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# MarinaNet Research Collegium



Conducted by the  
National Sea Grant MarinaNet Project  
Dallas/Ft. Worth, Texas  
March 6-7, 1997



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*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 to facilitate and enhance coordination and understanding within the marine trades and the marina industry. This publication represents a detailed proceedings of those deliberations written by the facilitators of each focus group, and published by the Louisiana Sea Grant College Program Communications Department. Seven Sea Grant programs collaboratively planned and convened the Collegium, funded in part by NOAA grant NA46RG0096.*

*Copies of these proceedings are available without cost from the Sea Grant MarinaNet representatives responsible for the Collegium.*

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## INTRODUCTION

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 goals of the MarinaNet project are to:

- Link individual Sea Grant programs with marine-related activities or projects into a national network to facilitate easy access to research, advisory and outreach activities and to make the network available to the marine industry, Sea Grant programs and regulatory agencies.
- Encourage marine personnel and their clients to use a proactive and economically sustainable approach to the aquatic environment.
- Serve as a conduit of research information between academia and the marine trades to encourage the emergence and application of best management and marketing practices, and to respond to the continuing demographic changes along the nation's coastline in a way that balances public and private access to coastal resources.

The MarinaNet Research Collegium was convened 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.

Over the course of two days, these participants worked in groups to define:

- Existing problems that are likely to grow in significance and magnitude during the next five years; and,
- Unrealized opportunities that exist today that are likely to grow in value and importance for the marina industry during the next five years.

Mark Amaral, Rhode Island Sea Grant, Co-Chair  
Bruce DeYoung, Oregon Sea Grant, Co-Chair

## **COLLEGIUM — CALL TO ACTION**

Although the groups worked independently, critical issues between the groups 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:

### **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.

### **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.).

### **Industry Economic and Research 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.

### **Raise Awareness About 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.

### **Develop and Manage 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.

### **Boost 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.”

## FOCUS GROUP REPORT—MARKETING ISSUES

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### Situation

The recreational boating industry must undertake a new and more strategic approach to marketing that is cooperative, continuous and designed to position the industry for future success. In order to initiate a new approach to marketing, many traditional and current approaches to marine and recreational boat marketing must be discarded. Exclusivity, limitations and fragmentation must be eliminated in favor of an inclusive, holistic and focused approach to marketing. This new approach must include recognition of and capitalization on expected changes in both the "demand" and "supply" of recreational boating experiences, products and services. Taking a new approach to marketing requires a careful review of the relevancy and cost-effectiveness of the existing approach. The table below compares traditional and current marketing to the recommended future approach necessary for sustained boating industry success.

TRADITIONAL/CURRENT APPROACH	NEEDED/RECOMMENDED APPROACH
Exclusive orientation: traditional definition of society, limited view of market potential, primarily white male oriented. A limited image of status.	Inclusive Orientation: include Hispanics, African-Americans, women, aged, families, disabled, others representative of demographic & socio-economic trends with white males. A universal, family-oriented image.
Promotion of products: focus on product sales, fragmented, technology oriented, high tech.	Promotion of boating experience: focus on cooperation, and relationship-based, high touch.
Customer as sales objective; target only product users. A harvest market (now mature)	Customer as a stakeholder: target all interests. Grow and retain market (always new potential)
Marketing viewed as cost. marketing is intuitive, intermittent, reactive.	Marketing viewed as investment: continuous, proactive/anticipatory.
<b>RESULT: Lack of focus, selling concept.</b>	<b>RESULT: Clear focus, marketing concept.</b>



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## **Marketing Approach for the Marine Industry**

The following five areas must be addressed to develop the recommended future approach. Each emphasis is explained here. Detailed information on related problems and opportunities for action in these areas is found in Appendix A.

### **Market Development and Retention**

Some sectors and companies comprising the U.S. boating industry treat the domestic market as a mature, saturated market where opportunities lie only in developing new products for existing boaters. Increasing emphasis and investment in the development of foreign markets results in further erosion of domestic market opportunities. Changing demographics and competition from other recreational opportunities has reduced the size of the market and boating activities in many regions of the country. Furthermore, potential boaters may perceive too many barriers to get involved in boating, such as total ownership costs and complex navigation skills required to operate a boat safely.

Alternatively, opportunities exist for developing new markets by attracting a population of diverse interested groups of people to the water. These opportunities can be developed by creating partnerships with industry stakeholders to overcome the real and perceived barriers that prevent people from enjoying the benefits of boating.

### **Marina Facility and Access Issues**

Developing increased interest in boating will in part be based on the adequacy of access to and enjoyment of public and private marina facilities. The industry must increase the flow of information about the attractiveness of the "boating experience" and the responsible environmental practices of marine and boating interests. The marine industry must strengthen programs that encourage cooperative stewardship of the environment and increase community pride in the availability and accessibility of marine and boating facilities.

### **Cooperative Marketing for Recreational Boating**

Initiating and sustaining partnerships within the boating industry will require cooperative interaction among key industry representatives. Identification and coordination of key industry stakeholder groups around a strategic framework based on common goals is a crucial first step. Increased communication, use of technology and media, and an increased flow of information among stakeholders are means to this end. The industry must agree on and support communication efforts that promote the boating experience in order to remain healthy and viable in future years. Market development and retention, as well as the viability of the industry, are dependent on favorably positioning boating as an accessible and enjoyable activity.

### **Institutional Marketing**

In order to coordinate efforts across the industry, boating needs to be defined as an American institution. The future success of recreational boating is very dependent on partnerships and working relationships with non-industry publics. These non-industry groups are critical stakeholders in that they influence (1) investments in boating infrastructure, (2) access to boating waters, boating education and enforcement, and (3) development of regulations that impact the industry. Toward that end, communication between industry representatives, legislators and regulatory agency representatives, and riparian interests must be expanded with an emphasis on avoiding and resolving problems.

Developing common objectives with public and private interests to advance boating as a fun, safe, environmentally responsible, and beneficial way of community life is essential.

**Marketing Information Development and Access**

Effective cooperative marketing of recreational boating will depend on continuous collection and exchange of information (e.g., market trends, economic impacts, marketing performance measures) among stakeholders. Toward that end, the industry should establish and make available clearinghouses of existing information. Industry organizations should partner with universities and government agencies to develop these clearinghouses. The industry should champion the use of consistent methods and models for developing, compiling and reporting new information about boating consumers, producers, products, facilities and infrastructures.

## **FOCUS GROUP REPORT—ECONOMIC IMPACT ISSUES**

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### **Situation**

Some of the most significant problems inhibiting the generation and application of useful economic data are conceptual. These conceptual hurdles must be overcome prior to addressing other issues such as methodological limitations. At the forefront of conceptual issues is differentiation between economic valuation and economic impact analysis. It is critical that end users understand these differences and the different applications of each. Economic impact analysis reflects the flows of money and compares the impacts of different alternative institutions or choices (e.g. benefit/cost analysis of different development scenarios). Economic valuation measures changes in the overall well being of society and is used to measure intangibles and non-market values (e.g. quality of life, enjoyment of boating, the value of a sunset).

The generation of different types of data requires the use of different methodologies. It is often not possible to answer questions regarding valuation with data generated to assess impacts or vice-versa. The end user must understand that limitations in data, funding and time all combine to limit economists' ability to provide definitive answers to the many questions affecting the marina industry.

End users should also bear in mind that the application of economic data cannot be removed from the political realities existing within society. It is important to consider how politics impacts the interpretation and application of economic data. Economists, as well as the end users, need to integrate economic analysis with social, political, fiscal and environmental factors in order to achieve the best possible results. One fundamental question that is often overlooked is, "Who and what constitute the marina industry?" Without a consistent and agreed upon definition of all elements that comprise the industry itself, we can hardly expect consistent research methods or results that can be generalized across study areas.

### **Problems**

#### **Methodological Techniques**

Once conceptual issues have been resolved, attention can be turned to methodological techniques. Improved methods need to measure intangible and non-market values. Accurate valuation of intangibles is central to precisely assessing the impacts of alternative development or management sce-

narios. Comparison of alternative scenarios often depend upon the accurate valuation of non-market resources. Also, information that does exist is not always freely exchanged. Sometimes this is due to the proprietary nature of the information; at other times the availability or location of information is not well known.

Social, political, fiscal and environmental factors differ from location to location. These differences are often compounded, if not overshadowed, by methodological differences. The difference between the methods used to gather data vary widely, as does the nature of the resulting data. For example, inconsistencies in definitions of spending categories, market segments, or multipliers may exist regionally, or even in the same community, institution or business. A uniform survey methodology does not exist, further limiting the ability to compare results across regions or from study to study.

It is important to develop methodologies that facilitate differentiation between national or regional trends and shifts across regions. Studies do not adequately differentiate between the introduction of new dollars to a region and redistribution of existing dollars within the region. Decision makers need to better differentiate growth in a particular sector from a shift in dollars from one sector to other competing market sectors.

End users need to better understand the information they are using to make their decisions. Local decision makers often use data which is too broad in scope to ensure quality local level decisions. The use of state level data may lead to poorly drawn conclusions about the viability of municipal level initiatives, resulting in unnecessarily high failure rates.

#### Quality of Data

Some of the limitations in data reflect a lack of qualified researchers who are close enough to the industry. Good quality data regarding direct economic impacts of business decisions are often hard to obtain since much is proprietary in nature. Small retail and service businesses, difficult to identify, may inadvertently be excluded from analysis. Inconsistent data and measurement, poorly documented spending data, inconsistent standards and peer review negatively impact the quality of the economic data which is currently available.

#### Stakeholder Buy-In or Acceptance

An equally important concern is the acceptance of economic information. Legislators and decision makers in general are reluctant to accept multipliers. This is partially reflective of the gap in conceptual knowledge referred to earlier and the limited communication between researchers and the boating industry. Furthermore, business owners do not always appreciate the value of participating in studies. This industry problem impacts both the availability and reliability of economic data.

#### Funding

Funding for economic impact studies is difficult to obtain. A long term funding commitment, originating within industry, is sorely needed. Inadequate and inconsistent funding adversely affects the quality, comprehensiveness and methodological consistency of economic studies. Broadening the base of financial support will improve cross-study comparison and also address the perception of researcher bias occasionally occurring with industry-sponsored studies.

### Communication and Information

The dissemination of study results needs to be improved. Researchers can improve their efficiency by building upon the previous efforts of others, but they need to know what has previously been done and where the data and results can be obtained.

## **Opportunities**

### Planning and Policy

Many of the problems facing economic researchers can be turned into opportunities. Within the realm of planning and policy, researchers can determine the impacts and value of alternative coastal uses (e.g. condos, marinas, single family homes, natural processes), and evaluate policies and regulations which may affect the location, retention, and/or growth of the marina industry. Researchers help communities make better local waterfront decisions by conducting appropriate studies to assess the demands for local services and the impacts on local government budgets.

There is a need for regional studies focusing on boater demand as a function of cost, water quality, fisheries, congestion and public access. Appropriate studies will assist in developing and cementing the linkages between boating and the rest of the economy. Economic impact studies enhance decision-making for marina siting, development and expansion, as well as promote the idea that commercial marinas provide necessary public access. These studies support "bluebelting" (using economic incentives or protective zoning to preserve waterfront property for marinas, boatyards, boat access, or other recreational water-dependent uses) and can be utilized to support coastal zone management and land use-planning, encouraging business enterprise.

### Partnerships

Some of the most exciting and promising opportunities lie in the area of partnerships. Partnership opportunities include, but are not limited to, areas of tourism, fisheries, community development and environmental protection. There is a promising opportunity to bring together coalitions of stakeholders to voice the importance of integrating economic analysis in watershed, water body and land use planning decisions.

Improved outreach can help stakeholders understand the use and application of economic data and studies. Pooled funding with marine trades, states, citizens' groups, the scientific community and federal agencies will provide more resources and increases the credibility of the resulting findings. An industry "check-off" program may be helpful in providing funding for generic industry promotion and research.

### Profiling the Industry

Developing an industry profile can assist in projecting future boater demands and infrastructure needs. Promoting the use of industry-specific financial data will aid future research efforts. Establishing a baseline industry profile for marine trades can guide research and improve methodological consistency. Such a profile would have to be updated periodically at the state and county level, but would provide an excellent means to track industry trends. Trend data needs to be expanded to track industry performance in relation to competing recreational activities.

**Technology**

Technological advances provide additional opportunities to marina-related industries. The World Wide Web (www) can be utilized to collect and disseminate research products in much the way MarinaNet currently operates. New environmental technologies demonstrate the opportunity to increase the benefits and lower the costs of boating. It is not necessary to reinvent the wheel; reliable methods for economic modeling exist. Utilization of ever-expanding information technologies can assist in their application.

## **FOCUS GROUP REPORT—TECHNOLOGY OF FACILITIES & SERVICES ISSUES**

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### **Situation**

Marinas and boating access sites can use new technology and communication tools to enhance the economic benefits of their facilities and control environmental impacts. These technologies can be used to promote the marina industry and the marine facilities, and expand the customer base by creating multiple user-based, friendly, cost-effective and attractive facilities that can enhance the quality of the waterfront.

Marinas and access facilities need to anticipate the design demands of emerging technologies and investigate the use of new materials and techniques in relation to reducing costs, increasing revenues and maximizing the utilization of the facility. Scientifically sound data should be used to select emerging (and presently available) technology to control environmental impacts.

The marina industry needs to take the lead in developing and identifying techniques for cost-effective compliance with environmental regulations in facility design and operations. The lack of inter-agency consistency in regulation and definitions, plus current construction opportunities, gird the importance of a cooperative marina industry-regulatory community effort to streamline the regulatory process into a timely, and scientifically-based one. It is also critical to note that the future of the marina industry depends on regular dredging of waterways and boat lanes, and on regulations that permit safe and economical disposal of the dredge material.

In total, the industry should communicate data and information on the environmental and economic impacts of boating and marine facilities to facilitate networking, cooperation, problem solving, education, and promotion of the marine industry.

### **Problems**

Several of the following problem areas were identified through the collegium process. These include environmental compliance, design/engineering considerations for new construction and retrofits, the regulatory and permitting process, design/engineering considerations for maintenance activities, carrying capacity, dredging, and communications.

The following opportunities were identified to address these problem areas with the use of new or emerging technology.

## **Opportunities**

### **New Technologies**

Emerging (and presently available) technology should be used in designing and retrofitting facilities to increase longevity, control environmental impacts, and attract new customers. New types of recreational water craft should be accommodated, and new access opportunities such as dry stack storage, dry land storage and others can increase a marina's capacity. The design of facilities should be done with the use of CAD and GIS systems, and designs should be flexible and economically feasible. Techniques need to be identified to allow the "do-it-yourself" marina to continue. Expanded use of facilities can be gained by implementing customer specific technology (i.e., chair lifts for the disabled, facilities for kids, etc.).

Many new materials and methods are available (or being developed) for marina facilities, including: flotation devices, improved docks, hardware and accessories. New methods for preserving timbers and piles, the application of composite materials, and plastic tubing to shield treated wood are also available. New techniques and design methods for littoral transport and development for new sites are also available for use in siting marina facilities. Solid waste management should be investigated as a possible profit center, using recycling/waste separation to reduce costs. New methods for winterizing, de-icing, and protecting facilities while allowing for public access to the water need to be implemented, and investigation of alternative energy sources need to be continued.

### **Quantifiable Research**

With many regulations based on misperceptions or misinformation regarding the marina industry, research needs to be done to quantify and communicate the impacts of marinas vs. the benefits they provide. Research should be focused on sound scientific investigation and should work to correct misperceptions. Scientific investigation, not anecdotal incidents, should drive the need for regulatory requirements. Research should also be focused on the development of techniques to quantify carrying capacity.

### **Communication**

The exchange of information can be enhanced by using technology such as the Internet, World Wide Web and networking among those involved in the marine industry. While lobbying and advertising efforts need to be undertaken to enhance education of the industry and those regulating and utilizing the services provided, there needs to be open communication and cooperation between facility owners, operators, boaters, boat manufacturers and facility providers. A united effort needs to be organized by all marina-related groups to work for regulations that are economically and environmentally effective.

### **Dredging**

The future of the marina industry is dependent on regular dredging and safe and economical disposal of the dredge material. The upland placement of dredge material for beneficial use and its potential as a profit source for waterfront facilities needs to be investigated. New technologies should be



developed and used to develop innovative dredge techniques, establish sediment testing protocols, as well as to create cooperative ventures to share dredge responsibilities.

#### **Increase Boater Demand**

New generations of boaters should be encouraged to join the sport of boating. This can be accomplished by encouraging boat leasing, time-sharing, focusing on new market groups (i.e., senior citizens, youth, personal water craft users, sailboarders, etc.), and by designing to allow different types of boaters to utilize marine facilities. Opening up new markets and designing both the recreational facility and the recreational experience will enhance boat ownership and usage.

#### **Increase Community Support**

Marinas can capture a greater percentage of the recreational dollar by developing water-related facilities and activities that provide for leisure and quality family time, while targeting and building new constituencies. Full service marinas and related amenities can respond to new leisure demands and be a focal point for education. Marinas should improve their public image by promoting themselves as "green marinas" and should communicate new efforts in safety, technology, pollution prevention, etc. The general public should be identified as a new market opportunity for increasing community awareness and support.

#### **Boat Design**

Emerging and new technologies in boat design and operation will impact boating and marine services. The use of bio-diesel fuel, collection of vented fuel at fuel docks (for resale), the application of anti-collision technology, and the oxygenation of boat holding tank waste to speed decomposition are just a few of these technologies.

#### **Staff Training**

Staff training on many levels will need to be conducted to implement new and emerging technologies and to generate the new revenues needed to fund change. Trade associations should provide leadership in the development of training programs. Facility-specific staff training should be designed to increase revenues and reduce costs, while enhancing the knowledge of new technology as it becomes available. The development of an interactive computer application program that would allow marina personnel to access applicable regulations and laws and operation procedures is needed.

## **FOCUS GROUP REPORT—BUSINESS MANAGEMENT ISSUES**

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Mr. Jim Frye	Mr. Doug Ververs
Sonoma International	Cornell Cooperative Extension
Mr. Marshall Funk	
Pier 121 Marina	

### **Situation**

Nationally, the marina industry continues to be primarily comprised of small businesses, where 45 percent have no more than 50 slips. These owners and operators, along with those of larger private and public marina enterprises, are constantly trying to keep up with the increasingly demanding managerial requirements of a rapidly changing industry. The traditional marina management and operational problems—personnel, legal, insurance, taxation, asset management, credit, financial management—are being compounded by a pressing need to diversify the types of activities and services that are provided on these properties, while dealing with corporate consolidation and a trend toward integration.

The participants were unanimous in their assessment that, in order for the marina of the future to be successful, these enterprises must devise strategies that make them more than a place to park and service a boat. Much of this is being driven by changing demographics and new clientele service needs, and consumers' demand for "more experiences in the marine environment," in addition to traditional boat storage, launching, and repair services. In order to compete for the recreational dollar, marinas must become significant, multipurpose waterfront recreational centers. They will have to diversify and provide a greater variety of other recreational amenities (e.g., swimming pools, bowling alleys, miniature golf, movies, fishing piers, etc.) to boaters, non-boaters and their families. The modern marina complex will necessarily include retail and service establishments such as gift shops, lodging, restaurants, fuel stations, etc.

The participants concluded that this dynamic situation needs to be addressed on two fronts. First, it needs to be reflected in individual marina management, marketing, operations and maintenance strategies and plans, and second, in industry cooperation. The proverbial plethora of current issues and impending changes need to be confronted and addressed by a proactive, unified industry.

## **Problems**

The participants were asked for their views concerning the following question, designed to elicit views regarding primary problems: "What existing business management problems are likely to grow in the next five years?". They then brainstormed, discussed, clustered/grouped their responses, and ultimately identified 76 distinct problems as 15 like-problem clusters. In descending order of priority the clusters are: regulation, planning, pricing, financing, private vs. public, personnel, education, customer service, security, public relations, insurance, legal climate, government relations, and taxation.

### **Regulation**

The marina industry remains concerned about the expanding regulatory environment, the impact (including liabilities) of federal, state, and local regulations, and the costs associated with compliance. A particularly large concern is the apparent never-ending issue of regulatory limits on services, (e.g. in/out of water, bottom-cleaning procedures). Because they must also comply with international treaties (MARPOL), marinas fear additional government intervention.

### **Planning**

Planning for future facilities and the development of long-range strategies, essential for the marina industry, is not a widespread practice. There is an overall aging of the facilities, and many have deferred maintenance and facilities-planning until it can be afforded. Future planning efforts will have to take into account shifting demographics, and the increased risk exposure associated with adverse weather and the global warming trend. Public marinas are experiencing similar problems, along with considering privatization and other ways for dealing with costs associated with depreciation, capital replacement, maintenance, etc.

### **Pricing**

Pricing of multiple operations to support exposure and liabilities continues to be a difficulty for most of the industry. Pass-through facilities, in particular, obtain very little if any financial benefit, yet incur in costs. Questions abound regarding how to cost-out services such as rental space, dockage, and items such as insurance. Marinas with recreational and commercial operations on their properties are interested in information concerning the optimal mix of the two categories.

### **Financing**

Not surprisingly, financing from traditional sources to fund development and redevelopment remains a problem for the industry as a whole. Comparable financial data measuring performance, necessary to secure financing, is difficult to obtain. Lenders/financiers' views of risk in the marina industry are not clear to the industry.

### **Private vs. Public**

The private vs. public marina debate remains as a very thorny issue. Private operators, in particular, are concerned over competing with public marinas and advocate the removal of subsidies, which they feel are unfair.

### **Personnel**

It is difficult to balance the urgent need for qualified personnel, especially in marine trades and boat repairs, with the increasing liability resulting from changing labor laws of employing large numbers

of people in service businesses. To employ more professional and experienced personnel, means must be devised to maintain personnel continuity through promotion, remuneration, and continuing education of good employees.

#### Education

There is an overall lack of "industry knowledge" or education concerning competition from other recreational industries. The perception in many recreational circles that the marina industry is a "declining industry" needs to be reversed.

#### Customer Service

The industry needs to devote more effort to customer service. The results of the recent NMMA survey of customer service needs and its implications for marinas should be carefully analyzed for possible actions. Marina management is having to respond to more demanding customers.

#### Professionalism/Ownership

The smaller and older marinas are having to face the transition from traditional family management and customer-relation techniques to more professional approaches to business management. The transition is accompanied with the challenge of having to evaluate continued family ownership options through an inter-generational transfer or sale of the facility.

#### Security & Public Relations

There remains an ongoing concern over issues such as security and public relations. On security matters, the issue is how to insure security without compromising public access or public rights. Marina operators continue to be frustrated over the tarnished image of the industry within the media and seek to find ways to "convert a negative press into a positive one."

#### Insurance

The rising cost of insurance to cover facilities, personnel, and vessels is driven, in part, by environmental as well as civil liabilities. At the same time, the availability of insurance coverage for both property and liability purposes is declining. Along these same lines, the legal climate continues to be a burden for the marina industry, particularly in terms of asset protection, unreasonable legal exposure, and court appearances.

#### Government Relations

Although the industry has been working diligently at improving governmental support and relations, there is still ample room for improvement, particularly with federal interests such as the Corps of Engineers and Bureau of Reclamation, over contentious topics such as short term and costly leases.

#### Taxation

Although a great deal of discussion centered on taxation, it received a fairly low priority rating. The most frequently mentioned taxation subjects were: state governments increasing the declaration of ownership of submerged lands because it can lead to lease fees; the significance of "blue belting" trends (preserving waterfront properties for water-dependent uses) on personal and property taxes; the disbursement and use of dedicated taxes; and the "government's need to continue generation of ever-increasing sources of revenue by targeting "luxury" items such as recreational boats.

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## **Opportunities**

Once the discussion concerning problems was completed, the participants focused attention on opportunities for the marina industry. They were asked to respond to the question: "What unrealized opportunities exist today that are likely to grow in value and importance for the marina industry during the next five years?". Fifty five responses were received and clustered in 10 categories. In descending order of priority, they are: integration, consolidation, marketing, industry cooperation, education, reducing risks, training, growth opportunities, privatization, and operations planning.

### **Integration**

The single biggest opportunity is integration — how to diversify, to link marinas and other recreational activities. Vertical integration is a distinct opportunity given the typical marina's strategic location along the waterfront, its competition from other providers of recreational services, and the need to be better integrated with community needs. In general, marinas must strive to develop and respond to new market opportunities, new approaches for providing marine services, new technologies, and look into the development of full-service marinas. Part of the integration process will entail devising reinvestment and upgrade strategies which should include consideration of a changed asset mix to meet customer needs while increasing marina revenue and profits. Consolidation through acquisitions and mergers could result in economies of scale for the operators.

### **Marketing**

Although marketing was the topic of another focus group, the Business Management group felt strongly that this topic is a distinct opportunity. They felt that recent change in the recognition of the value of leisure time endeavors, and a healthy return to family values/family time activities presents a real marketing opportunity for the industry as a whole, particularly when one considers migration trends and the fact that some states have become the focus of extensive boating and marina activities. In addition, a good public image for marinas and boating will add positive exposure and serve as an advertisement for the industry. Positive changes in the overall perception of travel and tourism, when coupled with the recent improvements in water quality, should provide new opportunities and recognition for marinas and boating.

### **Industry Cooperation**

Industry cooperation is essential and part of this entails supporting all organizations that have specialized in responding to the marine industry's needs. Since risk and insurance coverage is such a significant concern, a marina association should be formed to help package plans for insurance coverage. Another opportunity, and one closely related to marketing, is an industry effort to expand the meaning of a full service marina in the eyes of the boating public.

### **Education**

Business management education is an excellent opportunity to train marina operators concerning many of the topics cited above, particularly diversification and integration. Training in costs and pricing would benefit public marina operators while helping to reduce public vs. private conflicts. Small business development centers at state universities and the consulting community could provide training on standardized marina financial reporting practices — helping the industry and attracting financial investors at the same time. Also, equipment manufacturers and retailers need to obtain a more complete understanding of the "boating experience", and consumers need to be educated on the value of boating as a recreational alternative. Government entities, notably cities,

counties, and states, need to learn about the impact of marinas and recreational boating, and perhaps much of this type of information can be made accessible by the industry and Sea Grant using the Internet. It is possible that such education will ultimately give the marinas a greater voice in the overall marine industry.

#### **Risk Management**

Reducing risks and risk management are both problems and opportunities. Reducing risks lowers insurance claims and subsequently, costs. Marinas need to eliminate exposures that are too great to insure or retain, and transfer risk by understanding exposures and identifying ways to protect from liability. For instance, properties from different areas may be pooled to reduce risk (insurance). Establishing a long-term relationship with reputable insurance carriers will benefit the industry. At times, maritime arbitration and mediation may help in risk management.

#### **Training**

The traditional "school of hard knocks" for personnel can be replaced by a more institutional approach. Managers, for example, can be trained in personnel management to facilitate attracting, training, and retaining quality employees.

#### **Growth Opportunities**

The marina industry has some distinct growth opportunities stemming from many of the issues discussed earlier such as changing demographics and clientele demands. But growth will also be limited by the amount of available waterfront land and access to water. Clearly, existing marinas and other boating facilities are in a favorable position to capture the lion's share of any anticipated growth as long as they respond to market and technological changes. For example, marinas should accommodate and recruit the latest, entry-level access group, personal watercraft users.

#### **Privatization**

A diversity of approaches to privatization of public marinas provide an opportunity for revenue enhancement for public marinas via rate changes. Privatization is also an opportunity for unity within the industry.

#### **Operations Planning**

Operations planning can help reduce property and liability exposures. For example, when a marina drafts, practices, and implements disaster contingency plans, it protects property, clientele, and personnel while satisfying public and regulatory concerns.

### **Suggested Actions**

The Business Management Focus Group reviewed the problems and opportunities, and carefully considered the comments of the collegium's other participants before highlighting seven topics for immediate and near-term action. In several instances, the group felt that Sea Grant's university affiliation could provide valuable assistance to the marina industry, while furthering its own research and outreach missions. Mr. Jim Frye articulated the following priority actions on behalf of the group at the conclusion of the event.

#### **Regulatory Issues**

Sea Grant should continue to serve as a facilitator and provide information, education and research support for the industry, especially in regulatory matters dealing with economics and the environ-

ment. For instance, economic impact and cost/benefit information should be made more "user-friendly" and Sea Grant researchers should look into the impacts of regulations on the industry (e.g. manatees and speed zones, financial implications and numbers of visitors).

#### Training/Personnel

Technical training for marina personnel is needed. Sea Grant can help this along by identifying state and international vocational-technical programs and curricula that relate to the marine industries (e.g. Maine Maritime, UNC-Wilmington, etc.). Sea Grant and MOAA might also collaborate and look into the possibility of an industry-wide job bank. Another important action is one proposed for the NMMA to extend factory-training programs and concentrate the training as regards manufacturers' service and warranty work.

#### Industry Cooperation

Industry leaders need to actively pursue the entire issue of intra-industry cooperation. They should seek a stronger voice for marinas within the NMMA and cooperate to develop (1) an on-site risk management assistance program for marinas, and (2) a national marketing and advertising program to promote boating (TV, Internet, etc.). Industry should also strive to help local organizations be more effective and consider readjusting priorities, if needed, by informing about trends at events such as boat and related trade shows.

Sea Grant can assist in its capacity as a "neutral convenor." It can conduct research and share the findings concerning what is needed in order for the marina industry to achieve a more unified voice. The consensus of the group was that there is a need for bigger and more effective marine-interest organizations. Sea Grant might also become involved in establishing a user-friendly industry databank where industry statistics would be readily accessible for use by marina owners and other industry interests.

#### Professionalism

The industry is constantly changing, and professionalism is essential in order to compete and thrive. Small operators are particularly in need, and Sea Grant research and communications experts can share information regarding industry trends — consolidation, inter-generational transfers or integration, thus enabling operators to make decisions.

#### Financial

Sea Grant can also help educate the marina industry on the benefits of sharing standardized financial reporting data. Responses to date have been lukewarm at best. MOAA, IMI and others might be able to give the financial community more information about marinas and boatyards. NMMA could extend factory-training programs and concentrate the training as regards manufacturers' service and warranty work.

#### Private vs. Public Marinas

The debate between public and private marinas is never ending. Sea Grant might help education public marinas on the computation of real costs so that they may better analyze their pricing structure. Sea Grant can also conduct case studies of municipal/county accounting practices and share its findings with the nation's public marinas.

## **FOCUS GROUP REPORT—EDUCATIONAL ISSUES**

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**Co-Facilitator: Don Jackson**  
**University of Florida**

### **Participants**

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<b>National Association of Boating Law Administrators</b>	<b>Texas Sea Grant, TAMU Cooperative Extension Service</b>
<b>Mr. Virgil Chambers</b>	<b>Mr. L. Daniel Maxim</b>
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<b>Mr. Jan Delaney</b>	<b>Mr. Don Pybas</b>
<b>Florida Dept. of Environmental Protection</b>	<b>University of Florida Sea Grant</b>
<b>Ms. Glyn Johnston</b>	<b>Mr. Ron Stone</b>
<b>Personal Watercraft Industry Association</b>	<b>National Marine Manufacturers Association</b>
<b>Mr. Kurt Kalkomy</b>	<b>Mr. Bob Taggart</b>
<b>Boat Texas</b>	<b>Pier 121 Marina</b>

### **Situation**

The complexity of operating a marine facility in today's marketplace dictates that the facility management team invest in professional development and client education. Education will promote sound business practices, clean boating environments and a profitable enterprise. It is important that the industry and academic interests collaborate to identify an educational plan that will meet the challenges and provide a foundation for an environmentally responsible and prosperous transition into the 21st Century.

This focus group was charged with addressing the educational needs of the boater, marine industries, agencies and other boating interests that are identified by this process. What are the educational issues and needs of this clientele over the next decade? The farther we look down the road to plan for the future, the more capable the boating interests will be of handling contemporary problems that face the industry and clientele today.

To stimulate the thought process, the following sample questions were provided. This collegium process was designed to provide a plan of action for the educational needs of boaters, marine industries and regulatory agencies as we approach the next millennium.

**How can a marine facility use its customers to establish an environmentally sensitive and responsible business operation?**

**How can promoting education for environmental compliance become a profit factor at your facility?**

**How can facility management educate clientele to promote stewardship and clean boating environments?**

**How can the marine facility promote boater education as a part of the profitability of a business?**

**What should the roles of the various organizations be in providing boater education, and how can these efforts be coordinated to maximize the educational impact on boater education?**

**What incentives can be provided to encourage boater participation in safety courses?**



How should boater education be funded?

What issues should be targeted for local governments?

What educational programs should be provided for local, state, regional and national regulatory agencies?

What educational programs are needed by marine industry professionals (owners, managers, officers, dock hands)?

What do facilities need to do to be prepared to handle emergencies?

What educational programs are needed to address environmental problems caused by boating facilities and boaters?

What educational programs are needed to enable facility compliance with environmental regulations?

## **Problems and Opportunities**

Problems identified by the education group were clustered into the major topics of curriculum (safety and environmental issues), outreach, delivery, benefits through education, funding and access. The listing is in priority order of need, as determined by the study group and the input of the entire collegium. (More information in Appendix B.) Opportunities exist among these problems.

### Curriculum: Safety

There is an unmet need for mechanisms to reach the new and inexperienced boater. Boater safety courses now in use work, but may not be available or known to this target group of boaters. Home study versus classroom study was discussed, with preference given to classroom study whenever possible. It is realized that home study may be able to supplement classroom-based courses. Traditional courses may need to be more tightly focused on solving problems encountered in boating, both in the field of boating safety and in ameliorating environmental effects.

Special attention should be directed toward the people who rent and charter boats. Existing "check-out" procedures of renters and charterers of water craft may emphasize the mechanics of running the craft, but may not include any information or education on boating safety or environmental precautions.

Training of trainers is needed: 1) Basic training for those instructing marina personnel and others in the marine industry is needed because the number of well-trained instructors is low. 2) High quality basic instructor training should be offered and required because the quality of public boating instruction is directly linked to the quality of basic instructor training. 3) Marine law enforcement officers need special training on creating goodwill to accompany their enforcement efforts.

There is a need for better harmonizing of mandatory boater education programs from state to state. Reciprocity between states must be based on similar sets of education requirements. Mandatory education and licensing in one state while a neighboring state has no education/licensing requirement creates a mixed message to boaters on the value of any education.

Boating safety curricula must reflect education that is responsive to the major causes of boater injuries and deaths. Operating under the influence, falling overboard and capsizing continue to be major problems in boating safety. Boater education should provide information on how to prevent these problems.

### Curriculum: Environmental Issues

A number of environmental issues that should be known by boaters were discussed. Impacts on wetland habitats, sea grass beds, and the value of wetlands to fisheries were examples of information that should be provided to all boaters. The concept of limited resources and the need to preserve these resources are issues that boaters should understand. The information should also be practical. How to use a pumpout and the necessity of always using shoreside waste disposal are examples of information that may not now be getting to the new boater (or some seasoned boaters).

Marina construction and operations that are environmentally appropriate are vital to long range health of the boating industry and to public health. Education of people responsible for planning marinas in an environmentally appropriate manner is the key. The marina that encourages proper environmental practices by boaters will help keep the environment clean.

Boater safety education and information designed to educate the boater in environmentally sound practices may be parts of two different courses, although ideally, they should be taught together to take advantage of what may be a one-time access to the boater. As pressure mounts to cut the time of mandated courses, the environmental issues may be slighted. This should not be allowed to happen.

### Outreach

Competency-based education should be used. Courses should have pre-planned outcomes, and measurement should be made to assure accomplishment of these goals. All instructor training should be competency-based. All course planning for boater safety and environmental concerns should also be outcome-based.

Information on methods and practices in boater education should be sought internationally. As recreation becomes a more vital part of society's needs globally, better methods of instruction may be found with some research.

### Delivery

Boater education courses work well for those boaters who are reached. However, new methods of delivering courses, or at least information, must be sought. Web sites, cable TV, PBS and other distance learning modes may be required to keep up with the need for basic boater education. Marina operators, boat dealers, and operators of boat ramps may be able to provide formal, or at least informal, boater education. The boater should be able to identify the boat dealer as a source of high quality information on safe boating practices.

Private sector boater education is available to a small extent now; more should be encouraged. There seems to be enough need for boater education that private providers may be able to fill part of the gap in those needing basic boater education and those who have never had a formal course.

All boater education must be targeted to specific audiences. It does not seem appropriate to teach celestial navigation to the user of a personal water craft any more than to ignore the needs of those who are going to sea. Both types of boaters need basic, and perhaps further, instruction in proper procedures of safe and environmentally responsible boating. "One size" does not fit all.

### Benefits Through Education

A number of benefits should accrue through more and improved boater education. Safety issues will always be the first concern, and course information must result in reduced numbers of boating accidents. In time, reduced severity of injuries, reduced property damage costs, and reduced insurance claims could serve as performance measures of success.

A reduction in multiple-use conflicts should also be one of the aims of boater education. As waterways and shorelines become more crowded, the variety of uses will demand cooperation between all users, including boaters. The boater who is environmentally responsible will increase the public's confidence in boating as a compatible use.

Environmentally aware boaters will protect the environment of waterways and shorelines by their new concerns and practices, while advancing the quality of boating and other aquatic experiences.

### Funding

Reauthorization of the Wallop/Breaux Act is essential to the continuation of boater education and the provision of facilities that are environmentally sound. Also, the Clean Vessel Act should be extended. Great progress has been made in providing facilities for boaters through this act, but there are large gaps in the country where results of the Clean Vessel Act to date are missing.

Alternative sources of funding may be needed to continue boater education and to provide environmentally appropriate facilities. Partnerships with government and industry may be able to keep some efforts moving forward, but there are limits to how far this cooperation will go in filling the gap between the "educated" boaters of today, and the immediate future needs of those who have never been exposed to a boater education course.

### Access

There is a need for a site-specific national database on boat ramps. Most boats are trailerable, and boaters do travel out of their immediate home range, at least occasionally. Information should be available at least for trip planning purposes. A National Recreational Lakes System was mentioned as one way of solving the information gap on boat ramps and facilities outside of a particular boater's home range.

## **Action Items and Considerations**

Two safety issues should be considered for educational programming: boating and the industry. At the same time, the image of boating is important; it should be sold as "a fun industry." The group recommended that this forum be continued to promote partnership and cooperation within the marine industry. The following recommendations were also made:

### Needed Research

#### Demographic

Inventory of available education programs

Evaluate the role of education in boating accident events

Relationship of incidence of accidents to education

Curriculum performance standards

Differentiate issues that fit into boater safety education and boater education

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Use economics of recreation boating to educate legislative staff, regulators and other decision making officials  
Re-evaluate education delivery system  
Phased approach to boater education  
Encourage development of "pro" shop and boater instruction at marinas

#### Specific Educational Concerns of Marinas

These specific educational concerns of marinas need to be considered in another forum, since the makeup of the focus group and the group dynamics did not allow time to address these issues.

Staff development  
Professionalism  
Customer relations/satisfaction  
Uniform signage  
Minimum standards  
Americans With Disabilities Act accessibility  
Industrial safety  
Environmental issues  
Hazardous situations  
Delivery of safety message to boaters and customers  
Basic Skills for Expected Emergencies  
Standards for customer care

#### Awareness

Cultivating partnerships between government, industry and educational organizations  
More structured dialogue and coordinated efforts among varied marine interests  
Use boater demographics to identify safety information distribution  
Make boaters more environmentally conscious  
Use environmental responsibility as a marketing tool at marinas and dealerships  
Disseminate information at user contact points (registration, marinas, boat ramps)  
Evaluate minimum course content  
Use competency based education  
Seek information exchange internationally  
Increase awareness that recreation is a necessary part of society

#### Delivery of Education Information

Web sites  
Cable TV, PBS  
Use marinas, dealers and boat ramps  
Promote private sector education  
Target education to the audience

#### Benefits Through Education

Reduced boating accidents  
Reduced multiple-use conflicts  
Increased public confidence  
Increased quality of boating  
Decreased adverse environmental impacts

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### **Funding**

Reauthorization of Wallop-Breaux  
Clean Vessel Act extension  
Alternative funding sources

### **Access**

Site-specific national boat ramp data base  
National Recreational Lakes System

### **Education, Outreach and Communication**

Almost all of the focus groups had some concern about educational, outreach and communication issues. It was refreshing to observe that nearly every other focus group reflected needs in the area of education.

The group gave special consideration to the need to enhance environmental stewardship through education. This should involve reaching and educating the public and those involved in the marine community. It was concluded that fostering general public awareness on boating issues and responsibilities would generate greater public involvement to change laws and regulations at all government levels and make them more responsive to emerging needs of the recreational boater as well as the boating industry.

## **FOCUS GROUP REPORT—ENVIRONMENTAL & REGULATORY ISSUES**

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<b>Mr. Neil Christerson</b> Office of Coastal Resource Management	<b>Mr. Ken Kubic</b> East Passage Yacht Club
<b>Mr. Doug Coughenower</b> Alaska Marine Advisory Program	<b>Mr. Chuck Listowski</b> West Coast Inland Navigation District
<b>Mr. Rich Dornhelm</b> Moffett and Nichols Engineers	<b>Mr. Dan Natchez</b> Natchez and Associates
<b>Mr. Bill Dysart</b> Dysart and Dubick	<b>Mr. Eric Olsson</b> Washington Sea Grant
<b>Mr. Elliot Kempert</b> Charlotte County Government	<b>Ms. Margaret Podlich</b> Boat US

### **Situation**

Recreational boating facilities, like most commercial waterfront activities, have some effect on the marine environment. Many of these effects have been addressed and resolved through existing regulatory programs. However, confusion persists within the industry about how certain regulatory programs are implemented, and the link between these environmental programs and an improved environment. Often, decisions are made and programs implemented without adequately understanding the impact of certain marina and boating activities. The value and effectiveness of pollution abatement practices are poorly understood. New technologies for improving environmental compatibility are unexplored. For the marina industry to be sustainable, clear and concise information about these issues must be created and made accessible.

The focus group was charged with identifying and prioritizing environmental issues related to recreational boating facilities and boating activities that are part of the water-based recreational sector. Five key issues were identified and ranked. The top three issues, which received equally high scores, and represent, in the eyes of the group, 73 percent of the issues, are:  
Negative perceptions of boating impacts on the environment  
Regulations  
Waterway management.

Two other issues received significant attention:  
Education, outreach and communications (representing 18 percent of the cumulative problem)  
Pollution, (representing 9 percent).

Further, the group was asked to determine whether research is needed to uncover the effects of recreational boating facilities on the environment, or whether extension education is needed to take

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research results and present them more effectively so that they will be used more widely by environmental management programs. The group's deliberations are summarized below.

#### Negative Perception of Boating Impacts on the Environment

The negative perception of marine-based recreation is due to the lack of a unified approach and message about the effect of boating and related activities on the environment. Part of the problem's solution will require scientific research to refute negative perceptions based on anecdotal evidence, or to identify and prioritize sources of pollution to clarify boating's impacts. However, the major opportunities to resolve this issue are educational in scope. At the broadest level, all elements of the population (general public, elected officials, boaters, regulatory agencies) need to be addressed using plain language to change their perceptions of boating and its effects on the environment. At the management and decision-maker levels, clear coordination between federal and state legislators needs to be developed and maintained while incorporating boaters into the decision-making process. Fostering greater coordination in communicating the marine industry's message to all legislators would greatly aid in resolving the negative perception issue.

#### Regulations

From the industry standpoint, regulations are often inconsistent, confusing, conflicting and redundant. A great deal of technical information is available, but it needs to be collated and disseminated to prevent expending resources unnecessarily when dealing with regulatory matters. Regulations may not be cost-effective or achieve the intended goal. They can result in adverse consequences to the environment and may reduce or prevent public access to the water. Research that considers the cost effectiveness of various methodologies and techniques in project implementation would help resolve this issue.

There was consensus that the regulatory process needs to be streamlined. This could be achieved by designating a lead regulatory agency. There is a need, furthermore, to promote an even playing field by regulating the pollution rather than the polluter, thus eliminating the double standard.

Industry participation, and the use of good science and common sense should be encouraged in the regulatory process. This can be achieved by continuing to lobby state and federal legislators to consider the needs of the marine industry. The creation of high level boating advisory councils can also stimulate constructive industry involvement.

#### Waterway Management

Waterway conditions and boating opportunities will decline without comprehensive regional plans, policies and programs. Population pressures from unprecedented growth in the coastal zone create conflicting and competing uses and often result in resource depletion. The public's access to waterways is threatened by the continued wave of shore development. Waterway maintenance issues, such as dredging, habitat restoration, signage and boat traffic management, have been largely unaddressed, while the nation's boating population has doubled in the past twenty years. Instead of providing additional resources to meet these increasing needs, the federal government is reducing and redirecting funds away from recreational waterways and towards commercial harbors and deep-water ports.

Research is needed to create a foundational, scientific data base that can link the multi-faceted management needs of our nation's recreational waterways. An industry effort should be directed

towards redefining “commercial waterway” by the federal government. By including recreational and shallow-draft boating waterway infrastructure in the definition, federal funds can be directed back to their intended purposes.

### **Pollution**

Pollution problems are multi-faceted and regionally diverse.

Lack of user-friendly approaches to specific pollution prevention measures;

Marine industries are recipients of non-marine pollution from both point and nonpoint sources;

“No discharge” zones are not clearly understood and do not eliminate major sources of pollution; and

Solutions are not universally applicable or enforced.

Research is clearly needed to promote best management practice (BMP) research, to create user-friendly approaches to specific pollution preventive measures, to identify existing and new sources of non-marine pollution entering marinas—especially with respect to designating “no discharge” zones, and to identify pollution from prior occupants of marinas.

Extension education should be linked to disseminating research on BMPs and specific user-friendly pollution preventive measures. Overall, however, all segments of the marine community — from designer to user, including the insurance industry as a major player — should be recruited to promote pollution prevention.

### **Education, Outreach and Communication**

While extension education elements are woven throughout the issues statements and opportunities described above, the group gave special consideration to the need to enhance environmental stewardship by the entire marine community. This should involve reaching and educating the public about good environmental boating practices in order to foster peer pressure on all segments of society. The group felt that fostering general public awareness on boating issues and responsibilities would generate greater public involvement to change laws and regulations at all government levels and make them more responsive to emerging needs of the recreational boating industry.



## APPENDICES

### Appendix A. Marketing Focus Group

This appendix contains a compilation of the marketing issues and problems facing the marina industry. Below the problem statements are listed opportunities for actions to resolve problems and deal with issues facing the marine industry using the new approach.

#### **Marketing Issues**

Market Development and Retention

Marina Facility/Access Issues

Cooperative Marketing for Recreational Boating

Institutional Marketing

Marketing Information Development and Access

#### **Market Development and Retention**

##### Problems

Perceived market saturation and maturation throughout the industry.

Boating is not perceived as fun and easy because there is not enough training on how to use recreational boating products, therefore education is perceived as a limiting cost to potential boaters.

We develop new products for existing markets rather than develop new markets, therefore boating is losing market share to other leisure activities

##### Opportunities for action

The marine, finance, and insurance industries should develop programs are responsive to each other's requirements and the needs current and potential markets.

Set up forums to resolve and deal with conflicts among riparian interests, boaters, and other recreationists

Target current or potential markets that can be brought into boating

Partner with other recreation and tourism providers to develop, package and cooperatively market activities/ services that enhance and create new boating experiences

Develop and promote attractive recreational boat time-share opportunities.

Build, develop, and nurture recreational boating programs for youth

Marina operators should cooperate with stakeholders to develop and promote events related to children, parents, and family

The industry, working in partnership with other industry stakeholders, should promote water safety, boating, access to youth groups, and increase access to water activities

Market recreational boating experiences to seniors and retirees.

Develop and enhance public and private boater and boat safety and security programs.

Develop pwc riders and non-motorized boaters into lifetime boaters

Market boating as a positive and rewarding leisure activity.

Support continuing industry-wide education of all boaters( e.g., ethics, environmental protection, riparian rights, conflict avoidance)

The industry should take more responsibility for boating safety education.

The industry should educate customers on how to be better consumers and boaters

Boaters should be educated on their responsibilities and how that is tied to their future enjoyment of boating

#### **Marina Facility and Access Issues**

##### Problems

Limitations and increasing barriers to recreational boating access

Perception that recreational boating businesses and boaters are not environmentally responsible.

Growing perception that boating is not affordable

Real and perceived competition between public and private marinas has created conflict, a lack of communication and lost opportunities for cooperative projects and partnerships.

Deterioration of publicly provided boating infrastructure, (harbors, channels, boat launches)

Lack of national permitting standards for facilities and equipment

Barriers to entry into and exit from the industry

Need to attract more people back to the water

Marinas and boating facilities are often not perceived as an attractive destinations or recreational settings

#### Opportunities for action

Increase number and quality of services available to recreational boaters

Publicize progress of cleanups and marina practices (Blue Flag Achievement Recognition)

Encourage municipal governments to take a business-like or break-even approach to development and operation of public marinas

Identify cost-effective storm preparedness and environmental protection measures for "marinas/boater friendly" waste management processes.

Develop, publicize, and implement environmental programs that are cost-effective and reduce problems.

Technology is now available that allows marinas to be environmentally responsible and cost-effective and we need to encourage use of these technologies

More analytical customer-centered and rigorous approach to development and operation of boating facilities and services.

Promote the concept that boating is not just owning

Partner with other outlets in promoting boating (i.e. nearby malls, offices, restaurants)

Industry should develop model standards for permitting, facility and equipment issues and promote to different stakeholders.

The industry must develop and promote standards for codes of practices related to the environment, customers and ethical behavior

Explore public/private development of common interests in order to build the industry

Boating industry should be included in long-term community and coastal planning

Build partnerships between marinas and other types of land bases and water based recreational and tourist activities

Marina operates as catalyst and marina as hub

Publicize community cleanup occurring regarding environmental cleanup of waterways, adding access to waters, attracting people back to the water (especially in urban areas)

Accredit good environmental actions/locations and apply equally across public and private facilities

Industry should promote and publicize technology changes in boats that mitigate environmental problems and reduce noise.

Develop programs that encourage cooperative stewardship focused on environmental protection

### **Cooperative Marketing for Recreational Boating**

#### Problems

Industry fragmentation

Lack of focused cooperation among different sectors of the industry and between industry and other boating stakeholders.

Antiquated approach to marketing - selling, transaction marketing, 4 P marketing mix.)

#### Opportunities for action

Get a national spokesperson for an industry wide marketing campaign

Consolidate and integrate industry marketing efforts including theme development, cooperative campaigns integrating different media, and focused attention on recruiting new boaters.

Use new communication technologies such as the Internet, e-mail, to share and make information more accessible, lower communication costs, and favorably position recreational boating experiences.

Develop turnkey financial packaging of loans to increase accessibility to financing

Partner with different boat and boating services trade associations

Trade associations should cooperate in promoting recreational boating and the boating industry.  
Increase communication across the industry to coordinate system health  
Develop a national coalition or national coordinating body to promote boating experience  
Vertical versus horizontal marketing  
Reciprocal moorage opportunities  
Cooperate with other recreational industries: golf, charter, fishing

## **Institutional Marketing**

### **Problems**

Lack of accurate information to legislature and regulatory agencies  
Current approaches to boater safety (education and enforcement) are often inadequate  
Lack of awareness, and communication among key stakeholders regarding the different benefits and amenities associated with recreation boating in terms of:  
Economic impacts and other values  
Health benefits  
Boating heritage and history in the community  
Environmental benefits  
Conflicts between riparian and boater rights  
Benefits of boating as a quality of life and place issue are not understood or promoted  
Inadequate funding for enforcement of safe boating.

### **Opportunities for action**

Establish common objectives  
Advocate for public interest and support for marinas and recreational boating infrastructure.  
Persons working in recreational boating should become more actively involved in industry associations, recreational boating organizations, legislature, and their communities.  
Recognize and incorporate marinas and boating facilities as part of community and waterfront development efforts.  
Publicize positive efforts of industry to protect and enhance the environment.  
Develop relationships between fishing and boating interests and organizations in support of resource conservation and legislative awareness and assistance.  
Create more innovative and effective approaches to boating safety  
Advocate in support of sufficient funding of boating laws  
Proactively market to and educate non-boater legislators  
Partner with public/private organizations to create common legislative goals  
Promote and publicize the linkage between recreational boating and different aspects of quality of life.

## **Marketing Information Development and Access**

### **Problems**

Marketing effectiveness has been hindered by 1) lack of objective information, and 2) lack of access to objective information about the following:  
Existing, new, and potential consumers, their motivations and participation determinants  
Producers and suppliers of recreational services  
Products, facilities and infrastructure  
Recreational boating benefits and impacts  
Trends, forecasts and models  
Potential products and service/facility development opportunities  
Appropriate research and methods

### **Opportunities for action**

Identify and establish a clearinghouse of existing demand and supply information sources, consistent use of terminology, provide access to results (minimize access restrictions),  
Encourage researchers and organizations to share results of marina and recreational boating studies  
Consider 1) audience; 2) objectives; 3) marginal payoff; 4) effectiveness, and promote research standards and

protocols to ensure comparability

Set up tracking systems to monitor industry performance e.g., sales, occupancy rates over time

Determine factors driving choices of different leisure activities including boating

Develop marketing and simulation models usable in real time to facilitate communication and understanding of issues

Understand consumer response to marketing mixes, practices and product availability/development

Understand all boaters, not just boat owners

Understand conflicts, e.g. riparian versus boaters

Understand dynamics and demographics of boating consumers

Facilitate/identify cooperative funding mechanisms

Emphasize broad based support for and approaches to developing market information

## **APPENDIX B: Educational Focus Group Appendix**

This appendix contains a compilation of the educational clusters defined by the focus group, listed by priority in descending order.

### **Curriculum: Safety**

Effective education tool to reach new or inexperienced boaters  
Home study vs. Classroom education  
Training of marine law enforcement personnel to educated, not always fine boaters, create goodwill  
Need to refocus traditional courses - shorter, more focused  
Education of rental user and charter user  
Identify training needs for boater education  
Need to harmonize mandatory state education programs, for better reciprocity  
Mandatory education and licensing  
Boating safety education not responsive to major causes of fatal accidents, such as drunk boating, falls overboard, capsizing

### **Curriculum: Environmental Issues**

Boater impacts to wetland habitats (sea grasses, etc.) - value of wetlands  
Limited resources (physical)  
Environmental concerns  
Use of pump-out stations (commercial and recreational)  
Marina Construction

### **Outreach**

Lack of Incentives for boater education  
Letting boaters know there are insurance discounts for boater education  
Educating large numbers of people who have received no boater education  
Tourism (out of state arrivals)  
Boating safety - at boat ramps, on boat ramp etiquette  
Need to educate boaters at the ramp or in the marina before they venture out on water  
Need to educate legislators to socio-economic importance of recreational boating, so they don't enact laws or restrict activity that drives people away from boating.  
Education of regulatory agencies that water quality issues are not always caused by boating and marina industry activities

### **Educational Providers**

Mismatch in demographics of volunteer educators and students to be trained  
Lack of enough industry and government partnership - profit and non-profit  
Who's responsible for Education of boaters  
Develop greater concern among boat dealers for boater education  
Insufficient supply of educators (declining membership)

### **Extension Factors**

Funding of education programs  
Increase in numbers of boats and boaters  
Increase needs for boater education  
Training availability  
Water usage with growing population (conservation/quality)  
Shift in boater preferences  
Increasing diversity of types of vessels

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**Demographic Trends**

Aging of the population

Young boaters

Minority growth - cultural diversity

Cultural - ethnic communication

**Information Needs**

U.S.C.G. and state statistics are not completely accurate

Boating accident statistics - accident vs. exposure measures