

The published vision for Marine South West (MSW) is that, “By 2010, the Marine Industry in the South West will be regarded as the most competitive, innovative and coherent in Europe”. To that end it has created and implemented a number of projects and initiatives aimed at developing the marine sector in the region by improving the competitiveness and stimulating the growth of sector SMEs.

Leisure Marine Industry revenue by RDA region: It can be seen in Table 4.5 below that the South West region is the second largest provider of revenue in the UK.

4.5: Leisure Marine Industry Revenue by RDA region, 2004		
	£ Millions	Sector revenue
South East	769.2	38.6%
South West	409.5	20.5%
East Anglia	304.2	15.3%
East Midlands	152.1	7.6%
West Midlands	109.0	5.5%
Scotland	47.5	2.4%
Other British Isles	65.7	3%
Wales	59.6	3.3%
North West	35.7	1.8%
Yorks & Humb	33.6	1.7%
North East	7.6	0.5%
Total	1,994	
Source: BMF January 2005		

Leisure Marine Revenue by Trading Activity: The Boatbuilding sector is disproportionately high in the South West region due to two of the three largest UK Powerboat builders (Sunseeker & Princess Yachts) being located in Plymouth & Poole (see Table 4.6).

4.6: Leisure Marine Revenue by Trading Activity in the South West		
	£ Millions	Sector revenue
Boatbuilding	253.4	61.9%
Power & Propulsion (mnfr.)	0.7	0.2%
Electronics (mnfr.)	2.6	0.6%
Equipment (mnfr.)	71.7	17.5%
Inland Hire & Charter	2.8	0.7%
Wholesale Distribution	15.3	3.8%
Insurance	2.6	0.6%
Finance	0.0	0.0%
Professional Services	3.0	0.7%
Mooring / Berthing / Storage	13.5	3.3%
Boatyard Services / Repairs	9.2	2.2%
New Boat sales (Dealer sales)	9.4	2.3%
Brokerage (Second hand boat sales)	4.1	1.0%
Retail	15.8	3.9%
Coastal Charter	0.9	0.2%
Sea School	2.0	0.5%
Waterside electronics dealer	2.4	0.6%
South West Total	409.4	

Mooring Demand: This area from Chepstow to Lands End only represented 2% the total number of surveyed moorings. There was a strong expectation for anticipated mooring demand over the next five years.

5 Potential for Marine Based Industries in Watchet

The industry review illustrates the general potential for growth in the dynamic marine leisure industry. The current plans in Watchet for expansion of berths, the potential for marine facilities ashore, illustrate how these opportunities are impacting locally.

This section now addresses the core purpose of the study. It reviews the key trends and lessons on best practice to be drawn from both the private and public sectors. It then assesses the type of services that the growing demand base needs based on a survey of boat users in Watchet, and based on the response of several companies regarding their interest in developing and upgrading services.

5.1 Current Trends and Best Practice

A number of interviews have been carried out with following leading marina development industry figures to gain direction:

- ❖ Sam Bourne, Chairman, The Yacht Harbour Association
- ❖ Tim Mason, Managing Director, Premier Marinas
- ❖ Mick Betterworth, Development Director, MDL
- ❖ Simon Haigh, Managing Director, Quay Marinas
- ❖ Capt Michael Brew, Director of Harbours, Isle of Man
- ❖ Andrew Courtness, Business Development Director, Jersey Harbours
- ❖ Terry Ponting, Managing Director, Whitehaven Development Corporation

Critical Sustainable Capacity

The larger commercial operators agreed that between 250 & 300 occupied berths are required to make a viable return on investment. It takes a similar number of staff to operate a 150 berth marina as a 600 berth site.

However, marinas owned by local government in less popular or under developed boating regions were prepared to subsidise facilities initially to encourage growth and employment, with the longer term aim to create financial viability.

One interviewee suggested that in the short term East Quay will have to be subsidised by local government, until the whole marine environment and town upgrades and it gets to the point that it can become financially self supporting.

Marina Berthing Requirements

Marinas are finding that the average boat size is 11m long but the demand is for more boats that are less than 8m or larger than 12m. Any possibility of spare capacity is mainly available for 10m boats.

Dry Stacking Boats on Land

Dry stacking boats on land is considered the future way to operate for motorboats up to 10m according to one interviewee. This system has the following benefits:

- ❖ Maximises boat storage capacity.
- ❖ Same rental price as a marina berth.
- ❖ Provides the following owner benefits:
 - ❖ No antifouling.
 - ❖ Fibreglass hull is kept out of water reducing the likelihood of obtaining osmosis problems.
 - ❖ Being undercover helps the boat's resale value.
- ❖ Minimises trailer storage.
- ❖ Less maintenance required compared to marina pontoons.

The coastline dries out to leave exposed rocks & so is not an ideal water sports area where people like to water ski and visit a beach. However big ribs are fast and seaworthy and could be taken to South Wales. This would be an excellent way to increase East Quays boat parking capacity beyond 250 boats once the marina has reached full capacity.

Marina Car Parking Facilities

Marina car parking facilities need to be convenient to drop off equipment to the boat. The car park needs to be secure for boat owners to feel comfortable leaving expensive cars behind. The YHA space recommendations were considered to be practical.

Showers and WC's

It was generally agreed that the YHA recommendations specifying marina facilities were a practical standard to follow. MDL commented that boat owners are becoming fussier about cleanliness and quality of fittings with regard to washroom & WC facilities. MDL clean washrooms / WC's 4 times per day at the weekend & 2 times per day during the week.

Yacht Clubs

Commercial operators view Yacht Clubs as providing a social meeting place for boat owners, but they die during the winter whereas a restaurant can attract customers from the local market throughout the year and have a better chance of survival. However, subsidised Yacht Clubs in areas such as the Isle of Man have proved successful, and are used for other purposes e.g. community meeting room; rented out for weddings and parties, business presentations. A 325 berth marina at Southsea failed to support a restaurant, which was focused on servicing berth holders only. New proprietors are looking to also serve the local market and tourists.

Boat Yard Services

Boat Services need to be on site by the water or at a boat yard next door. Watchet is a long way from neighbouring services, so it is important for East Quay to provide boat yard services in order to maximise the number of boats visiting and berthing at the site.

- ❖ Marine engineers & boat repair companies should be properly qualified and insured. A number of low overhead one-man band companies operating from vans will undercut each other. These companies do not usually reinvest in developing young staff. A franchise can be offered to rationalise competition, which will help to provide security for companies based at East Quay.
- ❖ It is advisable to have a single operator on site that is capable of offering a large number of services that provide a greater ability to cover overheads. However it is advised for companies to also seek external business opportunities such as insurance jobs. If the service and facilities become well regarded by boat owners they will attract customers from outside the marina.
- ❖ One interviewee stated that there was a lack of undercover repair facilities on the Bristol Channel, and this could be a facility that would attract visiting boats to Watchet for refits. However, Whitehaven Development Company felt that it was hard to recover costs from such an investment. It is likely that the company occupying the facility in a developing situation such as Watchet should be provided with a subsidised rent. Paint spraying and osmosis work could be attracted to the area by providing an undercover facility.
- ❖ A greater income potential is created by the 14m plus boat size – they create employment because the owners do not often engage in DIY. Conversely, DIY is often part of pleasure of ownership for boat owners with craft up to 11m. Big boats must be maintained to protect resale value.
- ❖ A boatlifting hoist with a 30 to 35 t capacity was generally felt suitable for Watchet Marina. A larger hoist could bring larger yachts to the area for servicing & repair work, but it was felt Watchet was lacking space to pursue this sort of operation.
- ❖ One interviewee advised that it is advisable to look into sourcing a static crane, which can turn 360 degrees and is relatively quiet to operate.

Chandleries

These find it hard to compete with internet retailers unless providing for distress sales. Clothing sales are very important to generate high margins and a fast stock turn. Boat clothing items also sell to non-boaters, providing a bigger customer base. The chandlery at Hythe Marina village with 444 berths has just gone bankrupt. Small marinas often have a basic chandlery service provided via job sharing with other services to create viability.

Target Markets

Large tides & strong currents make the Bristol Channel a challenging boating area. Restricted tidal access reduces the opportunities to get on to open water and the opportunity to return if the weather deteriorates. South coast boaters typically anchor at beaches & bays for day outings. Typical boats to be targeted for the Bristol Channel area would be larger motor yachts, larger ribs, mid sized cruising yachts and sea angling boats.

Taking care of the local boating community

One public sector interviewee stressed the importance to cater for the needs of the local boaters by providing an area of traditional cost effective basic facilities. Having obtained basic facilities, the local boating community are keen to see the local economy benefit from new boaters coming into the area.

Regeneration of Harbours

Isle of Man Harbours commented that the demise of the commercial harbours there had left 6.5 out of 7 harbours not used effectively. Once the correct environment and facilities for 67 boats was put into place it unlocked a latent demand for boat ownership, and the quality of the boats noticeably became higher. Now the Isle of Man has a waiting list for marina berths in place for its second phase of regeneration to provide berths for another 40 boats.

As a result of the marina the quality of the housing in the area is being upgraded, 300 apartments have been developed at the back of the marina & the old bus station is being developed into a hotel. A chandlery operates on the site, which also sells boating clothing to the general public. A boat repair service was started but proved unsustainable at this point in time due to the lack of boats. To date the site has created 6 specific marine related jobs, and the site has provided access to marine leisure activities for young people.

5.2 Demand for Services

We undertook a survey based on 34 interviews with Watchet Harbour Marina Users to ascertain the range and type of marine support businesses that would be of most value to boat owners at the marina. The results are shown in Appendix 1.

The survey concludes that a high number of users choose Watchet as a place to keep their boat because they live locally, find the operating staff friendly, and like the area. Conversely the lack of facilities & tidal restrictions were rated as the worst aspects of the marina.

- ❖ The essential services for boat owners were identified as Marine Engineering, Electrical Engineering, Boat Repairs (Including Rigging, Osmosis Treatment and Painting), Chandlery and Yacht Club).

- ❖ The second level of interest was in new and used boat sales followed by RYA Courses. Safe, convenient and secure car parking and boat winterising out of the water.

5.3 Interest in Supplying Services

We interviewed both local and external marine based businesses to establish their views on developing existing or new businesses in Watchet. The results are summarised below:

EAG Marine, Watchet

Provides the following services:

- ❖ GRP Repairs
- ❖ Electrical equipment installations
- ❖ Engineering
- ❖ Paintwork

Company details:

- ❖ Employees = 2
- ❖ Qualified engineers – aircraft industry background
- ❖ Currently working out of a car predominantly at East Quay.
- ❖ Current workload is over extended.
- ❖ 20 to 30 customers per year.

Potential requirements:

- ❖ Interested in an undercover boat repair shed.
- ❖ Maximising berthing capacity to 250 boats at Watchet to improve the potential customer base.
- ❖ Larger boat lifting equipment:
 - ❖ Bristol 50 tonne lift (generated new business) – has same size marina but the hard standing area is busy with work.
 - ❖ Portishead has a 35tonne lift.
- ❖ Chemical storage area.
- ❖ Opportunity to create an image for his company.
- ❖ Tidy up aesthetic quality of yard / area.

Potential employment growth: Considering employing two apprentices.

Payment for Facilities: Consider paying £3K for space per annum over a 2-3 year sliding scale.

Advanced Marine, Portishead Marina (250 boats)

Provides the following services:

- ❖ New outboard and engine sales / servicing.
- ❖ Represent 7 main engine / outboard dealerships.
- ❖ Electrical installations.
- ❖ Rigging.

Company details:

- ❖ Employees = 5
- ❖ Has experienced businesses springing up as Portishead Marina grows; there are now twice as many marine businesses as there were two years ago.
- ❖ Currently carries out work for a number of boats based at Watchet.

Potential Requirements:

- ❖ Interested in satellite business at Watchet.
- ❖ Undercover facility required to sell new outboards.
- ❖ New outboards generate installation & warranty work.

Premier Outboards

- ❖ 1 man – mobile outboard engineer, has been in business 40 years.
- ❖ Interested in setting up a pick up point or one day a week outboard clinic at East Quay.
- ❖ A lot of trailers are not road worthy & so people will not always bring the boat to you.
- ❖ Believes being tied to a marina will not provide enough work for one person and have to be prepared to travel.
- ❖ Provides services to fishing boats and pleasure boats.

DB Marine:

- ❖ Outboard / Sterndrive Engineer, Based at Taunton.
- ❖ Services sports and fishing boat engines.
- ❖ Subcontracts to 2 people who carry out work in the busy season.
- ❖ Time between end of October and February is very quiet. If Watchet was able to attract incoming fishermen to leave their boats at Watchet to take part in the winter fishing season this would help to maintain work through out the year servicing engines.
- ❖ Would be interested to relocate to Watchet but not with the current capacity level and type of craft that is berthed at Watchet.

Bay Island Voyages, Cardiff

- ❖ Provides day outings on fast ribs for corporate entertainment and parties.
- ❖ Large fast ribs are able to get across the Bristol quickly in reasonable conditions.
- ❖ Watchet was considered too restricted by the tidal assess to operate out of for a day trip company.

Ancaster Brokerage

- ❖ Ancaster comprises 25 brokerage offices in UK and Europe.
- ❖ Operate a wholly owned and franchise brokerage businesses.
- ❖ Consider 400 to 450 boats to be the minimum number of boats required at a marina to make a viable business.
- ❖ Ideally the brokerage would be located in an area with a larger boating population than just what the marina site can offer.
- ❖ In their experience a number of boat owners based in the Bristol area will keep their boats on the South Coast rather than sail in the Bristol Channel.
- ❖ The ideal customer base is cash rich and time poor which allow the brokerage to provide a service.
- ❖ The Watchet area was considered to provide “slim pickings”.
- ❖ Interviewee has a lot of experience of small marinas in France and believed that there is an opportunity to provide employment via the essential marine engineering and boat repairs operations, but was concerned about the Watchet location currently not providing an adequate number of boats or the correct wealth to make additional services industries viable.

Force Four Chandlery

- ❖ Force Four Chandlery comprises of a group of three chandleries based in Bristol, Lymington and Poole.
- ❖ Interviewee felt that a chandlery operating out of Watchet would find it difficult survive based on the limited number of boats based at the marina and the very seasonal nature of the area.
- ❖ Many customers that purchase from Bristol location keep their boats at Poole.
- ❖ View was that a small chandlery open during the summer season focussing on essential items could work at Watchet.
- ❖ Receptive to the potential idea of locating a satellite shop window for his business that held the essential stocked items but could be supported by broad stock holding from other sites.

Portishead Quayside Marina Ltd

Provides the following services:

- ❖ Chandlery and new outboard and engine sales / servicing.
- ❖ Represent 4 main engine / outboard dealerships.
- ❖ Electrical installations.

Company details:

- ❖ Employees = 3 full time and 3 part time (2 of the part-timers carry out anti fouling in the spring time).
- ❖ Chandlery / Office comprises of 3 portcabins.
- ❖ The engineering facility is undercover.
- ❖ The chandlery would not survive as a stand alone business with out the support of the engineering business.

Potential Requirements:

- ❖ Potentially interested in a satellite business at Watchet at a subsidised rate if the facilities and number of boats moored at the site was at full capacity.

Generally potential businesses were not forthcoming about the rental costs that they would be prepared to pay for premises at Watchet, as there was no detail available about what the type of facility might be at this stage, and how the area might be upgraded in the future.

Rental rates within the Bristol Channel area range between £8.50 to £12.50 per sq ft. The lower level should be considered more appropriate for Watchet. Industrial buildings were charged at around £5.00 per sq ft.

A large under cover boat shed of about 40 x 75 ft should be able to obtain a rental between £8 to 10K per year in a mature location.

One interviewee suggested that Watchet would require a short term rent free period and there after an increasing sliding scale rent rate.

6 Employment

The number of people employed in Watchet in connection with the marine industry is summarised in Table 6.1.

6.1: Current Marine Related Employment at Watchet		
	Full Time	Part Time
Watchet Harbour Marina	3	2
EAG. Marine Boat repairs, refits	2	
Professional Sea Anglers	4	2
Developing Corporate entertainment, RYA Training, Boat Charter		2
Visiting Trades		3
Total	11	9
Note: The number of visiting trades may equal one full time job in respect of time employed at East Quay.		

To provide context on the potential levels of marine related employment at Watchet, we have attempted to identify typical employment levels at several other marinas. Table 6.2 below shows the number of people employed at a marina / boatyard per boat moored at a marina.

The analysis suggests that between 14 and 29 jobs could be created at Watchet excluding the fishing trip boats, which are unique.

6.2: Marina related employment: Typical values							
	Ridge Wharf	Penarth	Milford	Hythe	Northney	Tron	Watchet
Berths	166	300	250	444	250	350	250
Employees	12	19	17.5	29	36.5	41	14
Ratio	0.07	0.06	0.07	0.07	0.15	0.12	0.06

Based on the detailed recommendations made in the next section, Table 6.3 identifies the number of potential marine related employees in Watchet with the marina operating at full capacity.

6.3: Potential Marine Related Employment at Watchet		
Employed	Full Time	Part Time / Seasonal
<i>East Quay:</i>		
Marina Office, Berthing, Maintenance, Boat Lifting, Car Park Valet Service.	4	2
Marine Engineering, Electrical Engineering, Rib & Small Motor Boat Sales	2	
Boatyard Repairs, Refits, Shipwrights, Rigging, Antifouling. If undercover storage provided also painting & osmosis treatment.	3	2
Chandlery (Equipment / Clothes) & Cafe	1	1
Brokerage, Marine Finance, Insurance, Holidays		1
Corporate entertainment, RYA Training, Boat Charter	1	2
RYA Courses, Charter & Boat Hire	1	
Professional Sea Anglers	5	3
<i>East Quay Total</i>	17	11
<i>Paper Mill:</i>		
Rib or Small Motor Boat Building	4 - 6	
SS / Metal Fabricators	1	
<i>Paper Mill Total</i>	5 - 7	
Total at East Quay plus Paper Mill	22 - 24	11

7 Detailed Recommendations

The research shows that there is significant potential for additional marine-based services in the Watchet locale. However, to unlock the latent demand the following must be achieved:

- ❖ Maximise the number of boats parked at East Quay to obtain a critical mass that will generate a number of support businesses.
- ❖ Maximise the number of boats that visit Watchet to provide additional income.
- ❖ Maximise the number of non-boating visitors to generate the greatest potential income earning opportunity for local businesses to become profitable enough to reinvest back into their property and services. The more desirable Watchet becomes, the more attractive it will become to boat owners.

It is recommended that the following actions take place to facilitate this:

1) Provide high quality boat owner personal facilities that are located in attractive buildings at East Quay that fit into the coastal quayside environment

- ❖ Find an innovative way to provide the YHA recommended 200 secure car parking spaces with easy access to the marina (see table overleaf). Possible options might be:
 - ❖ To create underground and / or multi storey parking facilities at East Quay.
 - ❖ Consider the Eastern Marina wall to be used for additional summer car parking space.
 - ❖ A cost effective option taking less space would be to provide a valet service that operates from the marina office. Locate a holding car park for 50 spaces with a drop off point at East Quay. The Marina office could operate a valet service taking the berth holders cars to a secure CCVT surveillance site at the Paper Mill location providing another 150 plus car spaces. The car is left parked at the quay and keys left with the marina office, marina staff remove the car to the Paper Mill site and return it before the owner requires the car again.
- ❖ Provide a private new attractive facility that accommodates the required number of YHA recommended WCs, Showers, Washing and Dryers with high quality décor and fitments (see Table 7.1). The washing and shower room should be cleaned 4 times a day during the busy weekends and 2 times a day during the week.

7.1: The YHA recommendations applied to Watchet Harbour Marina

	Specification		For 250 Boats
Car Parking (Space = 4.8 x 2.4m):			
Number of Car Parking Spaces for staff	1		5
Number of Car Parking Spaces per berth	0.75		187
Additional for vessels over 40 ft	1.5		6
Additional for charter yachts	3		3
Personal Services:	Male	Female	
Number of WC's - 1 per / no. of berths	50	50	5M / 5F
Urinals - 1 per / no. of berths	75	-	3
Wash Hand Basins - 1 per / no. of berths	50	75	5M / 3F
Showers - 1 per / no. of berths	75	75	3M / 3F
Deep Sinks - 1 per / block	1	1	1M / 1F
Family Bath Room			N/A
No. of washing machines - 1 per / berths	300		1
No. of drying machines - 1 per / berths	300		1

- ❖ Provide the correct level of YHA recommended waste and recycling disposal units in a discreet position on the site.
- ❖ Provide a new attractive Marina Office (approx 3.5m x 3.5m) that could possibly be positioned at the entrance to East Quay overhanging the marina. This building could also accommodate the coastguard and / or the tourist office.
- ❖ Maintain the current knowledgeable and friendly service.
- ❖ Aim to keep a degree of privacy for boat owners, many of which use their boat as second home accommodation.
- ❖ Provide WiFi Internet Access.
- ❖ Provide good places to eat out & drink:
 - ❖ A yacht club would be desirable but probably difficult to sustain during winter months unless subsidised. Additional income can be

obtained by renting out for other functions and use as a venue for local meetings.

- ❖ The current building located on the Esplanade where the coast guard / snooker room is currently housed would make an ideal restaurant / bar which would attract tourists, locals from the village, berth holders and visitors from the marina. This location could also provide the opportunity to sit outside in the summer. There would be a wide opportunity to sell breakfast to boaters, ice creams to tourists, lunch and evening meals. The redevelopment of this building would also free up important space required on East Quay. An example of successful similar premises can be seen at Mylor Yacht Harbour.

2) Provide the essential boat yard support services that boat owners require to operate their boat at East Quay

Marina Services:

- ❖ Provide a new 35 tonne 360 degree turn Static Power Crane with a cradle transporter.
- ❖ This will increase the boat size lifting capacity to take larger craft out of the water.
- ❖ The static power crane is cost effective and is quiet to operate.
- ❖ Boats can be parked around the yard with a cradle transporter / tractor which will prevent the current surface damage with the existing crane.
- ❖ This equipment will raise the professionalism and install confidence.
- ❖ Provide space to locate a dry stack system for boats in the next phase when the marina has reached full capacity. The approximate required building size would be a 20 x 6m allowing for a capacity of 60 boats when stacked 3 high.

Boat Repair Services (Undercover Repair Facility):

- ❖ The approx. required building size would be a 23 x 12m Footprint. This proposed size would represent approx 1/3rd of the White Haven proposed Boat Building Facility.
- ❖ There is a lack of undercover boat repair facilities in the area and such a facility would help to bring work to Watchet aiding employment stability.
- ❖ An undercover facility would provide the opportunity to carry out more extensive refits; osmosis treatment and painting would be able to be carried out during the winter months.
- ❖ Ideally this building would be rented to a business offering a number of services ranging from Fibre Glass Repairs, Shipwright, Rigging, Painting, Antifouling, Osmosis Treatment, and Winterisation... This will allow the business to cover its overheads with a broader offer.

Marine Engine & Outboard Engineering & Sales, Electrical Engineering & Sales, New Rib & Small Motor Boat Sales:

- ❖ The approx. required building sizes for a workshop area to be 10 x 10m. A small under cover Rib / fishing boat & new outboard engine sales building would be approx. 10 x 10m.
- ❖ Modern larger outboards are becoming more electronically demanding making marine engineering and electrical engineering a good potential to combine services.
- ❖ The majority of outboard engine brands now also own rib & small motor boat manufacturing brands, which they often sell through the outboard sales outlets.

Chandlery / Cafe:

- ❖ The approx required building size for a Chandlery / “Star Bucks Style” Café (Service Area) floor area to be 8 x 8m with an attic style second area to provide a place to sit with tables and chairs. Outdoor tables and seating also to be provided. The café should have an internet terminal and a balcony overlooking the marina.
- ❖ The chandlery location should be close to the marina entrance allowing access for non boaters to buy clothing.
- ❖ The attic room could be also used for RYA training and other meeting room requirements.

3) Provide facilities for other marine related businesses at East Quay

Brokerage: The approx. required building size for a brokerage floor area to be approx 3.5m x 3.5m.

RYA Courses / Training: Hythe Marina Village has a number of marina village home owners that operate from home who are semi retired creating an additional income from there yachts by providing RYA training.

Boat Trip Selling Station next to / part of the Tourist Office to market and book space for:

- ❖ Sea Angling Trips.
- ❖ Day Trips / Corporate Events in Large Ribs (Difficult with restricted Tidal Access)
- ❖ Skippered Yacht Charter (Long Weekend or Week excursions): 60 ft Danish Coast Sailing Cruiser; Large Power Boats

Pick – up point / storage area (1.5 x 1.5m) for Sailmaker repairs.

4) Provide short term support for Watchet based marine businesses to develop sustainability in the long term

- ❖ Initially provide subsidised rentals for the facilities to allow companies to become established during the period it takes for the area to reach it's full potential. The level of subsidy could be reduced each year.
- ❖ Maximise the number of boats parked at & visiting Watchet to improve customer base / earning opportunity.
- ❖ Target additional business from outside of the Watchet area i.e. repair work, insurance repair work, boat sales, internet retail sales...
- ❖ Attract one or two multi – skilled services businesses providing a larger income to cover overheads and the ability to job share.
- ❖ Try to cluster with existing companies already operating in Portishead and Bristol who can share overheads, job share and demand larger volume discounts from suppliers.
- ❖ Restrict access to non-qualified and non-insured one man bands working out of cars who are undercutting prices.

East Quay Buildings / Site:

- ❖ New buildings would be the most desirable in terms of the visual impact and positioning. However, new buildings require a long term view with regard to ROI.
- ❖ Existing boat yard buildings could be timber clad to provide a dockside warehouse appearance in line with Watchet's commercial history. An example of this was achieved at the Cornish Maritime Museum.
- ❖ The shed could be made into a two storey building to increase the entrance height to allow larger boats to be able to be stored inside.
- ❖ Should residential properties be developed at East Quay they could be targeted at retirement customers with an extended marina berth for 10 to 20 year period.

Creating space at East Quay for events to bring additional people to the area:

- ❖ It will be a very popular decision with the local community to leave space for the carnival and similar events to be able to take place at East Quay.
- ❖ Also there is potential to create new events for the area in addition to the Carnival, which will help to attract visitors to Watchet & provide interest for the local community. Examples similar to these existing events could be considered:
- ❖ Falmouth Oyster Festival i.e. Watchet Prawns.
- ❖ Yarmouth Classic Boat Festival.
- ❖ Gig Racing Events.
- ❖ Cruising Rallies in the area stopping at various harbours in the Bristol Channel.

5) Create additional mooring capacity

- ❖ Create low cost mud berths at West Quay. When the agreement for WBOA's use of marina berths on beneficial rates expires, this would offer an alternative to using the marina on the full tariff. This will release chargeable marina berths in the future at the full rate.
- ❖ Maximise the number of berths in the marina, and optimise the berth mix to maximise revenue.
- ❖ Once the marina reaches full capacity implement an under cover boat rack system for powerboats and ribs up to a 9m length.

6) Improve the general attractiveness of the area to make Watchet a more attractive place to visit by boat or as a land based visitor

The Village: The village will start to upgrade further once the income increases from the marina operating at full capacity.

The Esplanade: Provide attractive features of interest e.g.:

- ❖ Easy access to see the sea (provide a high enough walkway to see over the sea wall).
- ❖ Allow access to see the marina but also provide some privacy for boat owners.
- ❖ Provide good places to eat & drink i.e. convert the current Harbour Masters office / snooker club into a restaurant / bar with outside seating.
- ❖ Create interesting small retail outlets in the village.
- ❖ Provide some shade & rest places with trees & grass.
- ❖ Create safe & fun places for children (water fountains for hot weather).
- ❖ Create interesting features on the harbour wall: A water clock; possibly a statue at each of the harbour entrance walls.
- ❖ A lighthouse style marina office.
- ❖ Pull down the existing Radio Station, Marina Office and relocate on East Quay. This will provide a potential to develop dwellings on stilts that will provide parking underneath. Properties could be located in the area running along the currently reserved 35 Marina car park spaces along harbour road and at the back of East Quay.
- ❖ Allow the steam train to be as visible as possible from the Esplanade.

7) Watersports Centre

- ❖ The proposed site for the Water Sports Centre will not be suitable for a commercial operation due to the fast tidal waters, limited access to the sea and limited available space i.e.
 - ❖ There is only a 4 hour window available to gain access to the water. The tides are generally suitable every other week.
 - ❖ Wind can make conditions too aggressive for children preventing further access.
 - ❖ Overhead cables are to be considered when moving dinghies with masts through the town.
- ❖ The area currently used by the Sea Scouts where the portacabin / container are located could be made into a clubhouse that could also cater for other local youth orientated sea activities such as a Rowing Club.
 - ❖ The premises could be built on stilts to provide additional under cover boat storage.
 - ❖ The building could provide a classroom, small kitchen, toilet and showers.
- ❖ The public slipway ideally needs to be lengthened to allow additional access to the water.

8) Mineral Yard (WBOA)

- ❖ Needs to be maintained for low cost local boat owner's storage use.
- ❖ Health & safety regulations need to be observed when using boat moving equipment.
- ❖ Potentially the area could be used to store visiting boater owner's trailers during the summer when the local boats will be kept in the water. This revenue could provide an income to help maintain the site.

9) Paper Mill

- ❖ The Paper Mill site could be used to provide secure excess car parking spaces as an overflow for the marina.
- ❖ The site could also house marine and other light industry. Boat building activities could take place at the Paper Mill, which could provide from 4 to 6 job opportunities depending upon the level of success, which would relate to the level of support provided.

8 Appendix 1: Watchet Harbour Users Survey