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MARINA 2020



Marina 2020: A Vision for the Future Sustainability of Channel/ Arc Manche Marinas

INDUSTRY REPORT

RECOMMENDATIONS FOR BEST PRACTICE

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A Channel Arc Manche Integrated Strategy Project (CAMIS)



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Executive Summary

This project was undertaken as part of the INTERREG IV A Channel Arc Manche Integrated Strategy (CAMIS) Project, which has been running for 4 years since 2009. The Channel supports a well-established, diverse and vibrant marina sector which was identified as one of the key areas of potential growth and development in the region. The research aimed to identify the drivers affecting change in the Channel's marina sector, engaging with marina stakeholders across southern England and northern France, building an improved level of understanding of the industry, and using this knowledge to develop a strategic vision for the future.

The research found a number of factors driving development and change of the Channel's marina sector, including:

- Implications associated with the recent economic downturn,
- Rising costs associated with participation in the sport/sector impacting berth holder numbers,
- The importance of providing high quality service to potential and existing customers to maintain customer retention,
- Implications of recent environmental and planning legislation (dredging, designation of marine protected areas, red diesel etc.),
- Impact of poor weather in recent years on customer numbers, and;
- A lack of public and authority understanding of the value of marinas to their communities.

Following the identification of these drivers, the research aimed to establish potential solutions or strategies for the future that would allow the Channel's marina sector to harness the opportunities presented by an evolving industry. In particular, the research examined the role of clustering and collaboration in the development of the marina sector, in addition to the potential business diversification opportunities available to marinas, and their businesses.

Marinas contribute to the local economy and provide employment, often in areas where few local jobs are available. On both sides of the Channel, the research found that Marinas were not exploiting their full economic potential. At their best, Marinas are hives of activity, providing a range of services and facilities to boat users, visitors and businesses. At their worst, they are providing little more than a mooring. The research found participants to be particularly interested in the possibilities associated with clustering in the marina sector, identifying three types of cluster that could be applied to the sector: clustering activity within one marina site, clustering activity between two or more marinas and the development of Cross Channel marina clusters. While there were concerns associated with the development of clusters, such as a perceived loss of competitive advantage, the need to make sensitive information available to competitors and language barriers, overall, stakeholders were open to the benefits of clustering. Clustering, and the collaborative activity it encourages were recognised as having the potential to strengthen the sector, with a small number of marina sites already engaged

in activity of this type. In addition, it was found that stakeholders felt that diversification of marinas could be beneficial to the wider sector, with one stating that *“marinas are missing a massive opportunity...they are a wonderful place [for a company] to be based and so they should do more to make natural work hubs”*. However, it was also noted that opportunities for diversification could be limited by location, size of site and customer catchment area, ownership issues (particularly in France), as well as financial constraints.

Overall, the research served to identify where the sector envisions itself moving in the future, engendering the development of an ideal scenario. This allowed the vision of a ‘good marina’ to be defined, as shown below.

A good marina will:

- **Be both economically and environmentally sustainable, with a significant role within the local community in terms of leisure activities, economic growth, jobs provision and skills and training.**
- **Have strong links with tourism organisations, promoting the local area and attractions to visitors to create a more complete ‘destination’ for both permanent and visiting berth holders**
- **Will be well established as a community asset, viewed as a vital component of Channel communities, with support from local authorities.**
- **Operate at close to full capacity on both sides of the Channel, and will promote cruising between sites to ensure widespread benefits of visiting vessels.**
- **Have a thorough understanding of the environmental and planning legislation impacting the sector, through improved relationships with policy makers and increased involvement with the marine planning process and future policy development.**
- **Have strong environmental strategies in place, engage widely with associations such as the Green Blue to improve awareness among staff and customers, and ensure the sector is as ecologically sustainable as possible.**
- **Will have collaborative and mutually supportive business relationships with local and regional businesses.**
- **Will feel effectively represented at all policy levels by their trade associations, and have a ‘voice’.**
- **Will be actively engaged in sustainable operation practices, ensuring they are providing the highest possible quality of service to their customers. Action points will include:**
 - **Provision of WiFi at berths for berths, taking advantage of internet based promotion and booking facilities to support the sector.**
 - **Promoting ‘green’ behaviours from both customers and staff; for example, through provision of recycling facilities, effective grey water disposal points, providing information on sensitive marine ecosystems, and ensuring there are effective management procedures in place to treat run-off.**
 - **Communication with berth holders to evaluate service provision to see where changes could be implemented,**
 - **Engagement in supportive and collaborative business relationships with on-site tenants and local companies, ensuring customers are provided with a comprehensive level of service.**
- **Finally, a ‘good’ marina will engage in collaborative relationships within the sector and will, when appropriate, engage in clustering activity (on a range of scales) and knowledge exchange.**

As part of the research, number of recommendations were developed which are outlined in more detail throughout the document. These recommendations can be grouped into categories depending on whether for marinas, local businesses or local authorities as summarised below:

Recommendations for Marinas:

- Assess and promote the level of economic input into local communities through the marina. By actively promoting the sector as directly or indirectly injecting money into the local economy, marinas can improve their relationship with the local community, enhancing the level of support they receive from other businesses and their local authority.
- Actively work to engage in sustainable operation practices: communicating regularly with customers to ensure needs are being met, promoting 'green' choices to both staff and berth holders, as well as collaborative engagement with local businesses and tenants.
- Marinas should ensure they are an active part of their local community, engaging in local meetings, promoting careers opportunities within the sector and working to build strong relationships with local authorities. By strengthening their role within the community, the value of marinas to their communities will be better understood and opportunities and support for growth will be easier identified.
- Look at the opportunities available for marinas to work together on a collaborative basis. Marinas have the potential to develop successful clusters, working with local and on-site businesses, as well as their local authorities, to support growth and development of the sector. Clusters have the potential to reduce costs, give access to new market opportunities while increasing revenue.
- As well as looking at collaboration opportunities within the UK, it is suggested that marinas would benefit from engaging in knowledge exchange with French marinas. Working on a cross border basis would allow marinas to learn from each other, working to provide a standardised high quality of service to berth holders, and allowing best practice to be developed across the region.
- Marinas should support the development of cross border networks and initiatives such as a Channel Marina Passport and the Channel Marina Cluster. Activities of this type have the potential to increase participation in the sector by attracting new customers to marinas across the Channel's coastlines.

Recommendations for local businesses:

- Be aware that marinas can be a valuable customer base, for either marine service companies or supporting services, such as retail or entertainment. Building relationships with local marinas, so that they actively promote businesses to their customers could provide access to a new customer base; with minimal promotion costs, while increasing overall revenue through increased footfall.
- Identify opportunities to work on a collaborative basis with your local marinas – the easiest way can be through a discount and promotion offer, as recommended

- through the development of a Channel Marina Passport. This type of agreement can be mutually beneficial, is inexpensive with the potential for high profitability.
- On-site tenants and local businesses engaged in related activities have the potential to collaborate very effectively with marinas, through the development of clusters. This type of activity will increase the profile of both the marina and the businesses it supports, providing mutual benefits to all members.

Recommendations for Local Authorities:

- Work to improve understanding of the marina sector, along with their associated businesses within your local community. They are a valuable asset and can be used to promote tourism, increase visitor numbers, market your community as a destination and actively support local businesses, such as cafes, bars and restaurants.
- It is suggested that local authorities get to know the marina operators in their local community, building and improving relationships to ensure a mutually beneficial decision making process, where the value of marinas to the local community is understood. Local business networks could be established that foster communication and engagement between the various members.
- Local authorities should have working understanding of the value of marinas to the local community, and consider the socio-economic value of this sector, as well as the environmental considerations when discussing plans for development.
- Ensure that information provided to marinas regarding planning permission, changes in legislation, application processes and environmental obligations is clear and accessible. By ensuring that the information is communicated in an effective way, conflict will be reduced and implementation of new procedures etc. will be easier.
- Engage with national bodies, such as The Yacht Harbour Association, the RYA, the Marine Management Organisation, the British Marine Federation, or the French Federation of Marinas, to ensure there is a thorough understanding of how the sector could be supported in its bid to achieve economic, social and environmental sustainability.



Chichester Harbour, Bosham, West Sussex. E McKinley, 2013

1.0 Introduction

The Channel Arc Manche Integrated Strategy (CAMIS) project is a 4 year Interreg IV A France (Channel)-England funded project, starting in 2009. CAMIS is a collaborative project between 19 partners across the south coast of England and the northern coast of France. The primary objectives of the project are to improve understanding of the region's maritime sector, developing an integrated management and policy strategy for the Channel region. The Marina 2020 research was conducted under Strand 3 of the CAMIS project, assessing the role of business clusters for the Channel regions' diverse maritime sector, generating best practice recommendations to support maritime cluster development.

The Channel/ Arc Manche region supports a diverse and active maritime industry, a sector recognised as being a key focus point for the European Blue Growth Strategy (2012). With marine and coastal leisure tourism identified as being one of the more mature maritime sectors within the strategy, this research into the future of the marina sector in the Channel region is very timely.

The marina sector has undergone something of an evolution in the last twenty five years, with marine leisure and in particular, marinas, recognised as having an integral role in the wider maritime economy, on a local, national and European scale. Despite this trend of growth and development, recent research suggests that marinas on both sides of the Channel could do more to realise the benefits that this growth affords. Additionally, in a time of economic constraint, this research

proposed that the marina sector could work collaboratively to promote and develop their sector in a way that would ensure a sustainable future for the industry.

The following report sets out the findings and recommendations from the Marina 2020 research carried out by the University of Chichester as part of the CAMIS project. The research was carried out between 2010 and 2013, and aimed to develop a vision for the future sustainability of the marina sector within the Channel region.



As a sector, marinas are the focus for a diverse range of services including tourism related services, equipment design and manufacturing, insurance brokers, maritime planning and legal services. The Channel coastline is dominated by marinas, with over 200 located along the English and French coasts.

Figure 1: An illustration of the distribution of marinas across the Channel coasts.



Marinas in the Channel region face many competitive challenges including increased berth supply in other parts of Europe, which is supported by improved accessibility through low cost flights and a more favourable climate (BMF, 2007 p.9). Although French local authorities continue to invest some money in the development of marinas, the sector, particularly in the UK, has experienced a lack of understanding of their economic potential by local authorities and government bodies, limiting support for growing the sector and adding value to the services it provides. In the midst of the economic downturn, with a culture of increasing corporate environmental responsibility, marinas face challenges to ensure their long-term sustainability. However, despite this, marinas are well placed to integrate with their communities, increase their involvement in socio-economic development and environmental sustainability, as well as play a role in science and research. While recent years have brought challenges to the sector, attendance at recent events, such as the 2013 Southampton Boat Show suggests that things are beginning to improve for marinas. However, in spite of these early positive signs, it is clear that the status quo has changed and the marina sector must adapt to a change in its circumstances, ensuring it is in a position to both address new challenges and take advantage of new opportunities.

The Marina 2020 research aimed to look at how marinas in the Channel region are responding to these challenges, identifying the driving factors for the sector and using input from industry stakeholders and experts to generate best practice recommendations that can ensure the sector achieves long-term sustainability.

2.0 Methodology

This section of the report presents the two-phase methodological approach taken to conduct the research.

The Channel region supports a diverse and vibrant marina sector, with marinas exhibiting differing ownership and management structures subject to a range of socio-economic and geographical factors. Therefore, the development of an overarching vision that was representative of the sector across the Channel was a complex process. A mixed methods approach was identified as the most appropriate research framework to apply to this study.

The key phases of the project included:

- An evaluation of the marina sector: identifying and assessing the range of factors considered to influence the growth and development of marinas, and the sector as a whole. This was conducted through a desk-based literature review to establish global trends that could be applied to the Channel region.
- Identification of key drivers, used to guide the development of an interview and questionnaire based survey to obtain expert information about the sector.
- Conducting stakeholder interviews and questionnaire participation with representation from marina groups, trade associations and local authorities across the region.
- Identification of potential solutions and mechanisms of growth that could be used to generate recommendations that would support development within the sector.
- Generation of a strategic vision for the future driven by the information gathered through the research.



3.0 Discussion of Results and Main Observations

A number of marina stakeholders and experts participated in the study, identifying five categories of common factors impacting the Channel's marina sector. These included:

Economic Drivers:

- The economic downturn in 2008, its long term implications and the impact of this on costs and available disposable income.
- Increased cost of fuel and services negatively impacting participation.
- Higher costs associated with development and diversification making growth of the sector more difficult.
- Pressure from marinas in other countries offering services at a lower cost combined with easier access through increased availability of low cost flights.

Environmental Drivers:

- Recent changes to environmental and planning legislation impacting development of new and existing marina sites.
- Implementation of Marine Conservation Zones, which may result in restrictions to sailing routes and anchorages.
- Waste management and recycling on marina sites, including the decommissioning of old boats.

Social Drivers:

- Changing demographics, mainly resulting in an older customer base.
- The cost of involvement and the perceived need for a significant amount of disposable income available to customers. Research suggested that older customers are more cautious with their money and the younger generation do not have the funds to access the sector.
- A need to improve the role of marinas within their community to ensure that their value is better understood.

- Need for improved relationships between local government, local communities and marinas to support collaborative economic growth.

Technological Drivers:

- A need to ensure customers have access to WiFi to keep up with the 24/7 lifestyle.
- Emerging internet based booking systems that promise to increase efficiency.
- Promotion of renewable energy sources.
- Use of dry docks to increase capacity where demand is higher than supply of berths.

Political Drivers:

- Implications of changing legislation, lease renewals and ownership structure.
- In France, there is a need to ensure there is a balance of activity on the coast, meaning marina development may not always get political support.

Each of these factors was discussed in the context of the Channel region and considered to be of significant impact to how the sector develops over the coming years.



3.1 Solutions for the Future

Throughout the research, we identified a number of factors driving change in the marina sector, presenting themselves as both challenges and opportunities for marinas. By working with marina stakeholders, we were able to establish how these applied to the Channel's marina sector, and begin to identify ways through which these could be addressed.

3.1.1. Marina Clusters

One of the primary aims of the research was to examine how the formation of marina based clusters could benefit the sector.

Clusters are commonly defined as associated companies within a sector that are geographically linked, who work together towards common goals, address common challenges and work collaboratively to achieve mutual benefits (Chang, 2011; EC, 2008; Porter, 1998). Clusters will usually have a diverse range of members and will often include manufacturers, service providers, sales and management organisations, and increasingly include local authorities, trade associations, universities and research institutions among others (Porter, 1998).

Research has shown that members of clusters experience numerous benefits including:

- Increased revenue,
- Reduced costs and expenditure through engaging in group purchasing schemes,
- Increased competitive advantage for member organisations, collaborative promotion of member businesses,
- Enhanced profile of member business, increasing added value to the marina sector and related services,
- Access to new customers and market opportunities

(Chang, 2011; Malakauskaite and Navickas, 2010; EC, 2008; PRC, 2008; Novelli et al, 2006; Bell, 2005; Benito et al, 2003; Porter, 1998).

The uptake of clusters based activities has increased within the maritime sector, with clusters more commonly viewed as a tool for adapting to change, revitalisation of the sector

and regenerate maritime industrial sectors (De Silva, 2013; Concalves, 2011; Chang, 2011; Holte and Moen, 2010; PRC, 2008; EC, 2008; Benito et al, 2003).

Marinas are not usually stand-alone businesses; rather they are often supported by either on site tenants or local businesses that provide related services. This structure, along with their location, provides them with an ideal opportunity for collaboration, and formation of effective clusters. Earlier research for the project identified their formation as a potential mechanism through which marinas could increase profit and sustainability. At this point, it is worth noting that although the Marina 2020 research did not identify any evidence to suggest that there are successful clusters in the Channel region, it did highlight some examples of cluster like behaviours: for example, collaboration that happens between the marina groups in the UK (seen in MDL, Dean and Reddyhoff) and the presence of the Cote d'Opale marina group in northern France, as well as other regional associations such as, the Association des Ports de Plaisance de Bretagne (APPB) and the Union des Ports de Plaisance du Nord-Oest in Picardy and Normandy.



By developing marina clusters, the marina sector will raise the profile of the Channel's marinas, increasing visibility of the SMEs that provide their support services, giving these businesses a greater voice. Figure 2 shows an example of the types of businesses and levels of the supply chain that could be included in a marina cluster, indicating the presence of both essential and supporting product and service suppliers/ providers.

Figure 2: An example of the types of companies that could be members of a marina cluster.

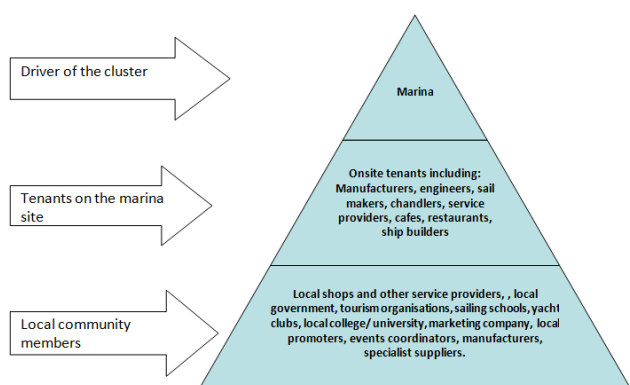


Through the research, we found three types of cluster activity which could be applied to the Channel region’s marina sector. Overall the consensus was positive, with the formation of marina clusters and increased collaboration across the sector seen as an opportunity to support and encourage growth. Within each section, examples of the types of activities that could be supported by that type of cluster activity are discussed. It is important to note that not every activity will be suitable for every marina site in the Channel region.

1) Within Marina Clusters

A **within marina cluster** is defined as a marina company working with their on-site tenants, and/-or with businesses in the local community for mutual benefit. These clusters will commonly include a marine operator, marine related businesses such as chandlers, manufacturers, additional service providers, but can also include local authorities, service providers in the local community and local tourism organisations.

Figure 3: Suggested composition of a within marina cluster



Through the Marina 2020 research, we found that developing clusters of this type could result in a number of benefits for the sector including:

- Lower costs and expenditure through group purchasing programmes.
- Delivery of collective skills and training programmes, such as health and safety training programmes that can be run for all businesses within a marina site.
- Increased visibility of SMEs, raising the profile of both the marina and the member businesses,
- Increased revenue and market opportunities as a result of collective promotion of a marina site, and its associated businesses.
- Improved relationship with the wider community through collaborations with local businesses and improved relationship with local authorities, resulting in more support for the marina sector.

There was evidence to suggest some activity of this nature already happening in the Channel region:

“There are about a dozen tenant businesses here and it is in everybody’s interest to make sure that those businesses thrive, because not only do they pay us rent to be here, but they provide a real marketable service for us”. Harbour Master, SE England

“Where there is a vested interest in supporting tenants in the little things...such as a bulk purchasing agreement...that would make sense”. Marina Manager, SE England

CLUSTER ACTIVITIES

- **Group purchasing and training programmes.** These could be arranged between the marina and its onsite tenants to reduce costs for all member businesses. By grouping together, marinas and their businesses could make bulk purchases of common resources (e.g. stationary) or organise collective kit

testing (e.g. fire extinguisher testing), **reducing everyone's costs**. This type of activity would have minimal impact on competitive advantage and would generate mutual benefits across the board.

➤ **Creation of a 'one stop shop' for customers.** Many marinas are in a unique position to work with associated businesses. By building collaborative relationships with on-site tenants and local businesses to ensure customers are offered high quality service that is easily accessible and affordable, benefiting both the marina and the companies by keeping business on site or local. Marinas can offer customers a more comprehensive level of service, adding value to the overall experience for their berth holders.

➤ **Increased role within the local community:** Working with local businesses, such as restaurants etc., marinas can encourage their customers to patronise local shops, cafes and restaurants, injecting a significant amount of revenue into the wider community. Another example of this was identified in Cornwall with one marina working closely with local charities to enable people with disabilities to engage with marine leisure activities.

➤ **Collective promotion of the marina and its businesses:** Clusters have the potential to act as a collective marketing tool, allowing the marina and its businesses to raise their visibility by actively promoting each other as providing high quality services. This could be done through printed leaflets or on the marina website.

2) Between Marina Clusters

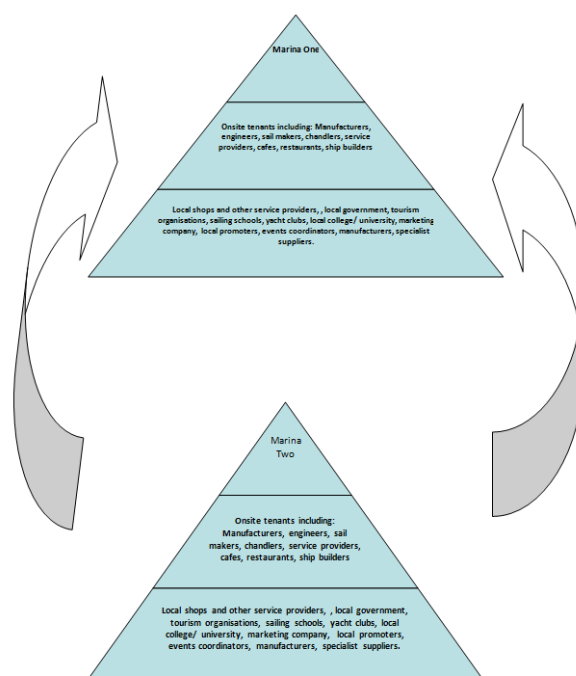
Two types of **between marina clusters** were identified through the research. These can be defined as a cluster comprised of either:

- Two or more geographically disparate marinas working together on a collaborative basis, along with on-site tenants, businesses and service providers within their local communities and with

the involvement of local authorities. By working with geographically disparate marinas, the challenges associated with competitive advantage and customer retention can be addressed, as members will be involved in a cluster that engages mainly in knowledge exchange, and encourages berth holders to cruise along the coast.

- Two or more geographically proximate marinas working together on a collaborative basis, along with on-site tenants, businesses and service providers within their local communities and with the involvement of local authorities. This type of cluster will predominantly be focused on developing effective knowledge exchange practices, could engage in group purchasing and training programmes, and has the potential to collectively promote and market their region to visitors. E.g. include efforts currently being made with marinas in South West England.

Figure 4: Suggested composition of a between marina cluster



As before, a number of benefits were identified that could be associated with this type of marina clusters, including:

- Greater opportunity for effective knowledge exchange through clustering between two or more marinas.
- There is a chance for marinas to engage more effectively with their local tourism organisations, playing a bigger role in terms of marketing their local areas as a whole: *destination marketing*.
- By working together, marinas in the same area, can improve how they are perceived by both the local community and their local authorities, helping to build better and more supportive relationships, in effect resulting in a better lobbying presence for the sector.
- Opportunities for economic growth and development through improved support for collaboration with on-site tenants and local businesses. This will be aided by strengthening the role of marinas within their local and regional area.
- Marinas located in different areas can also work together to provide additional services to their customers. Marinas in different locations, such as the Isle of Wight and Dorset in southern England, could collaborate to give their customers the same offers. It is thought that this kind of initiative could improve the overall experience through welcoming visiting boats, offering discounted rates and encouraging cruising across the Channel coasts.
- By working as a collective, marinas could increase the profile of their local area as an attractive area for visitors, engaging with the local tourism organisations to raise the overall profile of the region and encouraging economic growth across a range of businesses.

"In the last 2 to 3 years, the [local] marinas have all got together in an unprecedented way, to form a sort of cluster...talking to the city council to show them how they can use us as a tool, and how we will support them, what glamour and value the waterfront has for marketing the area as a whole".

Marina Manager, SW England

"It would be difficult for us to have that relationship with Cowes or Lymington because they are so close to us...but if we could see that people are cruising, we can drag them across the coast...I don't see that as a competitor to us, and it might actually help us"

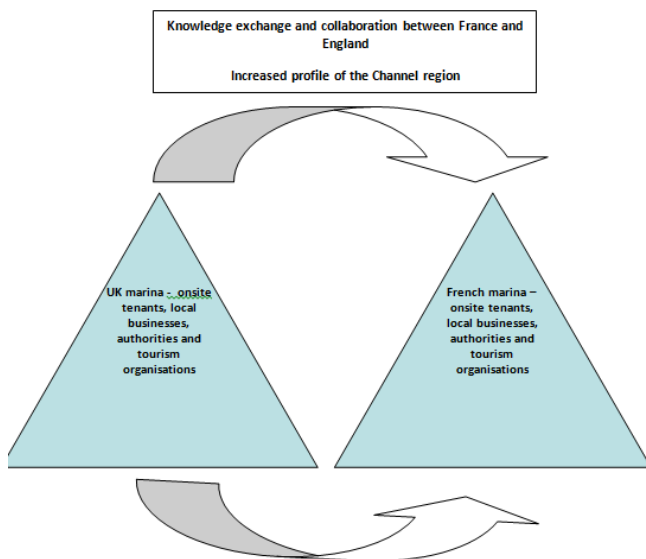
CLUSTER ACTIVITIES

- **Collective marketing of the local area:** Examples of this type of activity have already been seen in Devon, SW England, where four local marinas have joined forces to raise their profile within the local community, addressing their local authorities to show them how they can be used to market the local area. Additionally, these marinas communicate regarding their prices and services when they are large events happening in the area to ensure all visiting boats receive a high level of service at an optimum price, enhancing the overall experience for the customers.
- **Active promotion of cruising along the coastline:** Marinas that are not located near to each other are often not viewed as a competitive threat, meaning that collaborations along the coast can often be the most successful. Marinas can work together to promote cruising to their berth holders, offering discounted berthing rates at a range of marinas along the coast (for example, Lymington, Yarmouth and Poole along the English coast). This could be supported through the development of a passport type scheme for either independent marinas or marina groups (such as MDL marinas or Dean and Reddyhoff).

3) Cross Channel Marina Clusters

A cross Channel marina cluster would involve marina operators on both sides of the Channel, working with on-site tenants and associated local businesses within the local community, engaging with the local and national authorities in England and France. A cross Channel marina cluster would mainly facilitate and improve knowledge exchange across the Channel's marina sector, improving resources and facilities for customers on a Channel basis, and implementing a Channel wide strategy for the on-going success of the sector.

Figure 5: Composition of a Cross Channel Marina Network



The development of Cross Channel clusters was seen as an activity that would have positive benefits for the region's marina sector, with many lessons to be learned from knowledge exchange across the Channel. Benefits identified through the research included:

- Identification of common goals and challenges across the Channel region, encouraging the development of collective solutions that could be applied at a number of marina sites, supporting the sector as a whole.
- Improved relationships and opportunities for knowledge exchange across the Channel region was seen as a chance to learn from other experiences,

and viewed as a significant benefit for marinas on both sides of the Channel.

- Generation of best practice strategies with examples of success stories that could be used to support the whole Channel region's marina sector.
- Improved promotion of the sector and its associated businesses across the wider European region.
- Through improved relationships, it was thought that new market opportunities could be identified across both England and France.
- Enhanced participation in the sector as a result of providing additional services to customers through increased cruising opportunities across the Channel region.
- Overall, the development of a cross Channel cluster could be used to enhance the profile of the Channel region as a centre of excellence and expertise for sailing, increasing the market value within the global marina sector.

"When you actually consider cross border collaboration, it's actually deemed to be less of a threat...it is added value to their business", "a commercial benefit" and that "it's very important for marinas to work together". UK Marina Trade Association Representative

"Increase the economic activity of the region" and could "open up marketing opportunities". French Marina Operator

Although there are no real success stories regarding cross Channel relationships, it was clear that there is a desire among marina stakeholders to change this. The Marina 2020 research suggests a number of ways in which Cross Channel Marina cluster activity could be encouraged.

CLUSTER ACTIVITIES

➤ *Facilitation of a Cross Channel Marina Cluster through regular meetings:*

A Channel wide marina cluster could be facilitated through the organisation of meetings that could be used to improve relationships between marinas across the Channel, act as a networking opportunity for members and encourage knowledge exchange between marinas in the region.

➤ *Development of a Channel marina portal/website:*

It was suggested that the sector would benefit from the development of a website that would promote marinas across the Channel region. The website could be used as a tool for people looking for cruising routes, available berths, providing information about associated businesses in marinas and as a communication tool for member businesses.

➤ *Development of a passport scheme across the Channel region:*

The generation of a Channel passport scheme would improve relationships between marinas, encouraging them to work together to produce a passport scheme that would add value for their customers. This type of scheme has the potential to increase participation and improve the experience for customers.

The basis of the passport scheme would be that users could benefit from a range of discounts offered by on site tenants and local businesses, such as restaurants, shops, and boat services, and would encourage members to cruise along the coast and across the Channel visiting member marinas. It was suggested that by offering this kind of added value to customers' experiences, participation would be increased, and the sense of value associated with the sector would be enhanced.

There are existing examples of successful schemes of this nature, including the Passport Escales (developed by PrimOcean). This

scheme supports 80 marinas in building relationships across the sector.

➤ *Encouraging cross Channel activities, such as Regattas:*

Organising events that include and promote both sides of the Channel would improve the relationship across the region, increasing communication between marina sites. Regattas and group cruises could be organised to include stopovers on both sides of the Channel, encouraging cruising across the region, increasing levels of participation and value for the customer. Events of this type would increase in popularity and would gradually raise the profile of the Channel region as an area of excellence and expertise.

➤ *Twinning of Channel marinas:* It was suggested that marinas could benefit from a marina twinning scheme, building a relationship between a French marina and an English counterpart. It was thought that this type of relationship would facilitate knowledge exchange between marina operators, while enhancing the services provided to customers through cruising opportunities and berthing discounts offered to member boats.



3.1.2. Diversification of Marinas

In addition to improving collaboration, we found that supporting business diversification could be a mechanism through which marinas can support long term sustainability and economic growth. Earlier research has shown that by expanding and diversifying business activities, a sector can become re-energised, encouraging growth and development (Trott et al, 2009).

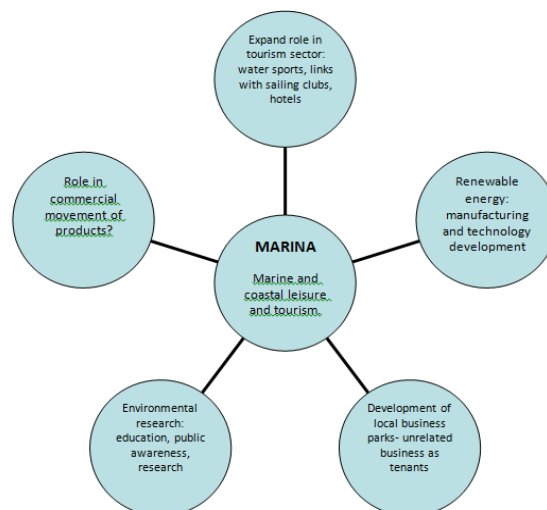
Marinas are in a key position to support diversification as they are often located in close proximity to businesses linked to a range of sectors, giving them access to numerous opportunities to expand and diversify their businesses.

Through the Marina 2020 research, we found that while capacity to diversify is dependent on space and resources, opportunities exist for marinas to become involved in a range of activities including:

- Renewable energy development, such as supporting the construction and maintenance of MRE vessels,
- The support of local businesses through the development of business parks,
- An enhanced role in local and regional tourism industry by developing hotels, spas and leisure centres on marina sites,
- Active engagement in environmental research through collaboration with universities and research centres.

We suggest that diversification of business activities could be a way of allowing marinas to adapt to the changes caused by the key drivers identified in the earlier phase of the research. The figure below presents some of the potential opportunities for diversification that could be supported within the marina sector.

Figure 6: Potential options for business diversification within the marina sector.



“That they are missing a massive opportunity...they are a wonderful place [for a company] to be based and so they should do more to make natural work hubs”. Marina Operator, Southern England

“Business diversification can present a unique opportunity to the marina sector”. Chambers of Commerce Representative, Northern France



3.2. What are the Challenges?

As expected a number of challenges were identified, suggesting that achieving success for the Channel's marina sector may not be easy. The key challenges are:

- Concerns regarding the loss of competitive advantage as a result of increased collaboration across the region. Earlier research has suggested that successful clusters can support both collaboration and competition, ensuring all member companies are viable and successful (PRC, 2008; Porter, 2998). Through the Marina 2020 research, we found that clustering and improved collaboration between marinas and their associated businesses would be welcomed, as long as an appropriate way of doing so successfully was found.
- Given the various ownership structures, it is reasonable to expect that there are a range of management approaches and funding opportunities exhibited across the Channel's marina sector. It was thought that these differences could make collaborative activities difficult due to a lack of understanding and varying business needs. However, while these differences might make cluster development challenging, it could be that rather than causing difficulties, clustering may be used as an opportunity to learn from these varying approaches to the sector. Additionally, it should be noted that collaborative activity would be organised so that it focused on the common goals of those member organisations.
- For successful collaboration to happen, the research found that an appropriate leader would be needed to drive a marina cluster forward. Where cluster activity is supported, it would be recommended that member organisations work together to nominate a leader who can coordinate and facilitate cluster activity successfully.
- Clearly, there is a language difference across the region which was identified as a potential challenge through the research. However, this difficulty could be addressed through the development of effective communication strategies for the cluster, supported by bilingual training programmes organised through a cluster.
- Business diversification has the potential to support change and future economic development across the marina sector. However, the opportunities for diversification may be limited by resources availability, space, capacity for expansion (including skills and experience within the local community), market demand and funding for changes to infrastructure. Diversification may not be suitable for every marina site, but where possible, it is thought that by supporting marinas in this type of change, a more long term vision for the sector could be ensured.



3.3 What is a 'Good Marina'?

We found that stakeholders wanted to have a better idea of what a 'good marina' could be defined as, giving them something concrete to work towards. Through the Marina 2020 research, and close collaboration with stakeholders, we were able to establish the ideal characteristics of a successful marina in the Channel region. This information was used to generate a definition for 'a good marina' which is as follows:

A GOOD MARINA WILL:

- **Be both economically and environmentally sustainable, with a significant role within the local community in terms of leisure activities, economic growth, jobs provision and skills and training.**
- **Have strong links with tourism organisations, promoting the local area and attractions to visitors to create a more complete 'destination' for both permanent and visiting berth holders**
- **Will be well established as a community asset, viewed as a vital component of Channel communities, with support from local authorities.**
- **Operate at close to full capacity on both sides of the Channel, and will promote cruising between sites to ensure widespread benefits of visiting vessels.**
- **Have a thorough understanding of the environmental and planning legislation impacting the sector, through improved relationships with policy makers and increased involvement with the marine planning process and future policy development.**
- **Have strong environmental strategies in place, engage widely with associations such as the Green Blue to improve awareness among staff and customers, and ensure the sector is as ecologically sustainable as possible.**
- **Will have collaborative and mutually supportive business relationships with local and regional businesses.**
- **Will feel effectively represented at all policy levels by their trade associations, and have a 'voice'.**
- **Will be actively engaged in sustainable operation practices, ensuring they are providing the highest possible quality of service to their customers. Action points will include:**
 - **Provision of WiFi at berths for berths, taking advantage of internet based promotion and booking facilities to support the sector.**
 - **Promoting 'green' behaviours from both customers and staff; for example, through provision of recycling facilities, effective grey water disposal points, providing information on sensitive marine ecosystems, and ensuring there are effective management procedures in place to treat run-off.**
 - **Communication with berth holders to evaluate service provision to see where changes could be implemented,**
 - **Engagement in supportive and collaborative business relationships with on site tenants and local companies, ensuring customers are provided with a comprehensive level of service.**
- **Finally, a 'good' marina will engage in collaborative relationships within the sector and will, when appropriate, engage in clustering activity (on a range of scales) and knowledge exchange.**

4. Conclusion, Recommendations and Opportunities

The Marina 2020 research provides us with a valuable insight into a diverse and complex sector, one that is of significant economic importance to both England and France. The strongest conclusion to come out of the research was that the sector would benefit from a more open approach to management. In particular, marinas within the Channel region should actively engage and collaborate with each other to strengthen their profile within the global marina sector, fostering a sustainable approach to operations and promoting both the sector and the region as an area of expertise.

Through the Marina 2020 research, we found that there are a number of common goals and challenges impacting the Channel's marina sector. By evaluating these, we have been able to generate a list of recommendations that could be adopted by the sector to ensure sustainability, highlighting opportunities for growth and development in the future.

4.1. Support Development of Marina Clusters

The first set of recommendations applies to the formation of marina clusters. Throughout the research, this type of activity was consistently viewed as being a positive development for the sector, acting as a mechanism through which economic growth and sustainability can be maintained.

- ❖ Recognition that one size/style of cluster will not be suitable for every marina site and the development of a cluster will need to be driven by its own specific needs.
- ❖ Marinas need to actively support their tenants, and should work closely with local businesses to create a more attractive facility for their customers. By improving collaboration, and diversifying the services provided with the local area, marinas can improve the customer service, increase the value experienced by their customers, and ensure overall customer retention.
- ❖ Encourage the development of clusters between the smaller and independent marina sites so that they can benefit from

utilising collective resources and experience. Evidence of this already exists in SE England and the Cote d'Opale, Northern France.

- ❖ It is the recommendation of this research that marinas in the region support the clear call for a Channel wide marina network. A Cross Channel cluster of this type could foster collaboration across the region between marina businesses, as well as encourage cruising and customer exchanges.
- ❖ Given the differences in language, ownership and management strategies, it is also recommended that marinas across the region would benefit from engaging with meetings associated with a Channel Marina Cluster as it would encourage knowledge exchange and improve understanding of the differences exhibited by marinas in the region. Additionally, it is suggested that a cluster of this type could support other activities such as a twinning programme and the provision of bilingual training and communication.
- ❖ Development of a Channel marina passport scheme which could involve a significant number of marinas in the region, and would encourage an improvement in levels of participation through offering additional services to customers.

4.2. Growth, Development and Promotion of the Sector

This set of recommendations relate to the growth and development of the sector, ensuring that communities and local authorities understand the value of marinas.

- ❖ Efforts should be made to improve relationships between marinas, local authorities and tourism organisations to improve the understanding of the value of marinas to communities, raise the profile of the sector and optimise the role of marinas as a marketing tool for the whole area. Currently, this is being viewed as a missed opportunity – by working together more closely, marinas can have an active and effective role in destination based marketing for their local community.

❖ The research suggests that a clear and comprehensive evaluation of the socio-economic value of marinas to the Channel region would benefit the sector. By promoting this information effectively, the understanding of the value of marinas and what they can add to a local community (jobs provision, direct and indirect economic input, recreational facilities, skills and training, support for local businesses) will improve.

❖ One of the key challenges to the longevity of the sector is encouraging new people to its associated sports/ activities. Marinas need to ensure they advertise to the local community, and promote themselves as being open to new members in an accessible way. The research highlighted a number of suggestions including:

- Introduction to Sailing Days,
- Open Days at marinas,
- Farmers' Markets and other community days to encourage new people to visit marinas,
- Providing a diverse range of services by being aware of customer demands and ensuring that their needs are met. This could mean, for example, ensuring that a marina site can provide activities for all age groups to enhance the value of the experience.

It should be remembered that not every activity will be suitable for every marina, and activities should be chosen based on their ability to introduce new people to the sector whilst still adding to the experience of existing customers.

4.3. Developing an environmentally, socially and economically sustainable marina sector for the Channel region.

❖ There is currently a knowledge gap in terms of marina users' understanding of environmental legislation and the responsibilities of both marinas and their customers to act as responsible stewards of the marine environment. It is possible that by furthering our understanding of this area, marinas could adapt their management plans and ensure that

customers are provided with the appropriate information in an effective way.

❖ So that marinas can provide a highly valued service to their customers, more work should be done with berth holders to ascertain what they would like to see in their marina and how the sector could add to their experiences. By having a clearer understanding of these factors, marinas would ensure they are retaining their berth holders and could work to attract new customers to the sector.

❖ Development of a Channel environmental management strategy to ensure marinas and their businesses have a thorough understanding of the environmental and planning legislation, the processes that impact them and their obligations as maritime industries.

❖ There is a need to build relationships with local authorities, making them more aware of the opportunities associated with the marina sector and its related businesses. This would foster more political support for growth and development of marinas and would strengthen their role within their local communities.

❖ Finally, the research found that identifying the opportunities for business diversification within the sector could only serve to benefit marinas. Marinas are in a prime location to take advantage of other industries, such as marine renewables, tourism etc. By working together and with their local businesses, marinas can identify their capacity for expansion and diversification.

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