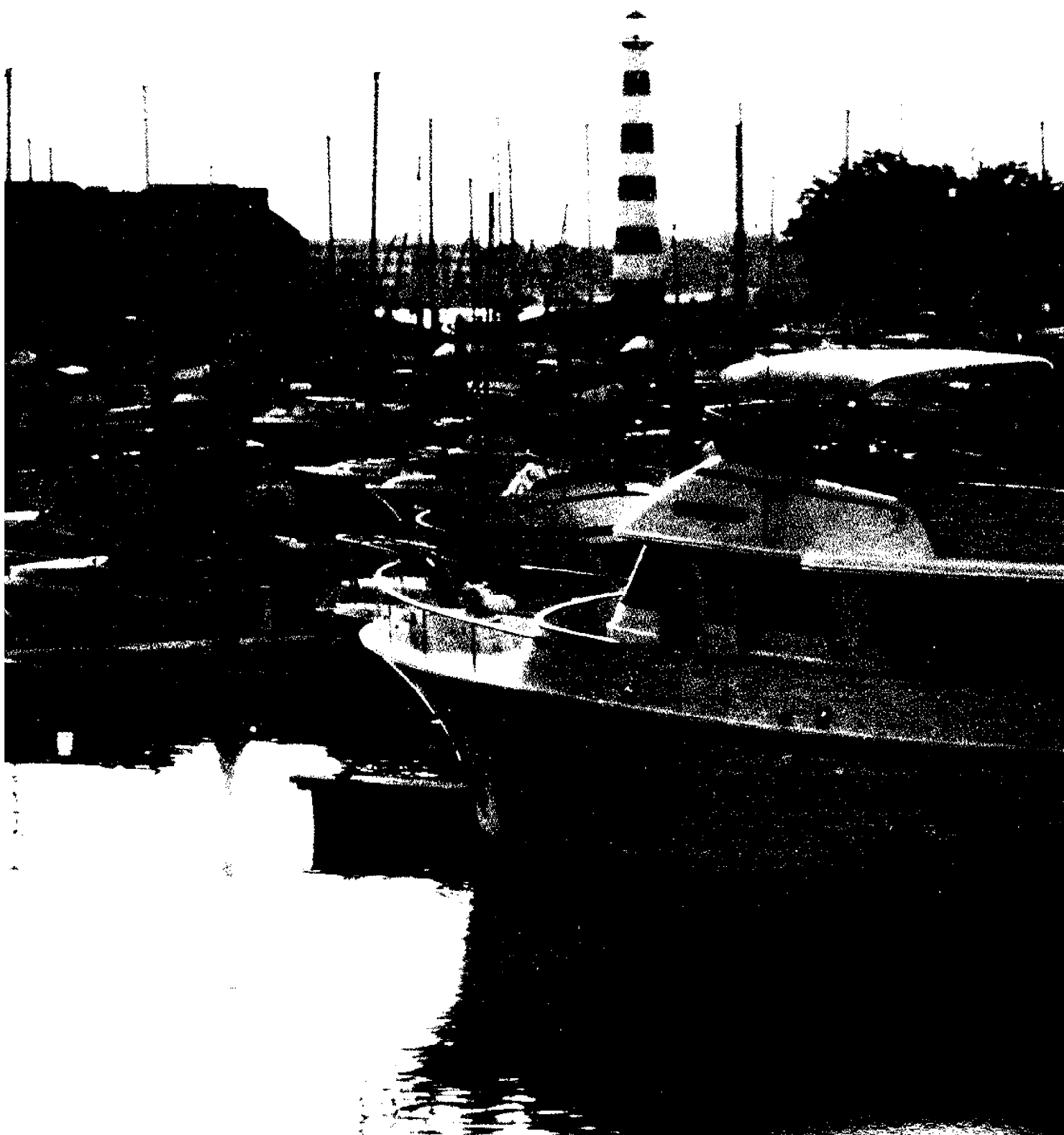
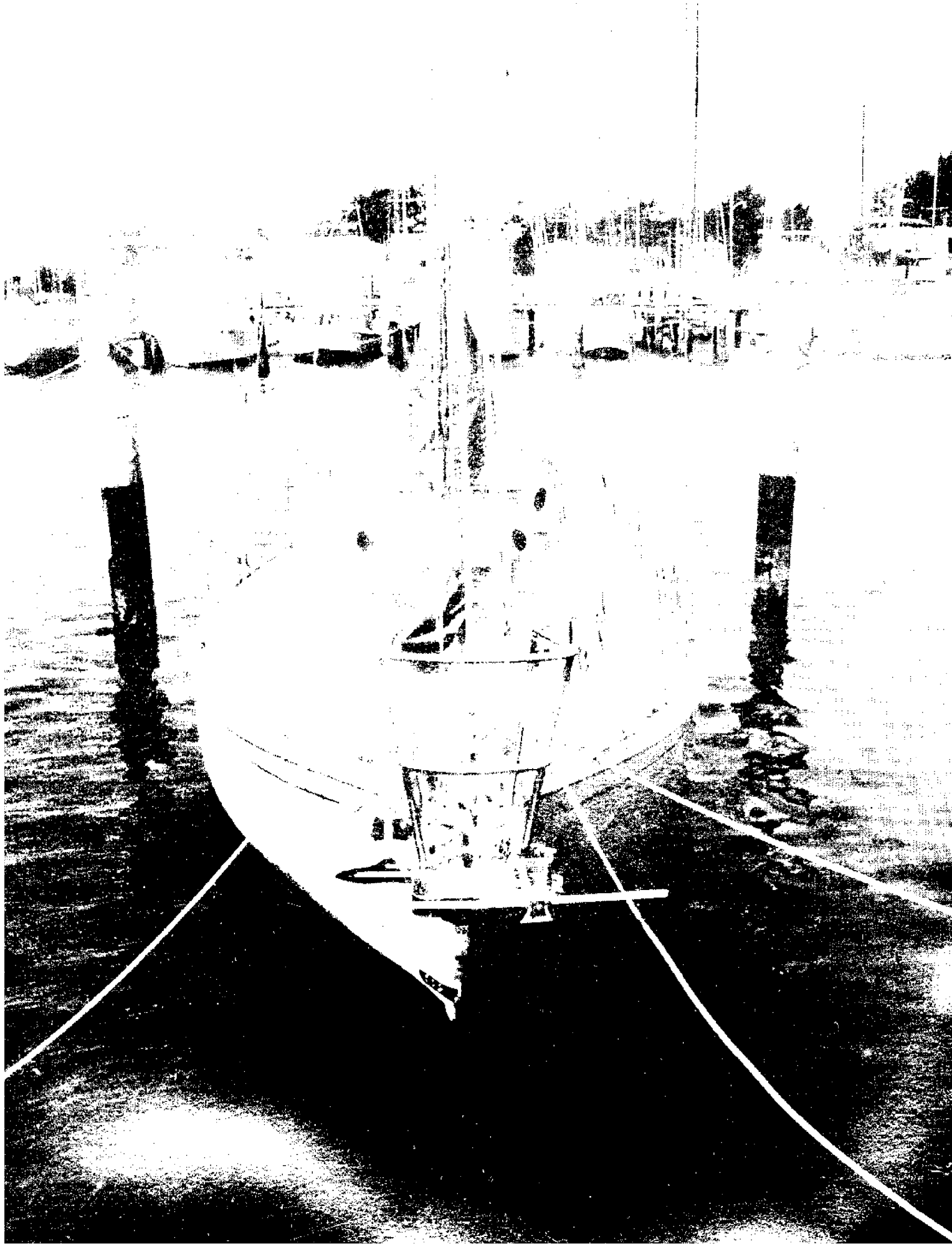


The future of the marina industry





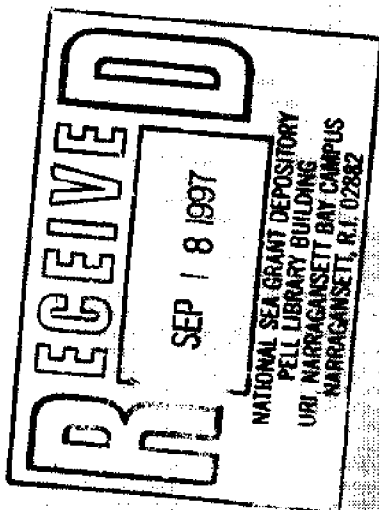
Critical Issues

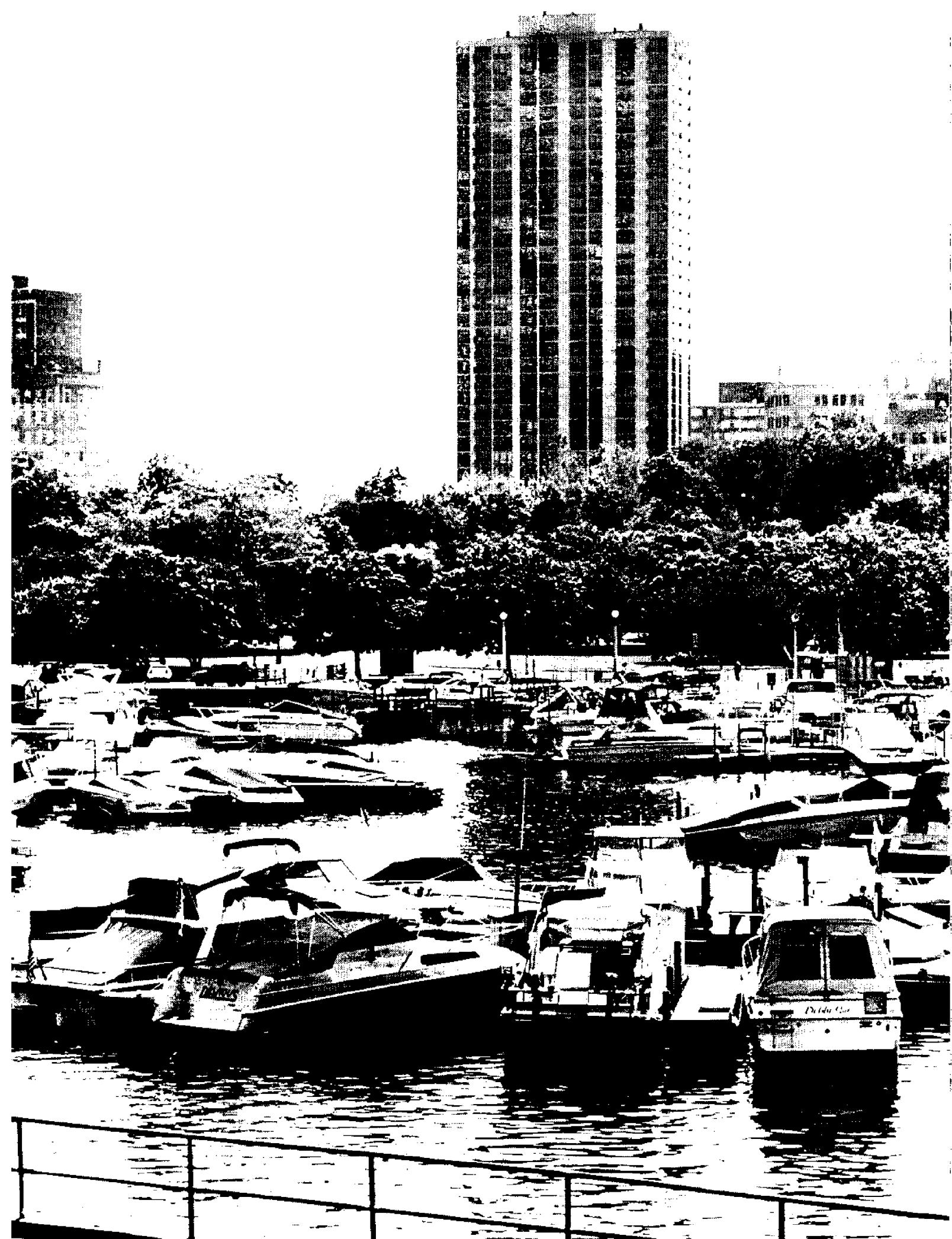
MarinaNet was established as a multistate network for marinas and marine trades through the National Sea Grant College Program. The network creates a system for the efficient exchange of information and experience between academia, the marina industry, regulatory agencies, and other marine-related organizations. The project has resulted in linkages between Sea Grant, the marine trades, major national and state marina associations and regulatory agencies.

The *MarinaNet* Research Collegium was convened in March 1997 to facilitate and enhance coordination within the marina industry, and to develop ideas for future research, outreach, and education projects. Eighty-three members of the marina industry — including marina operators, trade group representatives, manufacturers of marina products, consultants, federal and state agency representatives, non-profit organizations, and university Sea Grant researchers, education and outreach specialists — participated in the collegium.

Although the participants deliberated in independent focus groups, common critical issues emerged. These critical issues illuminate and highlight important, over-arching problems and opportunities for the marina industry as it moves into the 21st Century. These critical issues, in no particular order, include:

1. Developing and managing the industry's human resources.
2. Industry economic research and education issues.
3. Provide more information and training.
4. Changing boating demographics.
5. Raise awareness about marine industry value.
6. Boosting communication, cooperation, and ties.





DEVELOPING AND MANAGING THE INDUSTRY'S HUMAN RESOURCES

THE INDUSTRY NEEDS ACCESS TO POOLS OF TRAINED SPECIALISTS AND MECHANISMS CREATED FOR ECONOMICAL IN-SERVICE TRAINING OF EXISTING STAFF. CHANGING LABOR LAWS ARE CREATING DISINCENTIVES FOR SERVICE FIRM EMPLOYMENT. NEVERTHELESS THERE IS STILL A NEED FOR PROVIDING OUTSTANDING CUSTOMER SERVICES. NEW INFORMATION, EDUCATION AND STRATEGIES ARE NEEDED FOR THE INDUSTRY'S MANAGING IT'S MOST IMPORTANT ASSET—EFFECTIVE WORKERS.

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FOCUS: BUSINESS MANAGEMENT

Blend the Industry for Better Business Management

"The marina industry has begun to recognize the need to diversify its services in order to successfully compete for the recreational dollar, given changing clientele service needs, the industry's financial woes, and an urgent need for skilled and trained employees," observed Duncan Amos, Georgia Sea Grant. His statement reflects the ideas of many in the Business Management focus group at the MarinaNet Collegium. As the group grappled with the basic economic, regulatory, marketing, financial, risk and personnel management problems and opportunities, they repeatedly returned to the urgent need for industry cooperation. "The 11 participants in our group unanimously agreed that the industry must work and speak with one voice," said Mike Liffmann, group facilitator.

The focus group suggested that Sea Grant's university affiliation could provide some help. Data gathered through the case study approach could shed light on effective means for addressing technical training needs, organizational models, and assistance programs for small operators. Among the cooperative projects suggested was a job bank, perhaps on-line, to help managers find employees while giving vocational educators valuable information for curriculum development. A careful risk management study might make possible effective nationwide coverage. "Right now insurance coverage is in separate niches," said Ted Crosby of CIGNA Loss Control Services, Sunrise, Florida. Some in the group suggested that development of a standardized financial report structure could clarify the value of this industry to the national and local economies while providing those in the industry with an accurate yardstick to measure individual financial status and realistically set rates.

For long-range planning purposes, marina business managers need to take the broad view of the industry as a provider of experiences in the marine environment instead of the traditional approach of merely being a service provider for boaters. Such a view includes consideration of changing demographics, competition for the waterfront, modern management techniques, and environmental changes in devising operating plans, maintenance and marketing strategies.

In other words, integration, or as Doug Parsons of the City of Long Beach Marinas said, "A blending of the industry," is an essential strategic move for marina business management as it moves into the 21st century.

How Can We Understand the Economic Impact of the Marine Trades?

Everyone in the marine trades, at one time or another, seeks economic impact information. The participants in the Economic Impact focus group at the MarinaNet Collegium all responded the same way — "What do you really want to know and why do you want to know it?"

Economic impact can be defined for the marine trades in two different ways — as economic valuations based upon (1) intangibles like the enjoyment of boating, or (2) tangibles like the flow of marine-industry-based dollars through the entire economy. To gather data that would reveal something significant for either type of economic impact is difficult because of the broad range of people involved in the industry — from young to old, from manufacturer to user, from boater to water-skier, from a one-dock, gas-only marina to a multiservice marina associated with a resort or a park. Each of these groups identifies both tangibles and intangibles in different ways. Thus, economic analysis uses a variety of data and different methodologies. In the end, "economic impacts are uniquely local," said Dr. Lonnie Jones of Texas A&M University's Agricultural Economics Department.

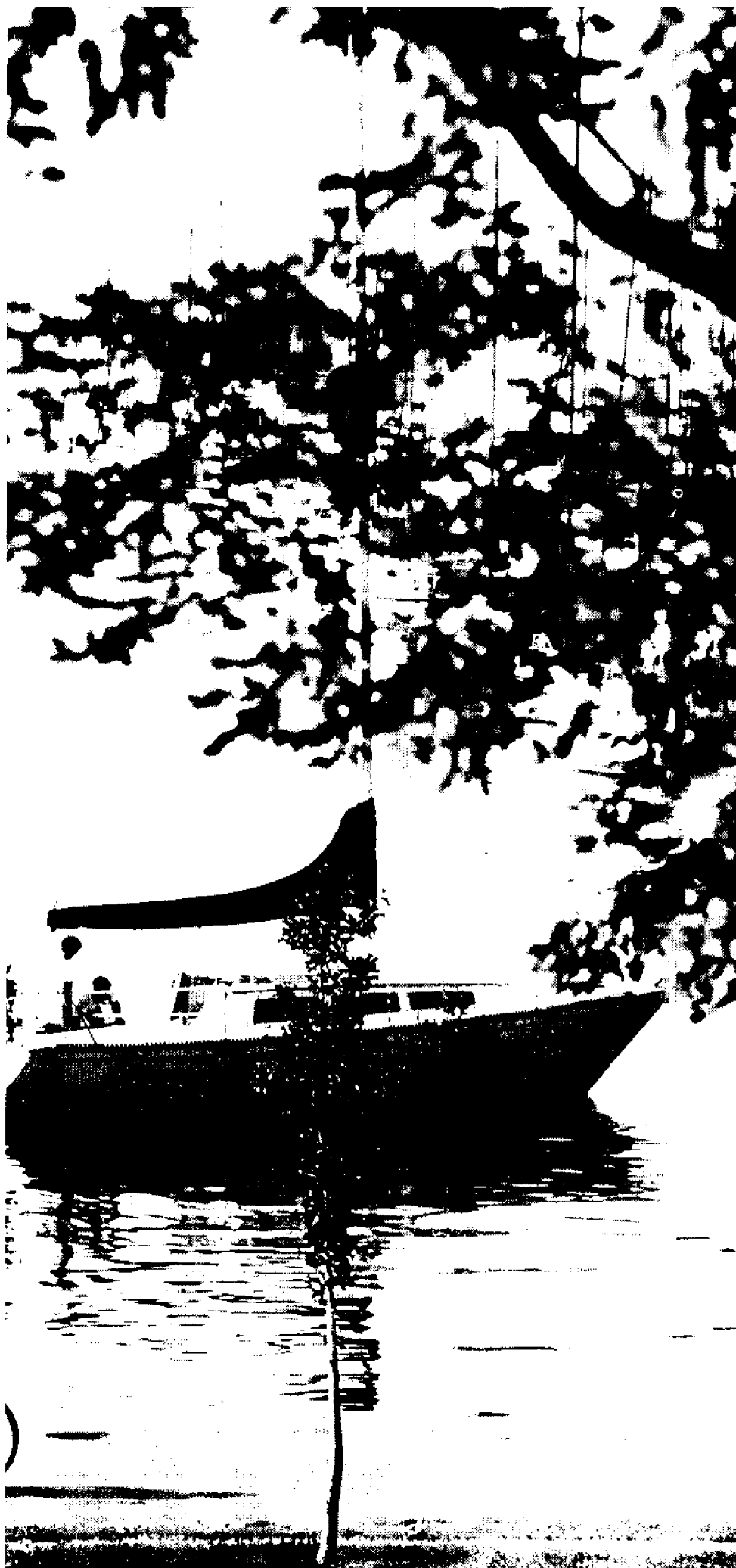
But timing may be right for some significant broad economic impact studies. The demands for use of the aquatic resource are increasing, leading individuals, business people, governments, and environmental/conservation groups to demand careful planning and development. Coastal zone management (CZM) planning requires many such studies looking at both types of economic impact as part of broader studies on the impact of change on the ecosystem, resources, etc. CZM decision-makers will need accurate analyses. The industry has an opportunity to join with others to pool resources for broad economic impact studies that can help both the marine industry and CZM committees. Related industries that also use the water — ranging from commercial fishing to tourism — have data related to their own interests which can provide insights to the marine trades. These groups may be interested in pooling resources for broad studies as well. At the same time, emerging technology like the Internet provides opportunities for all of these groups to access existing marine data generated for specific purposes which might reveal insights when examined holistically.

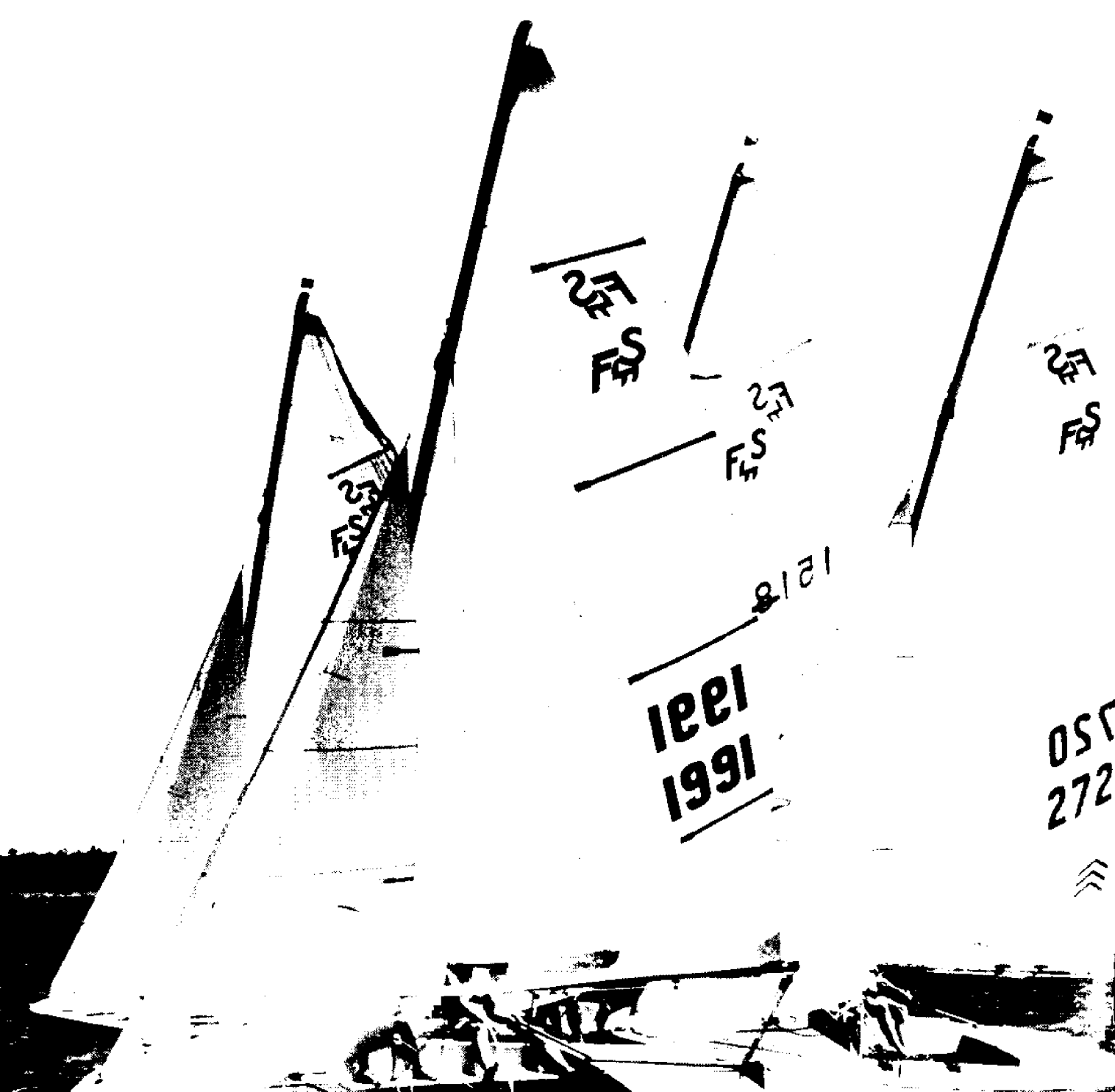
By looking beyond the scope of a specific question, pooling resources, and using some creativity in analysis, those in the marine trades may be able to broadly answer "What do you really want to know and why do you want to know it?"



INDUSTRY ECONOMIC RESEARCH AND EDUCATION ISSUES

STANDARD METHODOLOGIES FOR DETERMINING, QUANTIFYING AND ARTICULATING BOATING INDUSTRY ECONOMIC IMPACT AND VALUATION DATA NEED TO BE ESTABLISHED AT BOTH NATIONAL AND STATE LEVELS. EASY TO USE MECHANISMS ARE NEEDED FOR PROVIDING DECENTRALIZED ACCESS TO ECONOMIC IMPACT MODELS THAT ARE INTERACTIVE, QUICK AND LOW COST. IT IS DIFFICULT TO IDENTIFY AND TRACK SMALL RETAIL AND SERVICE ENTERPRISE GROWTH, TURNOVER, ETC.





PROVIDE MORE INFORMATION AND TRAINING

A REAL NEED IS PERCEIVED FOR GREATER EXPOSURE OF BOATERS TO OPPORTUNITIES FOR EDUCATION IN SAFE BOATING AND ENVIRONMENTAL RESPONSIBILITY PRACTICES AND FOR TRAINING MARINAS IN RISK MANAGEMENT. BOATERS NEED TO RECEIVE CRITICAL INFORMATION (I.E. SAFETY, WEATHER, ENVIRONMENTAL, PUMPOUT TIPS, ETC.) ON THE RAMP OR AT THE MARINA PRIOR TO GETTING UNDERWAY. GREATER USE OF EMERGING INFORMATION TECHNOLOGY BY INDUSTRY AND BOATERS IS NEEDED FOR PROVIDING TIMELY EDUCATION (I.E. INTERNET, WEB SITES, CABLE/WEB TV, ETC.).

Improving Boater Education is a Tough Lesson

"People think that taking a boat safety course is like going to the dentist," said Virgil Chambers of the National Safe Boating Council. "We need to change that perception."

"It's not only boating safety that needs to be addressed, but environmental education and responsibility," said Marion Clarke, Florida Sea Grant, and the group's facilitator. "The boater, the manufacturer, the marina operators and government agencies all have a role to play in advancing recreational boating. Just what that role is and who would provide the education were the topics for discussion in the Educational Issues focus group."

"We quickly identified some problem areas," stated Clarke. "For instance, there is an obvious lack of incentives for boater education, both for safety courses and environmental information. No license is required to operate a boat, so boaters often forego any type of safety training. Boaters often don't know about insurance discounts for participating in a safety course or that boaters who do take a safety course are less likely to be in an accident."

"Boaters can have a negative impact on the environment simply because they can't read a chart properly," said Chambers. "They need to understand that these actions affect everyone and are easily avoidable."

Group comments: "It is not only the boaters who require information. Marina operators need up-to-date information on changes within the industry and the laws regulating them. As a whole, the industry is making great strides to improve their facilities by providing pump-out stations, recycling oil, and using environmentally friendly building materials and construction methods. There needs to be an outlet for that type of information to be shared."

"Currently, a mix of agencies and private interests try to address these topics. However, there is an insufficient number of trainers and those numbers are declining," explained Daniel Maxim, USCG Auxiliary, New York.

"With these topics identified as problem areas, we set out to create opportunities," said Clarke. "We need to cultivate partnerships between government, industry and educational organizations who are involved with the varied marine interests. Information needs to be available from a variety of sources and on an on-going basis, not a one-shot type of thing. Marinas have a natural leadership role in education. Boaters should perceive the marinas as a 'pro shop' for instruction."

"We also need to look at the delivery method," suggested a participant. "There are effective methods for educating someone other than having them sit in a classroom. We need to take an inventory of the available material and how it is being disseminated. We can use the internet, cable TV, and video programs. We also need to remember that our target audiences differ in age, activity and type of craft being utilized."

"The final recommendation was to educate legislators and regulators on the economics of recreational boating," explained Tim Spice, Boating Education Coordinator for the Texas Parks and Wildlife Department. "Laws and regulations are passed which can strongly impact the industry. Often, there is not a lot of scientific information available on which to make those judgements."



Something Old and Something New

In recent years, the marine trades have been impacted by a variety of external forces that seem to intensify the problems of the marine trades. Besides the more obvious forces like environmental restrictions, regulatory and permitting processes, and uncertain dredging availability, marina operators and boat designers are faced with a clientele that is expanding in numbers and characteristics. The traditional broad range of boaters — wind surfers, sailors, power boaters — now compete on the water with hikers, bikers, birders, singles and families, in fact people of all ages and with a full range of skills and and some with disabilities. Essentially, more people want to do more things, more regulations are being applied, and the available access to lakes, rivers and the coasts is diminishing. "On top of all this, we in the marine trades are so scattered and fragmented that, even if we unified, we'd still have less impact than the sweet potato segment of the agricultural industry," said Bill Koebel of Waterfront Consultants Inc., Geneva, N.Y. "We can't continue to operate in the same way."

Participants in the Technology of Facilities and Services focus group at the MarinaNet Collegium decided that these impacts can be countered with something new and something old. New products can be used and marketed that reduce maintenance on boats and piers, reduce damage caused by increased traffic on lakes and shores, and encourage good safety awareness and practices both aboard and ashore. New electronic technology is effective in retail marketing as well as internal communication and education. Sharing new bio-compatible fuel, pump-outs or other waste removal services with clients helps everyone and the environment.

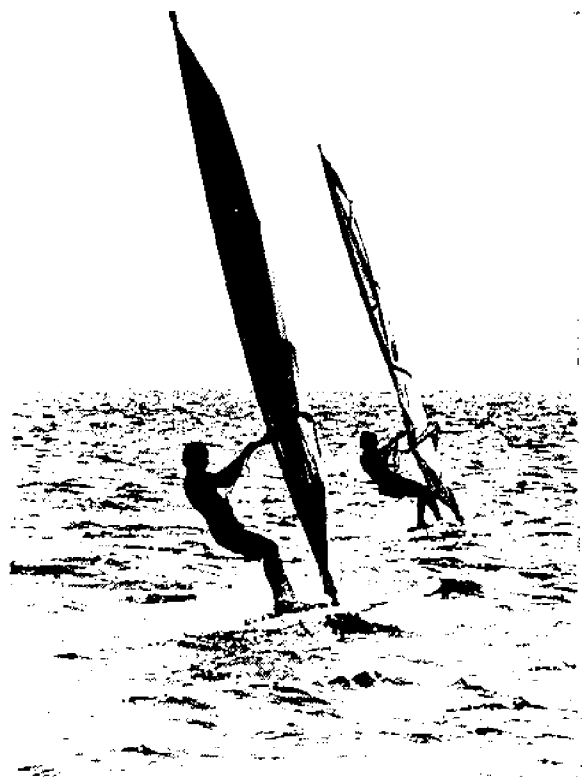
Other external forces can be countered by open communication between regulatory agencies, legislators, marine operators, boat builders, clients, and community leaders and by offering clients creative solutions like boat leasing or time-share ownership, dry land "berthing," or ergonomically and environmentally safe "shops" for do-it-yourself boat repairers and motor mechanics. In-house training and flexible hours can make employees happier and more effective.

These new technologies and services have little value without direct, convenient access to the aquatic environment. Thus, the long-standing needs for fuel, docks, dredged channels and boat lanes is essential; creative planning procedures like bluebelting must be widely implemented. Individual or concerted efforts to implement new technology (something new) and effective provision for access to the water (something old) can help the marine trades have a strong impact on outside forces.



CHANGING BOATING DEMOGRAPHICS

THE NATION'S CHANGING DEMOGRAPHICS AND ECONOMICS REQUIRES A MIND-SHIFT ON WHO CLIENT IS AND WHAT SHE WANTS. APPROACHES ARE NEEDED FOR MAINTAINING AND ENHANCING RELATIONSHIPS WITH EXISTING CLIENTELE WHILE ATTRACTING, NURTURING AND BUILDING LASTING RELATIONSHIPS WITH PROSPECTS FROM DIFFERENT BACKGROUNDS. A TRANSITION IS NEEDED ON THE BUSINESS WE'RE IN—AWAY FROM ONLY BOAT/HARDWARE SALES TOWARD PROVIDING A LIFESTYLE PLATFORM FOR FAMILY ORIENTED RECREATIONAL EXPERIENCES IN STIMULATING ENVIRONMENTAL SETTINGS.





RAISE AWARENESS ABOUT MARINA INDUSTRY VALUE

CONTINUE TO COLLECT, ORGANIZE AND DISSEMINATE INFORMATION ABOUT THE INDUSTRY'S VALUE AND IMPACT ON OUR ECONOMY, ENVIRONMENT, AND SUSTAINABLE USE OF OUR SHORELINES. USE THIS INFORMATION TO SUPPORT WISE DECISION MAKING ABOUT MARINA SITING, EXPANSION AND MANAGEMENT AND TO BUILD GENERAL AWARENESS ABOUT THE INDUSTRY AND ITS CONTRIBUTIONS. CLARIFY THE POSITIVE ROLE OF PUBLIC ACCESS PROVIDED BY THE MARINA INDUSTRY. DEVELOP A NATIONAL CAMPAIGN TO PROMOTE THE VALUE OF AND RECREATIONAL OPPORTUNITY OF BOATING.



Marina Industry Needs Change in Marketing Strategies

"A marketing plan should help you achieve your strategic plan," commented Ed Mahoney from Michigan State University, thus setting the tone for the Marketing focus group at the MarinaNet Collegium.

Facilitated by Thomas Dowling from Oregon State University's College of Business, this focus group first defined the current, or traditional, trends and practices in industry marketing. Then they explored alternative marketing approaches and practices required to revitalize the industry.

"The consensus was that the industry is definitely fragmented," said Dowling. "Each group has its own, but separate, identity." Manufacturers sell boats. Marina owners sell/lease slips. Equipment and services are purchased separately.

"Furthermore, these products and services are traditionally marketed to men with an income exceeding \$50,000. With this exclusive orientation, these traditional marketing plans created a separatist approach to boating."

Traditional marketing has targeted selling the product and not the boating experience. The emphasis has been on the technical aspects of boating. "Marketing efforts need to expand and get out of the fifties mode," declared Bill Anderson of Westrec Marinas. "People boat to relax, to spend time with their families and to spend time in the environment. Instead of portraying boating as an exclusive activity, it needs be promoted as an inclusive activity."

It's not only the boaters, but the general public, who share the perception of boating and its related services as an exclusive activity. The truth is that marinas are often perceived as being outside of the community or as serving a special group instead of being recognized as part of the overall community. "If you are not an advocate, you take what is given to you," explained Tinsley Preston of Marina Dock Age Magazine. "Marinas have made great strides in becoming environmentally responsible and providing services within the community, but they have done a poor job communicating that."

"Marinas serve the public interest by providing access to the water, sustaining the shorelines, being advocates of boating safety, and making an economic impact on the community through sales of food, fuel and services to boaters," stated Paul Dodson of the International Marina Institute. "They have a true stake in the community."

Another trend that merits examination is the target audience. Thus far, boats and the accompanying services are targeted to men in certain income ranges. "The shifts in demographics demand a shift in marketing trends," explains Dowling. "Women and minorities make up a big share of today's potential market. The increase in popularity of PWCs (personal watercraft) have made boating more affordable as well."

While it is the goal of any industry to reach new clients, retaining current customers keeps any industry successful. Today, perhaps more than ever, customer satisfaction hinges on the personal touch. "Our clients work in hi-tech environments and they boat to get away from it all," said Bill Anderson of Westrec Marinas. "When our customers get to the marina, they want the 'high-touch' experience. Getting away from it all doesn't mean losing the human factor."

"The discussions in this group strongly support a proactive marketing plan and a well funded and sustained marketing effort on the part of the industry," said Dowling. "The focus needs to shift to presenting the experience instead of the particulars, and to expanding the target audiences to include women and minorities. New approaches to attracting customers, such as having a national spokesperson, are paramount for continued growth within the industry."

Sound Management and Regulatory Practices can Promote Smooth Sailing for Boaters!

Discussing environmental and regulatory issues can be rather like dancing with an octopus; it's hard to tell who's leading. "This is not a topic with a finite list of possibilities," stated Dr. Gustavo Antonini, Florida Sea Grant Urban Water Specialist and focus group facilitator.

At first glance there seems to be a lot of confusion. Who are the good guys and who are the bad guys? Who is the ultimate authority? Do the regulations do any good? Are they based on facts or emotion?

However, after some general discussion, some overriding themes became apparent.

"People often have the perception that boating has a negative impact on the environment," said Ken Kubic, owner/operator of East Passage Yacht Club on Narragansett Bay. "I can't think of a group who is more environmentally friendly or who has a greater stake in the environment than recreational boaters. After all, the environment is the draw."

"This is the greatest burden but also the greatest opportunity," explained Antonini. "The marina industry needs to do a better job of refuting this negative perception with the scientific information that is already available and with future research. For instance, the industry can identify and prioritize sources of pollution to clarify boating impacts. While much of this information is already available, it still needs to be presented in plain language and dispersed through the mass media."

While the perception of boating rated the highest priority in issues to deal with, regulations came in a close second. "The point of having environmental regulations is to reduce pollution," said Margaret Podlich, of Boat/U.S. Clean Water Trust, "but they don't always work out that way."

Regulations are often inconsistent, confusing, conflicting and redundant. They may not be cost effective or achieve the intended goal and can result in adverse consequences to the environment. They may also reduce or prevent access to the water by the public.

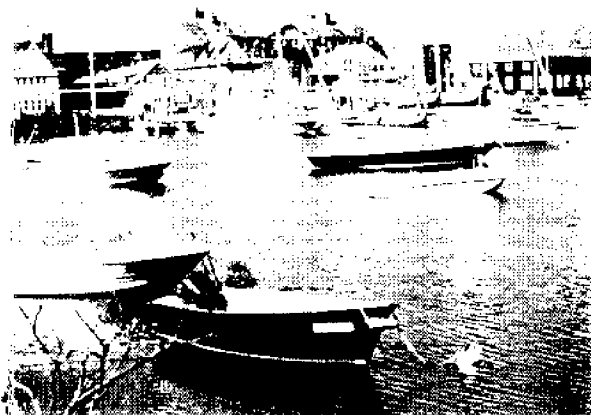
"Without a doubt, streamlining the overall regulatory process is a priority," explained Eric Olsson, Washington Sea Grant Oil Prevention Spill Specialist. "There needs to be a single lead agency designated which would ensure that various federal and local water quality, air quality, fire safety, etc., rules and regulations don't leave the boat or marina operator being confronted with a Catch-22 situation."

"Having a lead agency would also help to ensure that BMPs (Best Management Practices) could be developed," stated Antonini. "From these practices, research needs could be identified. In order to do this, state and federal legislators need to be informed about the needs within the marine industry."

These points naturally led to the need for 'working waterway management plans.' "Waterway conditions and boat-based recreational opportunities will decline without

BOOSTING COMMUNICATION, COOPERATION AND TIES

THE NATIONAL RECREATIONAL BOATING INDUSTRY IS COMPOSED OF NUMEROUS FRAGMENTED SECTORS WHICH LACK ADEQUATE MECHANISMS FOR COMMUNICATION. THIS IS EXACERBATED IN HAVING TO INTERFACE WITH MULTIPLE LAYERS OF GOVERNMENT. THIS REDUCES COOPERATION AND COLLABORATION BETWEEN VARIOUS SECTORS OF THE INDUSTRY AND INHIBITS ALL ENTITIES FROM LEARNING FROM ONE ANOTHER AND PARTICIPATING IN NATIONAL FORUMS. MECHANISMS SUCH AS THE MARINA NET COLLEGIUM CAN BRING INDUSTRY LEADERS TOGETHER TO PLAN FUTURE COOPERATION WITH UNIVERSITIES, WHILE HELPING THE INDUSTRY TO "SPEAK WITH ONE VOICE."



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comprehensive regional plans, policies and procedures," said Antonini. "We need to develop management plans to avoid conflict, competition, and resource depletion."

For instance, pollution problems are regionally diverse. "We need to promote a level playing field by regulating the pollution rather than the polluter," said Olsson. "There is currently a double standard with this issue. Furthermore, any management plan needs to address all the participants and we are missing a huge population by not addressing the needs of, and impacts by, trailerable boaters."

Sound management plans are based on scientific information which is available in one form or another but there is no clearing house for it. "Why reinvent the wheel?" asked Antonini.

However, no matter how sound the management plan nor how much progress is made in simplifying the regulatory process, none of it will do any good without active participation by the boaters themselves. They are the stakeholders and they need to expand and enhance their environmental stewardship efforts.

"The most powerful statement is when a law is changed in response to a community's actions, whether positive or negative," said Antonini. "It is the boating community's responsibility to apply peer pressure on itself to act responsibly. On the other hand, good sound boating and environmental practices can promote changes in laws that enhance the boating experience. Remember, a boater is a voter and there are 80 million of us."



Sea Grant Programs throughout the U.S. utilize university expertise in research, education, advisory services, and technology transfer to promote wise management and use of coastal and marine resources, working with coastal and marine audiences through direct interaction, publications, and other modes of communication. In keeping with this mission, the MarinaNet Research Collegium was convened by seven Sea Grant programs to facilitate and enhance coordination and understanding within the marine trades and the marina industry. This publication represents the ideas and concerns of the 83 participants. It was published by Louisiana Sea Grant College Program Communications Department and funded in part by NOAA grant NA45RG0096.

Single copies of this document are available from the Sea Grant MarinaNet representatives responsible for the Collegium.

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