

**HAYLE MARINA STUDY  
SUPPLEMENTARY  
RESEARCH**

Prepared by Richard Gerald Associates Ltd (RGA)  
on behalf of ING Real Estate Development UK (ING)

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## **1. INTRODUCTION**

### **1.1 PROJECT BACKGROUND**

ING Real Estate Development UK (ING) have acquired Hayle Harbour and the Harbour Operating Company and are currently preparing to submit details proposals for planning and Harbour revision consent for a significant mixed use regeneration development in the Spring 2006. ING have established a well respected project team to bring the project to fruition including:

Masterplanning Architects	FSP
Engineers	Buro Hapold
Cost Consultants	Deacon & Jones
Environmental Consultants	The Environment Practice
Socioeconomic Consultants	Roger Tym & Partners
Grant & Public Sector Consultants	Additional 2

### **1.2 PRODUCT**

Key components within the scheme include:

- Regenerating the harbour area itself by repairing the historic harbour structures and developing a revolutionary half tide barrier and lock, and creating a marina. A new bespoke harbour area for the fishing fleet will be constructed outside the tidal barrier.
- 700 residential units will be constructed to the north of Hayle centre; a new ‘village’ on the old north quay.
- 500,000 square feet of commercial, community and cultural space.

### **1.3 PURPOSE & SCOPE**

RGA’s Hayle Marina Study, March 2005, demonstrated that there was sufficient demand for a new, profitable, marina in Hayle. Subsequent changes in the marina plans resulted in a need for RGA to re-examine a number of aspects of the marina, notably the berthing price structure. The inclusion of dry berths in particular needed to be examined and there was a need to assess the operational requirements of the local, resident boat owners. The views of the Hayle Harbour Users Group have been taken into consideration when looking at both charging rates and the overall operation of the marina and the water space. It is important for the overall success and sustainability of the marina that a “fair” level of charging should be proposed for the local resident groups. RGA undertook site visits to other ports and harbours in the South West of England to examine their rate structures and modus operandi.

Hayle Harbour has had a number of owners in recent years and this has impacted on relations between the Hayle Harbour Users and the Hayle Harbour Authority/Port Operators. ING have taken on board the necessity of listening to the views of various user/interest groups when looking at how best to develop the water and related shore areas. It is believed that this approach will engender goodwill amongst the user groups and result in a better operation in the long term. The owners and users of the smaller vessels are concerned that they will be “pushed to the back” when the greater development plans are produced and for this reason they have been quite vociferous about their requirements. A meeting with the chairman of this group confirmed this view. Generally the residents and boat users of Hayle are very supportive of ING and their overall plans and so long as they are fairly considered in the final proposals will support the development of Hayle Harbour by ING. This report will address the concerns and proposed solutions for the local boat owners. At the same time other issues that resulted from interviews with various operators and individuals will be summarised for consideration by ING.

This report is supplementary to the initial Hayle Marina Study and should be read in conjunction with it.

#### **1.4 METHODOLOGY**

RGA have undertaken the following tasks in the preparation of this Study:

- Visited the site and interviewed the Harbour Master;
- Met with the Hayle Harbour User Group;
- Visited competitive marinas and tourism destinations within the ‘market area’;
- Met with project architects, FSP, in Hayle to be briefed on the master-plan;
- Visited key marinas, harbours and ports within the market area to assess mooring demand, pricing and interviewed the key operational personnel and
- Provided an indication of potential marina performance, throughputs, revenues and staff costs with assumptions.

## **2. FIELDWORK**

### **2.1 RESEARCH STRUCTURE**

RGA visited key marinas and harbours in the region over a four day period and interviewed the following key individuals:

- a. John Brown – Hayle Harbourmaster – employed by ING
- b. Stephen Basset – St Ives Harbourmaster
- c. Neil Clark – Penzance Harbourmaster
- d. Cpt. Trevor Platt – Padstow Harbourmaster
- e. Robb Lello – Chairman of Hayle Harbour users group
- f. Newquay, Watchet Harbour Marina, Portishead Quays Marina
- g. Visited Bristol Marina and Bristol Floating Dock

The interviews explored comparable areas of operation to Hayle, potential user and operational issues and examined the charging structure. Interview summaries are presented in the Appendix. The local harbours were visited to see what level of charges are currently being levied on local boat owners, whilst the marinas were visited to re-check that the proposed charges contained in the initial report are still fully attainable. During the first visit the main yachting areas and harbours of South West England were studied to look at the service provision requirements at Hayle Marina, to discover the initial level of demand and to establish a base charging level for the proposed development. During this visit a more detailed study of charging and an assessment of competition on the Bristol Channel was carried out.

### **2.2 MARINA DEMAND**

Initial enquiries revealed that, despite having to berth in quite difficult conditions, boat owners are happy to sail in the Bristol Channel.

- Some sail in the Channel for the challenge it presents.
- Some like the small harbours.
- Others are finding it increasingly difficult to locate convenient berths in South Devon and Cornwall at reasonable prices, if at all.
- A number of boats moored in the various Cornish Harbours are owned by locals or people with houses in the local area.

The demand for berthing is very high with all the full service, floating marinas being full and the majority of the harbours having waiting lists in excess of 3 years. Enquiries prove that there is a continued demand for berthing of all types and that full service, floating marinas attract larger boats whose owners are happy to pay a premium for the best facilities.

### **2.3 PRICING**

The prices set during the first phase of the Study are competitive with Portishead Quays Marina and those on the south coast of Cornwall. It is recommended that this level of charging is adopted (adjusted for inflation) when the marina is developed for occupation. Table 1 highlights the pricing structure at the competitor marinas and the proposed Hayle pricing structure.

Table 1: Pricing Structure and Comparison

Tariff Item	Proposed Hayle Marina Rate £	Hayle Harbour Current £		Portishead Quays £	Penarth Quays £		Watchet Harbour £		Penzance Harbour £		Padstow Harbour £		St Ives Harbour £	Car parking is extra at price
<b>Annual Berthing 15m</b>	295/m <b>£4,425</b>	<b>£367</b>	Mud berth Inc harbour dues	225/m <b>£3,375</b>	239/m <b>£3,585</b>	High quality Locked Marinas – similar std to Hayle as proposed	190/m <b>£2,850</b>	Still marina, which has silting problems - just been sold	Floating <b>£1,916</b>	Very commercial setting. Otherwise drying like St Ives	Drying <b>£560</b>	Good inner basin floating, otherwise drying moorings	Seasonal <b>£407</b>	Pretty harbour, many parking probs, all drying moorings
<b>Annual Berthing 10m</b>	Floating <b>£2,950</b>	<b>£342</b>	Drying	Floating <b>£2,250</b>	Floating <b>£2,390</b>		Floating <b>£1,900.</b>		Drying/ 6mth <b>£322</b>	Up 20% for 2006	Drying <b>£336</b>		Seasonal <b>£300</b>	Drying
<b>Annual Berthing 6m 6 months</b>	Floating <b>£1,200</b>	<b>£93</b>	Drying	Floating <b>£1,000</b>	Floating <b>£1,100</b>	Special rate	Floating <b>£1,150</b>		Drying/ 6mth <b>£93</b>	Up 20% for 2006	Drying <b>£233</b>		Seasonal <b>£300</b>	Drying
<b>Visitor per day</b>	<b>£15.00/ day min</b>	<b>£5.00/day</b>		<b>£15.50/ day min</b>	<b>£14.00/ day</b>		<b>£22.50 min</b>	2.25/m	<b>£11.70/day Min</b>	Inner Harbour	Drying <b>£10.65</b>		Drying <b>£10.00</b>	

Source: RGA



Local boats are not paying the going mooring rate and prices in Hayle have not kept pace with inflation. The Harbour Masters at St Ives and Penzance both believe that prices are too cheap and need to be adjusted upwards during the next few years in order to bring them back into line. At Penzance the Council have agreed a 20% price increase on the moorings for the 2006 season.

When looking at pricing for the local, smaller boats and bearing in mind that for the overall development of Hayle to move forward the developers need good local support, it is important to bear in mind that rates of pay in the area are very low. There are a lot of part-time workers and there is a degree of unemployment among the local boat owners. Boating is a traditional pastime for many of the residents of Hayle. Against this it should be considered that local users of boats at Hayle will enjoy better facilities, access and parking post development and therefore it would not be unreasonable to expect them to pay slightly more than in other local harbours.

RGA feel a local boat rates based upon the following tariff should be adopted;

- Mud Berths £150 per season
- Pontoon Drying Berth £350 per season (in the areas proposed by FSP).

#### **2.4 LOCAL USER GROUPS REQUIRED FACILITIES**

The identified requirements of local boat owners are not extensive, and in the main FSP have provided for them. The main ones are;

- Reasonably accessible free car parking.
- If parking is not available at the mud berths, as it is currently, then there should be a few unloading areas at the mooring area.
- The free use of a scrub down/drying out berth for maintenance.
- Water standpoints would be useful as would coin-operated power points.
- Unrestricted access to their boats and easy tidal access for boating.
- A pontoon for some local boats would be appreciated, and some owners would pay more for it.

## 2.5 KEY ISSUES FOR LOCAL HARBOUR USERS

During the Fieldwork exercise a number of key issues for the local harbour users were voiced;

- A fair and active mechanism for consultation with the developers needs to be established. Feedback and regular updating on development issues as they affect residents would be appreciated.
- Once the development is complete, there should be an on going means for all the interested user groups to have an active voice about the operation of the Harbour.
- Many of the users are concerned that the dredging regime may not work and have concerns about the removal of the cockle bank and the positioning of the dredging sump. The current channel is very narrow just to the north of the proposed commercial harbour, will this be widened, and will the sluicing keep it wide? The current can run at up to 5 or 6 knots at this point.
- They believe that there are safety issues to consider for leisure users at the Harbour entrance in difficult conditions. They have suggested that the “Users Group” could help with education and notification. The channel will migrate quite a lot, how will this be marked/ buoyed?
- If Penpool Creek is to be fully impounded with a tidal flap where will the current boats be relocated and how much will they pay?
- There are concerns that the proposed commercial harbour may be too small and that the size may inhibit the success of Hayle as a port in the future.
- If jet-skis are to be allowed to launch within Hayle Harbour, who will police their behaviour and how the use will be controlled? They have pointed out that Jet-skis/ PWCs can be a hazard to navigation and accidents have happened.
- If there is to be a yacht club/ boating club; who would operate it?

## 2.6 OPERATIONAL CONSIDERATIONS

From discussions with the other Harbour Operators (at Penzance, St Ives, Padstow) the main issues when looking at the general management of the recreational and commercial use of any harbour is to keep a fair balance. It is not unusual for Local Boat Owners and the smaller Fishing Boats to be favoured with a beneficial rate. The logic behind granting the reduced rates is that generally these are not wealthy individuals and if they are inclined to be supportive of the harbour operation they can help create “positive energy” in the locale. This can enhance the local visitor experience and encourage tourism spend. If not given a fair berthing rate many of the small boat owners would simply give up boating. For a harbour to be active at all times of the year, it is necessary to encourage local boat ownership and commercial activity.

It is reasonable to allow the local residents to be able to air their views on matters that can affect them, but it is important that the vehicle for this is set up in such a way that the “Local Voice” does not disproportionately and adversely affect the many other equally valuable issues that need to be considered when running a harbour that is the focus of a town.

### **3. REVENUES & OPERATING COSTS**

#### **3.1 INTRODUCTION**

RGA have updated the key financial models from the 2005 Study following the findings of this report and this section will present the projected Marina Operating Profit and Loss. This should be read in conjunction with the 2005 report.

### 3. Revenues & Operating Costs

#### 3.2 MARINA INCOME

**Table 2: Projected Marina Revenues (inclusive of VAT)**

Marina Revenue Stream	Assumptions/ Comments (prices at 2005 figures, inc VAT, per price list)	Total Estimated Marina Revenue Yr 1	Total Estimated Marina Revenue Yr 2	Total Estimated Marina Revenue Yr 3	Total Estimated Marina Revenue Yr 4 200+ boats
Annual Berthing	As year 1 is after engineering is complete and marketing has taken place, we can assume 100% occupancy in the summer. 70% Annual and 30% Summer berthing. Assumes sizes as per Phasing table.	£86,730	£144,550	£214,760	£413,000
Summer Berthing	20m will only stay summer, they'll service elsewhere, as hoist too small	£33,840	£52,170	£71,910	£141,000
Small Boat Rate	Assume all boats under 7m take Small boat rate - at floating pontoon - 40 @ say £350	£14,000	£14,000	£14,000	£14,000
Small Boat Rate	Assume all boats under 7m take Small boat rate - mud berths - 60 @ 125-00	£7,500	£7,500	£7,500	£7,500
Monthly Berthing	Visiting boats taking "boats away" spaces - very few will take monthly	£-	£-	£-	£-
Weekly Berthing	Visiting boats taking "boats away" spaces, 15 p/wk for 3 mths @ 10m	£25,500	£25,500	£25,500	£25,500
Daily Berthing	Visiting boats taking "boats away" spaces, 20/wk for 3 months @ 10m	£6,000	£6,000	£6,000	£6,000
Storage on Hard/ mth	In the summer few boats go on the hard monthly - probably 10/m for 6mths @ 10m	£7,500	£7,500	£7,500	£7,500
Storage on hard/ wk	Boats will come in for service work, more in early April and May, 10/wk for 2 mths @ 10m	£6,400	£6,400	£6,400	£6,400
Winter Afloat	Assumes 30% of annual boats, go on hard (all inclusive in annual fee plus hoisting)	£13,000	£21,000	£30,500	£47,000
Winter on Hard	30% of boats don't pay as they are annual customers - 70 slots available average 10m (say 35 in first year)	£25,000	£50,000	£50,000	£50,000

### 3. Revenues & Operating Costs

Small Boat Winter on Hard	Boats on trailers can be put in slots and moved around. Therefore are in addition to 100 boat capacity in the yard - say 10 boats @ £300	£3,000	£3,000	£3,000	£3,000
DIY Slipway Launch	May 100, June 240, July 380, Aug 380, Sep 180 launches = 1280 x 50% for yr 1	£9,600	£19,200	£19,200	£19,200
Parking in Yard	Usage assumes everyone has to park after launching, so multiple as above	£6,400	£12,800	£12,800	£12,800
6 mth DIY Slipway Launch - inc parking	People will use the facilities a few times before they go for licences unless they are local. I suggest we assume no licences sold in Yr 1, then 20 pa		£5,000	£5,000	£5,000
Jet Ski/ small boat storage in yard. - inc parking - summer Hoisting - up to 8m to 9.9m	It is difficult to determine what the take up will be, but it will be reasonable to assume that the users will be locals, Caravan/ Holiday home owners - say 20 customers (50% yr1)	£5,000	£10,000	£10,000	£10,000
Hoisting 10m to 11.9m	Pro rata for industry norm; Yr 1- 150, Yr 2- 210, Yr 3- 286, yr4(2)- 400, Yr4(3)- 500 - av 10m	£22,500	£31,500	£42,900	£75,000
Hoisting 12.0m and over Yard Crane	Assuming 10 chargeable hrs per wk 35 wks per yr @ £35-00	£12,000	£12,000	£12,000	£12,000
Electricity/Fuel and Gas	Electricity is difficult to budget, except that charge out tends to balance income plus Marina costs, fuel/gas is assessed pro rata on industry stats. Reduced by 30% for more static boats and smaller average size	£10,000	£14,000	£20,000	£36,000
Contractor Income	Typical expenditure per boat (10m) = £1,500. Each boats earns approx £150 in commission	£10,000	£14,500	£20,000	£35,000
					**
<b>TOTALS</b>		<b>£303,970</b>	<b>£456,620</b>	<b>£578,970</b>	<b>£925,900</b>

Source: RGA

## 3.3 PROJECTED OPERATING EXPENSES

Table 3: Projected Operating Expenses

<u>Budgeted Running Costs</u>	<u>Yr.1</u> <u>(69 boats)</u>	<u>Yr.2</u> <u>(96 boats)</u>	<u>Yr.3</u> <u>(130 boats)</u>	<u>Yr. 4</u> <u>(200 boats)</u>	<u>COMMENTS</u>
Wages and Salaries	£ 156,500	£ 174,100	£ 174,100	£ 174,100	<i>Seasonal person to oversee slipway charging - 15wks @ 40rs x £6 and extra yard hand yr2 and 3. Once reach 130 berths little extra staff input required which cannot be handled by generous staff levels to take it to 230</i>
Sales and Marketing Support	£ 15,000	£ 17,500	£ 17,500	£ 17,500	<i>Sales and Marketing company to brochure design and direct marketing and berthing Sales</i>
Printing and Stationery	£ 6,850	£ 3,100	£ 3,100	£ 3,100	<i>First yr brochure £3,750, letterheads, invoices, cards, price lists etc</i>
Website design/support	£ 10,000	£ 5,000	£ 5,000	£ 5,000	
Advertising and Marketing	£ 15,100	£ 15,100	£ 12,000	£ 12,000	<i>Allows for cruising journals, almanacs, tourist board and yachting publications (4x5mths each), Sailing Club Journals- some recruiting - reduce yr3</i>
Show costs	£ 11,650	£ 6,550	£ 6,550	£ 6,550	<i>London Boatshow and Southampton Boats how Yr1- with Tourist Board support and accommodation, second year London only, third year London only</i>
Telephone, fax, post	£ 2,000	£ 1,700	£ 1,700	£ 1,700	<i>Pro rata to similar marina operation</i>
Health and Safety	£ 3,150	£ 3,150	£ 3,150	£ 3,150	<i>Courses, publications, safety wear, first aid courses</i>
Cleaning	£ 1,800	£ 2,000	£ 2,200	£ 3,900	<i>Chemicals, consumables etc</i>

### 3. Revenues & Operating Costs

Hoist Repairs	£	1,000	£	3,500	£	5,500	£	9,700	<i>Warranty in first year (£1,000 represents recalibration and new cable cost), after that tyres, cables, strops, servicing</i>
Small Tools	£	1,000	£	600	£	600	£	600	
Pontoon Repairs	£	-	£	500	£	7,500	£	13,200	<i>Warranty in first years. Pro rata similar marina operation</i>
Plant Diesel	£	2,600	£	3,000	£	3,500	£	6,200	<i>Hoist, Tractor, Crane, increases for more lifts as marina expands</i>
General Repairs	£	1,500	£	6,000	£	10,000	£	13,000	<i>Vandalism and wear and tear, some contractor work for electrics, plant repairs</i>
Motoring Expenses	£	1,500	£	1,500	£	1,500	£	1,500	
Cost Sales of Diesel/Gas	£	8,000	£	11,200	£	16,000	£	28,300	<i>80% of Sales</i>
Heat Light and Power	£	6,000	£	6,000	£	6,000	£	6,000	<i>This deficit, worst case between costs and sales to berthers (office, toilets and street lights). Figures from similar marina</i>
Water	£	1,200	£	1,600	£	2,100	£	3,700	<i>Taken pro rata from previous marina operation</i>
Rates and sewage	£	5,000	£	6,500	£	8,000	£	14,100	<i>Estimate</i>
Credit Card Commissions	£	850	£	1,200	£	1,625	£	2,900	<i>Pro rata to similar marina operation</i>
Administrative Head Office Charge	£	25,000	£	25,000	£	25,000	£	25,000	<i>From previous Marina experience</i>
Dredging									<i>Impossible figure to budget until we discuss with the engineers</i>
Legal	£	2,000	£	1,000	£	1,000	£	1,000	<i>Estimate</i>
Accountancy	£	3,000	£	3,000	£	3,000	£	3,000	<i>Estimate from accountancy firm</i>
Insurance	£	4,000	£	5,000	£	6,000	£	10,600	<i>From previous experience</i>
Memberships/ Licences	£	800	£	1,000	£	1,200	£	2,100	<i>Tourist board and Tyha</i>
<b>TOTAL</b>	£	<b>285,500</b>	£	<b>304,800</b>	£	<b>323,825</b>	£	<b>367,900</b>	



### 3.4 SUMMARY OPERATING PROFIT & LOSS

The projected operating profit and loss is stated without inflation and assumes:

- No material changes in market conditions
- Competent management and effective marketing
- Facilities and operations described to us.

	<b>Yr.1</b> ( 69 boats)	<b>Yr.2</b> ( 96 boats)	<b>Yr.3</b> (130 boats)	<b>Yr. 4</b> (200 boats)
Income (net of VAT)	£ 250,775	£ 376,382	£ 477,650	£ 763,868
Total Expenses	£ 285,500	£ 304,800	£ 323,825	£ 367,900
Operating Profit (EBITDA)	<b>-£34,725</b>	<b>£ 71,582</b>	<b>£ 153,825</b>	<b>£ 395,968</b>

Source: RGA estimates

Notes:

- 1) By year 4 the Marina could be envisaged as supporting tenancies for such commercial activities as: boat sales, electronics, boat repair, rigging, sailing school, chandlery. ING will need to plan for buildings for them.
- 2) Accounting policy for depreciation needs to be determined eg. pontoons 20 yrs. - hoist 15, tractor/ crane 5 yrs., buildings 25 yrs.
- 3) Sales and marketing costs are fairly high to establish the market and the one operation is bearing full costs. Generally, costs will not rise as Marina achieves over the 130 to 200+ berths; staffing, plant is non variable.

## 4. SUMMARY

This study has highlighted a number of issues that can be dealt with in the design and operational considerations of Hayle as the development advances. The interviews contained in the Appendix highlight some interesting points the developer may wish to follow up on.

Whilst many consider the local element of boat owners at Hayle to be hard to negotiate with, and at times what has been said at a meeting appears to conflict with statements that have followed, we have been given the impression that the “Users Group” is in favour of the development as proposed so long as they are listened to reasonably (and considered) as plans move forward and are amended. From discussions with other Harbour Masters the issues being raised by the Hayle boat owners are very similar to the ones they need to deal with. Padstow, in particular, seems to have tackled most of the broad range of issues that occur when operating a leisure activity, alongside a commercial activity in an area that involves public, local resident, tourism, council, notifiable bodies and commercial pressures. The trust that operates Padstow Harbour appears to be pro-active and responsible and appears to balance commercial interests well with the concerns of the general public. It would be worth speaking with the Trust members and the Harbour Master to see if there could be a business model that could work at Hayle as it matures. Neil Clark at Penzance was also well aware of how to handle the many and varied issues involved with a Harbour that is at the centre of a busy community.

Whilst there are many marinas that will be worth comparing with Hayle Marina, for ideas on how best to blend the operation within the new community, Portishead Quays Marina is at a stage Hayle maybe at in three or four year time and it would be worth striking up a relationship with the Marina Master and Quay Marinas to gain their input. Quay Marinas could well be a target tenant for operating the marina in the future should this be considered necessary. It is very apparent that the larger boats are attracted to the floating marinas and that not only does the size of craft increase dramatically in line with improved facilities, but so does the quality and value of each individual craft.

The charges proposed for the main marina and the proposals made in the main report stand up well and can certainly be adopted as the base model for setting up Hayle Marina when the time comes.

Whilst not specifically requested to comment on the positioning of the tidal flap at Penpool Quay, we agree that to impound the whole length of the Quay makes very sound sense and that it will undoubtedly enhance the appearance of the development overall and attract not only static display vessels but also larger visiting/cruising craft. This will certainly give Hayle an edge over other local harbours.

The general opinion of those interviewed was that the development of Hayle Harbour will be a good thing for leisure and commercial craft in the area and that it will be one of, if not *The*, leading marine facility on the Bristol Channel for cruising and leisure boat owners. As such it should enjoy a very high demand for berthing and create valuable revenues for Hayle.

## **APPENDIX**

### **1. Interview – Capt Trevor Platt – Harbour Master – Padstow Harbour Trust**

Padstow harbour, combined with Rock provides the areas most popular recreational boating area. Most of the boats are at moorings, whilst dinghy sailing and water skiing are also very popular. The town has been a traditional tourist spot for many years, made even more popular by the TV success of Rick Stein, the celebrity chef. The Harbour Trust does not allow the launching of PWC's (jet skis). Captain Platt retires at the end of this year and has a wealth of useful information. It would be worth speaking to him when forming plans as to how to run Hayle Harbour and handle the various interest groups.

#### **Padstow Harbour;**

- The harbour is operated to a very high standard by the Padstow Harbour Trust which was formed in 1884. The Harbour Byelaws and trust were modified in 1987 and again in 2000 and there are now 10 Trustees working with one Harbour Master (Chief Exec).
- The members are elected to represent each district (3 –Padstow, 3- Wadebridge, 3- Rock and I vote for the Lord of the Manor. The Trust handles all matters relating to the Harbours, Beaches, Vessels and Car Parking at the Harbour.
- There are many similarities between Padstow and how Hayle may operate. The commercial, leisure boating and tourism element seem to be well managed and therefore co-exist well.
- As with all the tourist harbours parking is a major concern, but in this instance is also a major source of revenue
- The commercial concerns and especially the fisherman have been encouraged to work cleanly and can lose their storage units if they don't. The commercial areas have been well designated from a Health and Safety angle and yet provide an attractive and active tourist backdrop.
- Fuel is metered on a self service basis, with an electronic card. If the commercial operators don't work according to the standards set out by the Trust, or fail to pay accounts, the card is remotely cancelled until matters are sorted out.
- There are coasters, fishing boats and tourist craft all operating from the quay, outer harbour and the floating harbour. Depending on the season there can be very large numbers of fishing boats operating out of Padstow (12' to 60'). Locally the following commercial craft operate from Padstow; 16 Crabbers, 3 large Netters, 4 small Trawlers, 12 trip boats (1x 250 passenger, 4x speed boats and 7 x 12 person trip/ fishing boats)
- Beach Masters are employed by the Trust to ensure safety and good operations at Rock. Rock Sailing and Waterski club run the moorings and pay dues to the Trust. Waterskiing is strictly zoned.

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- There are 400 leisure craft on moorings – 100 at Padstow and 300 at Rock. Boats vary in size from 35' down to 12'.
- Captain Platt has slowly installed a few small pontoons at the north end of the harbour, similar to that proposed for local boats at Hayle. Although they dry out locals are happy to pay more for having walk-aboard access at all states of the tide.
- Padstow does not have any long term berthing at the harbour, but handles 4,500 berthing nights per annum, with a maximum stay of one month. Rates are £1.50/ m per night, £9.00/m per wk and £28.00/m per month.
- There is demand for a Marina, but not enough land for parking. It would not get planning permission as a result of this.
- Visitor boats used to average around 27', but this has risen to 32'/35'. The mix of yachts to power craft has also changed significantly from 80/20 to 65/35. The motorboats are getting bigger and faster.

#### **Comments;**

- Locals and Harbour users are very complementary about how the Trust works and the benefits it brings.
- Capt Platt believes that Hayle Marina would enhance Leisure Boating in the area. He anticipates a high demand for bigger boat berthing.
- Car parking severely limits the development potential of the Harbour area.
- The principle of the Trust appears to be a good way of dealing with the local, tourism, business and social issues. It could be a solution for the smooth operation of Hayle – after the development is completed.

## **2. Interview – John Brown Hayle Harbourmaster – ING**

There are a number of issues that John has been approached about and that are concerns of his in reference to the development of the water space and related land around Hayle Harbour.

#### **Small Boat Issues;**

- The local owners are keen to have easy access to use their boats and maintain them
- Charges, or likely large increases in charges, are a major concern amongst the local users
- People have noticed that there is sailing club mentioned in the development proposals. Who is going to run it and how will affect the Hayle Harbour Users group?

- The users want to have easy slipway access for the maintenance and launching of their boats
- Most of the existing local boat owners are not well off and their boats are not expensive. Running and maintenance costs are of major concern to them.
- The small boat owners are anxious that they are going to get forgotten in all the “Smart plans”
- A lot of the local experienced boat users are expressing concerns over less experienced boat owners getting into trouble when navigating the channel and in particular the “bar” at the entrance.
- The local “users” are keen to see a “Status Quo” where their use and access to their boats are concerned. They understand the concept of progress so long as they are considered as part of that progress.

#### **Navigation Issues;**

- The tide / current can be very strong within the narrow parts of the Harbour channel, at spring tides, often reaching speeds of up to 6kts. Many yachts could be compromised by the kind of tide.
- The channel, at the entrance, periodically moves as a result of sedimentation and the weather/ wave action. How will less experienced owners cope with this.
- The Hydraulic Research Resources body expressed surprise that a marina was being included in the overall development. Is a marina really viable?
- Once a boat is out at sea there are very few places for it to go.
- It will be necessary to be very diligent in educating new users to the navigational issues.
- The correct handling of sluicing will be fundamental to maintaining a good channel into Hayle.

- There are two day sailing patterns for average cruising yachts sailing from Hayle at spring tides, if the channel is well maintained. At neap tides the window is shorter. On shore winds hold water in the harbour and lengthen the window. Offshore winds shorten the window. High and Low weather systems affect the tidal window also. Assuming a yacht's draft to be 2m, the windows are;
  - a. Leave up to 2 ½ hours before High Water and return 2 ½ hours after High Water – gives a maximum of 5 hours at sea.
  - b. Leave 2 ½ hours before the first high water and return 2 ½ hours after the next high water – gives a maximum window of 17 hours ( or if returning 2 ½ hours before the following High Water a boat would be at sea for 11 hours at sea. Alternatively a boat could leave say 2 hours after one H.W. and return 2 ½ hours before the next H.W. – giving 7 hours at sea. Owners will need to be educated to plan sailing accordingly.

The sea state in the Bristol Channel can change very quickly and the “Ground Swell” can produce big seas very quickly with breaking seas on the bar. Less experienced boat owners will need educating to look out for this phenomenon and learn how to plan to cope with it

**Other Points for consideration;**

- There are 30 commercial boats, 90/100 leisure boats (currently producing only £6,000 of income to the non-property side of Hayle Harbour Ltd. The property side of the company receives the boat storage income (£20 pcm or part thereof)
- The harbour users are happy about the impounding of water in Penpool Creek, so long as they are relocated to somewhere acceptable.
- What size and weights are the commercial craft, and what may come later? The hoist should be able to cope with foreseeable demand.
- Full tidal and stream calculations are required for the marina area and for the impounded Penpool Creek
- Charges have not increased for a very long time. Boat owners have become used to unrealistically low charges for a long time.
- Gig/ Rowing Club users are only charged £1,000 for at least 50 members and at least 50 launches pa. This is unrealistically low.

### 3. Interview – Neill Clark – Harbour Master – Penzance

Penzance has three harbours, the main floating harbour, a commercial “drying Quay” and the leisure harbour with an active sailing club. Parking is less of a problem for Penzance, but it is still oversubscribed in the high season. The car park provides boat storage space in the winter months. A marina has been discussed on a regular basis but would be too costly because of the seawall costs, especially when there is no land to develop to offset the construction costs. The site discussed was from Battery Rocks to the Lighthouse at the entrance. Newlyn has looked at commercial expansion, but again funding could not be raised, it currently has 10/12 pontoons. Plans for a new marina at Penlee Quarry are still stalled but will probably happen in the near future.

#### **Penzance Harbour;**

- 10/12 yr waiting list for leisure craft. List closed.
- They get 60/ 70 calls per month for moorings
- There is a significant demand for live aboard spaces. Penzance has just a few.
  
- The floating dock is in big demand, but it is difficult trying to balance the differing needs. Scottish Heritage is causing operational difficulties in this area, which conflict with modern operational requirements.
- Commercially there is a mix of craft up to 200'. The majority of the fishing craft operate from Newlyn. A lot of commercial craft come to Penzance for maintenance
- There are 240 leisure boats using the harbour, with a comprehensive matrix of moorings. Of the 240, 40/50 boats are local boats.
- There is winter storage for 120 boats on the Car Park and 50 boats in the Sailing Club Compound
- Leisure sailing and dinghy racing is very popular in Cornwall.
- Fishing and Dolphin Watching boats work out of the Harbour and are in good demand
- The Harbour Master believes that prices are too low for leisure users, but that there needs to be a special local rate for local boat owners, because wages are so low in the area.
- The Council have 30/40 moorings for visiting boats

**Navigation/ Harbour issues;**

- The floating harbour is accessible 2hrs before and 1hr after HW. There is a significant charge for the opening of gates, split between the users. (£240.00)
- All the moorings are drying. Access 2.5hrs either side of HW for 2m draft.
- Hayle Marina would encourage leisure boating on both sides of the peninsula. The average time for the trip would be 4/5hrs, but a close eye needs to be kept on the weather which can change quickly from North to South. Planning trips to coincide with tides for egress and access is essential.
- The swells and short seas can make sailing quite difficult at times.

**4. Visits to Newquay Harbour, Watchet Harbour Marina and Portishead Quays Marina****Newquay Harbour**

Whilst not a major facility a short visit was paid to Newquay harbour to ascertain charges, usage and demand. It is a small but popular harbour with commercial, leisure, rowing gigs and sailing club users. No jet skis are allowed.

- There is a three year waiting list for commercial craft moorings and a 4yr waiting list for Leisure moorings.
- Private moorings cost £25-00 per month
- Trip boats pay £40-00 per month
- Commercial Craft pay £50-00 per month.
- Visiting fishing boats pay 11/2% of the catch as a landing fee.
- The harbour is only suitable for smaller yachts and leisure craft and has a very difficult entrance in heavy weather
- Access is very difficult by road and parking is very limited.



### **Watchet Harbour Marina**

Watchet Harbour was developed into a Marina as a joint venture between Dean and Dyball and the local council. It was recently sold to Coastal Leisure, who operate boat sales at Shamrock Quay and Ocean Village. They plan to develop it into a better quality concern and tackle some of the silting problems that still exist despite it being a tidal-sill basin. Watchet is about 40 minutes by road from Bristol and enjoys very easy access from main roads to the east.

- There are approximately 200 boats berthed in the marina, varying in size from 20' to 75'. It is notable however that the average size of craft was much bigger than in the drying harbours in Cornwall. The average size is approximately 10.5m, with a reasonable number of boats over 12m
- The harbour has a well constructed tidal “drop cill” and sluices, but despite this it was interesting to note that there was still a big problem with siltation. Unlike Hayle the marina does not seem to have a flow of water into the basin. It relies purely on managing the tide to sluice the mud out.
- Whilst of a very basic nature, the Marina has all the main facilities of Chandlery, Shower Block, Boat Repair and Boat Sales. It is located next to a very attractive village.
- A boat owner I spoke to said that there was a large demand for good marina berths and it was his opinion that people would purchase bigger and better boats to keep on the Bristol Channel if there were more marinas to visit over a larger area of the coast.
- The channel is very tidal and westerly tidal streams of up to 4.5kts can be experienced across the marina entrance. Access is only 1.5hrs either side of high water. A traffic light system is used to control traffic through the entrance.

### **Portishead Quays Marina**

Portishead Quays Marina is operated by Quay Marinas, who also operate Pemwarth Quays in South Wales. Quay Marinas is a relatively new group formed by a “Management Buy Out” of Crest Nicholson Marinas, they operate five marinas in their group.

Portishead Quays is a very attractive 400 berth modern marina located in the Port Marine Development area to the south of Bristol Docks. The area is the subject of a large regeneration scheme. The streetscape of the houses and flats to the west of the marina basin has some quite attractive elements (<http://www.portmarine.co.uk> ). Currently the marina sits in an area which is still under construction some areas of which are quite rough. It is therefore very interesting to note that not only is the Marina full, but the quality of the boats is very high.

- 400 berths, Modern Locked Access, excellent Shower, Laundry and Office facilities
- Large boat storage area serviced by 35 ton Hoist
- Full yard facilities through tenants and contractors for Boat Repairs, GRP repairs, Engine Servicing, Electronics and most required services

- 
- Boat Sales is housed in old converted building along with other office tenants quite a distance from the marina itself.
  - There is a comprehensive retail and leisure development within easy driving distance to the south.
  - Despite the area being untidy and muddy the quality of boats in Portishead is very high, with a mix of motor yachts and sailing craft rising into the £750,000 level. The average boat size is about 11/12m. It appears that lifestyle is a very important factor in the decision to keep a boat at Portishead Quays. Two customers who I spoke to were keen to point out that the sailing waters were not particularly good, but the development in the area of the marina is a big draw and will become even more important as the area is tidied up.
  - The harbour master and the two customers I spoke to saw the development of a marina at Hayle as a positive move. Quay Marinas felt that it would be a different customer who would use Hayle as the travel distance to the main areas of population is much further. They think that the typical user will be more of a “sailor” who will drive the greater distance in order to access better sailing waters quickly by boat. Generally it is easier and faster to drive to a marina and then access good sailing grounds by boat, which is naturally slower and less fuel efficient.
  - Portishead Quays is a good project to study for additional ideas on the development of Hayle and the interaction between the Marina and the other elements. I believe that Hayle could be a more complete development as the element locations are better balanced and its relationship to the town is more central.

### **Bristol Marina and Bristol Docks**

Bristol Marina is small mixed fully floating marina, with a bias towards the inland waterway network. It has 100 berths. It is quite an old development to a fairly low standard. Pricing is dictated by the low levels currently attained on the inland waterways where £120/m is perceived as expensive.

Other berthing is available on the Bristol Floating Dock network.

Whilst I visited the developments in Bristol I do not believe they are fully relevant in relation to the Hayle Harbour study.

## 5. Interview – Rob Lello - Hayle Harbour Users Group

There have been a number of owners of Hayle Harbour and at times the Harbour Management has been varied in its application to the problems at hand and the quality of the work carried out. Much work was left undone and because of this the Harbour and its' confines have fallen into disrepair. As a result of this the local boat owners felt that they needed to protect their best interests by forming a harbour users group. At times they have been a vociferous group and opinions vary on the benefits that have been accrued for the harbour itself. The interview was conducted with Rob Lello, chairman of the Users Group, to ascertain what levels of charging could be levied and what the Harbour users main concerns are.

### General Concerns & Issues;

- The Harbour Users Group consists of local boat owners and people using the harbour. There is also a Fisherman's Assoc, whose secretary is Peter Gay (0780 173663470). Both groups are concerned that they will continue enjoy uninterrupted use of their boats and reasonable rates as the harbour and the land around it is developed.
- The Users Group is made generally of low paid local people owning boats under 20' or so. These vessels are worth only a few thousand pounds. Many are retired or work only part-time and therefore ownerships costs are high on their agenda.
- There are approximately 80 small leisure boats in Hayle of which 40 are members of the group, they believe that they have been ignored in the past and may be again once the planning for the development goes through.
- They understand that the prices they are paying are low. Some want these very low charges to continue and they are happy with mud berths. Others are prepared to pay a little more for improved facilities. The proviso seems to be that they are not charged more than other leisure users in similar harbours using similar facilities.
- Many of the experienced users have expressed concerns about the dredging and sluicing proposals. They are concerned whether they will really result in a cleared channel and at what rates the currents will flow through various parts of the harbour. They think that removal of the cockle bank in its entirety could cause a number of problems. In particular they believe that without the bank there will be more siltation within the proposed marina area and that there will be insufficient flow to keep the channel wide enough just to the north of the proposed commercial harbour. The fishermen are sceptical about the benefits of the silt trap. They believe slowing down the flow at this point will cause a siltation tail after it.
- Concern was expressed that the Commercial Harbour area was too small and that in the future Hayle will have to turn away lucrative commercial business. The government is encouraging freight off of the road onto rail and the sea and this is seen by some as a chance to bring new employment to Hayle. If the harbours too small and the wrong areas compromised by residential or retail development a major opportunity could be missed. No evidence was given in support of this, although mention was made of fast ferries to Wales and Bristol.

- Many users have said that the car parking is too isolated for the marina and they think that this will lead to Marina boat owners leaving their cars in random positions causing problems for the commercial traffic in the harbour area.
- There are concerns about the ability of less experienced boat owners being able to navigate the bar safely.
- The small boat owners have expressed a preference for Penpool Creek to be impounded by the tidal flap at the 1/2 length, but if they were fairly relocated they would be happy to see the full impoundment.

**In Summary;**

- I did not discuss any of the politics with Rob Lello, but listened to his views, which he assures me are representative of the group.
- They all understand that there will be some increases in mooring costs, but some feel they cannot afford such an increase, while others feel they may pay more if they get more.
- Convenient car free car parking is a big issue with them.
- They believe that there are serious safety issues for the less experienced boat user coming into and out Hayle over the bar. They believe that it would be sensible to embark on a policy of education at an early stage.
- They are sceptical about the intentions of the developers and are concerned about a certain loss of freedom as the Harbour/ marina develops.
- All in all if their concerns are taken on board and considered then the majority of the members are in favour of the development.
- There is a degree of resistance to progress.
- They have asked what will happen to the management of Hayle Harbour when the development is complete. How will the whole Harbour be controlled when there will be so many diverse interests.

## 6. Interview – Stephen Bassett – Harbour Master – St Ives

Penwith District Council operates a number of Harbours and of these St Ives and Penzance were visited to establish the way the Council handle various harbour issues such as charges, demand, pwc's, local versus leisure demand for moorings etc.

### **St Ives Harbour:**

- 65 registered commercial boats including mackerel boats from Newlyn. Smallest is 18' Potter and the largest is a 33' working catamaran
- There are 6 x 12 person trip boats, often used for fishing
- Two companies operate small 4hp self drive open boats (total 20)
- Two adventure RIBS operate out of the harbour (9m, 10/12 seater)
- Commercial craft pay up to £400 per craft. Passenger craft pay mooring rate plus £180 levy.
- There are 65 leisure craft ranging from 10m to 4m. The average size is around 6.5m. Demand outstrips supply
- There are no yachts and the bulk of the leisure craft merely potter and fish. PWC's are not allowed.
- Additionally there are approximately 20 racing dinghies that are very active in the summer months
- The sea wall is actively used by commercial craft, but the walls is difficult for visiting yachts due to the long swell that is predominant in St Ives bay and because it must be kept generally clear for commercial craft.
- Visiting yachts are encouraged and come from the Scillies, Wales and further up the Bristol Channel. St Ives harbour keeps 5 visitors moorings (but these are drying berths).
- Visiting craft are generally 9.5 to 15m yachts, although there are more power craft evident in recent years.
- Any yachts need to be shoal draft or bilge keeled because all the moorings dry out.
- Access to St Ives is H/W +/- 2 1/2 hrs

**Navigation/ Harbour issues;**

- Tidal range is 21' at Springs
- Tidal Window is HW +/- 2.5hrs
- Fog can be common all year round
- The ground swell can cause big seas to form very quickly
- Local knowledge is very necessary for visiting harbours in North Cornwall
- It will be necessary to educate Hayle's customers in the subtleties of navigating the Bar at the entrance. This is a safety issue.
- Stephen Bassett suggests that Hayle Marina will be very popular, especially as parking and access will be very good. Parking and land space are at a premium in all the Harbours in the summer months.

PROJ 768 HAYLE MARINA STUDY



RGA Ltd  
7 Dean Bank Lane  
Edinburgh  
EH3 5BS

T: 0131 343 1115  
F: 0131 343 2273  
E: [info@rgaconsulting.co.uk](mailto:info@rgaconsulting.co.uk)  
W: [www.rgaconsulting.co.uk](http://www.rgaconsulting.co.uk)