



# ICOMIA 2-3-4 JUNE 2014 | ISTANBUL | TURKEY

# WORLD MARINAS

## Conference 2014






MARINAS INTO THE FUTURE

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# WORLD MARINAS

## Conference 2014

## What the clients want

## Future aspects of Marina Services

## Results from surveys in Germany

Research Association Recreational Boating Industry (FVSF)  
 Dipl.-Ing. Dr. Wolf-Dieter Mell, Institute for Boat-Tourism (IBoAT)

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Data from several studies  
on boats and owners in Middle Europe  
done by the  
Research Association Recreational Boating Industry  
of the German Marine Federation

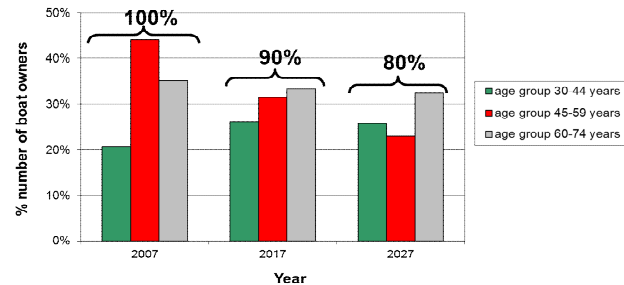
among others:

- Structures in the boat market (2008)
- Physical capacity of boaters depending on age and gender (2009 and 2012)
- Requirements on marinas (survey 2013)

Similar survey  
about the requirements on marinas  
done by the  
Waterrecreatie Advies BV Netherlands

- Water Tourism in the IJsselmeer region  
in 2013  
([www.waterrecreatieadvies.nl](http://www.waterrecreatieadvies.nl))  
very similar results

## Boat Owners: Demographic changes in Middle Europe

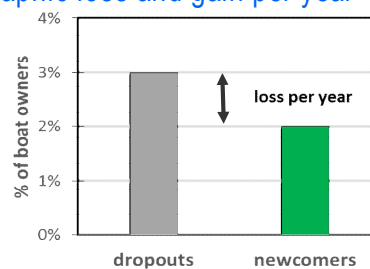


- The number of boat owners decreases with about 1% per year
- In the near future the elderly will be the greatest age group
- The hope: The proportion of young newcomers will rise again

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## Boat Owners: Demographic loss and gain per year



- Per year: 3% elderly boat owner drop out  
=> every year +3% of the boats go second hand on the market
- Per year: about 2% (young) newcomers  
=> looking for a second hand or a new boat and a mooring
- Per year: 1% less clients

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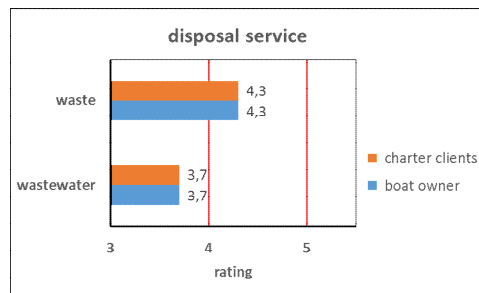
## Requirements on marinas (1)

Survey of German skippers, separated by "boat owner" and "charter clients"  
rating of the requirements:

- $\geq 5.0 \Rightarrow$  indispensable, must have
- $\geq 4.0 \Rightarrow$  very important
- $\geq 3.5 \Rightarrow$  important
- $< 3.5 \Rightarrow$  nice to have

### 1. disposal service

- for waste: **very important**
- for wastewater: **important**



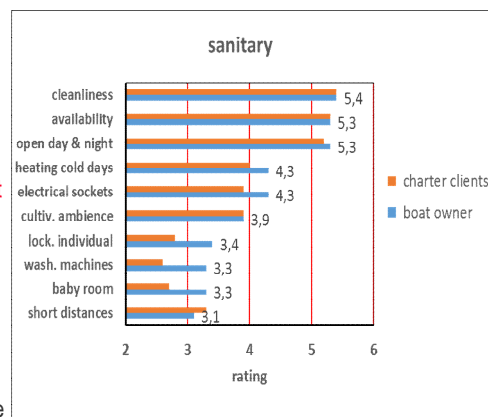
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## Requirements on marinas (2)

### 2. sanitary facilities

- cleanliness: **must have**
- availability: **must have**
- day & night: **must have**
- heating cold days : **v. important**
- el. sockets: **very important**
- cultivated ambience: **important**
- lock. indiv. washrooms: **nice**
- baby room: **nice**
- washing machines: **nice**
- short distance to sanitary: **nice**



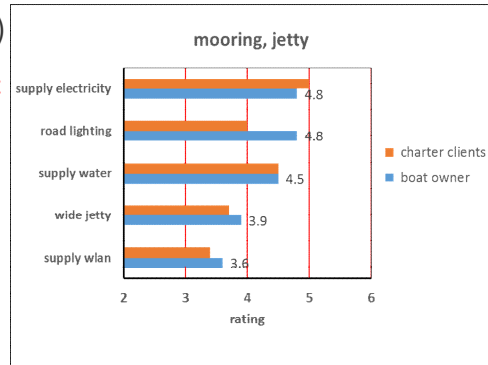
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### Requirements on marinas (3)

#### 3. mooring, jetty (walkway)

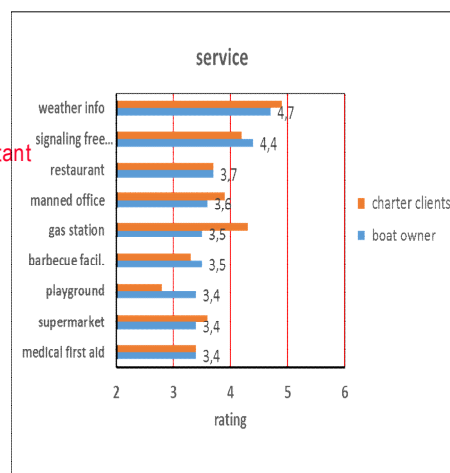
- supply electricity: **very important**
- road lighting: **very important**
- supply water: **very important**
- wide jetties: important
- supply WLAN: important



### Requirements on marinas (4)

#### 4. services

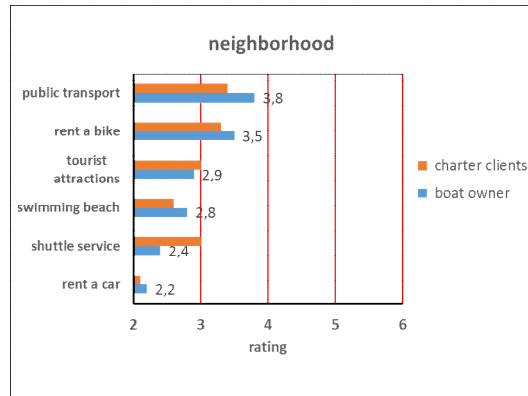
- weather info: **very important**
- signaling free moorings: **very important**
- restaurant: important
- manned harbor office: important
- gas station: (**very**) important
- barbecue facilities: nice
- children's playground: nice
- supermarket: nice
- medical first aid: nice



## Requirements on marinas (5)

### 5. neighborhood

- public transport: important
- rent a bike: nice
- tourist attractions: nice
- swimming beach: nice
- shuttle service: nice
- rent a car: nice



## Requirements on marinas (6)

### 11 very important client requirements on marinas

ranking	requirement group	requirements	boat owner	charter clients
1	sanitary	cleanliness	5.4	5.4
2	sanitary	availability	5.3	5.3
3	sanitary	open day and night	5.3	5.2
4	mooring. jetty	supply electricity	4.8	5
5	mooring. jetty	road lighting	4.8	4
6	service	weather information	4.7	4.9
7	mooring. jetty	supply water	4.5	4.5
8	service	signaling free moorings	4.4	4.2
9	disposal	waste	4.3	4.3
10	sanitary	heating on cold days	4.3	4
11	sanitary	electrical sockets in sanitary	4.3	3.9

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## Summary

The standard Middle European boat enthusiast

- is a middle class citizen
- with an own middle sized boat  
or a charter boat a bit bigger
- many of them older than 60 and retired
- spending more time on his boat in the marina then the younger
- with decreasing physical strength and flexibility
- accustomed to a middle class comfort

and that he wants to enjoy in the marina as well

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## Thank You !

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