

CONFERENCE REPORT



CAMIS Marina 2020: A Channel Vision for the Future

March 21st 2013, Chichester Yacht Club, West Sussex

Conference Proceedings

INTRODUCTION

The CAMIS Marina 2020 event was held at Chichester Yacht Club, West Sussex on March 19th 2013. The event was organised by the University of Chichester and Region Haute Normandie as part of the INTERREG IV A funded Channel Arc Manche Integrated Strategy (CAMIS) project. The event was well attended with the Channel's marina sector well represented by over 45 delegates, including representatives from TYHA, RYA, the Green Blue, Dean and Reddyhoff, MDL marinas, Premier Marinas, Castle Marinas, CCI Cote d'Armour, Port of Le Havre, Port of Dieppe, Cote d'Opale and a number of other independent marinas and associated businesses.

The aim of CAMIS Marina 2020 event was to identify common opportunities for growth and development within the sector, evaluating common challenges for the marina sector and fostering collaborative businesses relationships between marina stakeholders which would support the sector in a sustainable future.



SESSION 1: OPENING PLENARY SESSION

The event was opened by **Cllr Mark Dunn** of West Sussex County Council, who was introduced as a ‘great friend of the CAMIS project’. Cllr Dunn commented on the long history between the south coast of England and northern France, highlighting the Channel region as one of great importance throughout history having played a significant role in social development over the centuries. He stressed the importance of our maritime industries to the wider economy, with particular emphasis on the strength of the marina sector within the Channel region. He commented that the marina sector was “too valuable an industry for development and growth to be left to chance”, championing the need for active involvement and cooperation across the Channel region in order to ensure a long term, sustainable future for marinas in the region.

Gareth Turnbull, General Manager of The Yacht Harbour Association (TYHA) followed Cllr Dunn, further supporting the importance of encouraging collaboration across the Channel region, particularly within the marina sector. TYHA actively promote the development of best practice within the marina sector, and Gareth viewed the CAMIS Marina 2020 event as an opportunity for delegates to learn from each other, and improve existing relationships across the Channel.

Dr Emma McKinley of the University of Chichester then introduced the Marina 2020 research, conducted through the CAMIS project. The research aimed to establish a strategic vision for the future of the Channel’s marina sector, involving extensive stakeholder engagement with sector experts to identify common drivers for the sector, and examining how business clusters and diversification could be used to strengthen the sector for the future. Dr McKinley found there to be a number of key drivers considered to be important for the Channel’s marina sector, including:

- the economic down turn and the implications of rising costs associated with the sector,
- the need to increase participation, retain existing customers and attract new members to the sector,
- the impact of changing socio-demographics and customer base,
- a need to increase the understanding of the value of the marina sector to both the local community and local authorities,
- the impact of recent poor weather conditions on customer’s use of their boats and implications for long-term customer retention within the Channel region, and;
- A need to understand the balance of maritime activities and the role of marinas within this, particularly in French coastal communities.

Further to this, the research examined the potential role of clustering and improved collaboration within the Channel's marina sector, engaging with a number of cross Channel stakeholders to establish stakeholder perception of clustering, the challenges and benefits and identify examples of best practice. Three forms of clustering were identified as being applicable to the marina sector: within marina clusters, between marina clusters and cross Channel marina clusters/ networks. It was found that marinas could benefit greatly from engaging in this kind of activity, encouraging them to work more effectively as a collective, engaging with other associated organisations to promote the region through 'destination marketing' and improve relationships with the wider tourism sector. It was suggested that by working together marinas could address a number of the challenges facing their industry, and could enhance the visibility and understanding of the sector. It was clear that there were potential challenges to a clustering initiative with stakeholders expressing concerns regarding competition, historically poor relationships across the sector and the language differences across the Channel region. Additionally, the potential for marinas diversifying their business ventures to include roles in marine renewable energy generation, marine environmental research or the capacity for marinas to be an industrial hub for their communities. Throughout the presentation, Dr McKinley emphasised the overriding benefits associated with collaborative activity, and highlighted the importance of the Marina 2020 event as an opportunity for sector stakeholders to come together and being to work collaboratively towards a sustainable future.



SESSION 2:

The second session of the event was an opportunity for industry experts to present their recent work, examining the role of collaboration and networking for the wider maritime sector and evaluating ways in which the economic value of the marina sector could be better assessed and promoted.

Mr Paul Wickes from Cornwall Marine Network gave a short talk about the benefits and challenges associated with developing a successful marine cluster or network based on his experiences as CEO of CMN, with the main points being:

- The need for three necessary components for a successful maritime cluster/ network: employer champions, shared values among members and ownership for the network.
- His experiences with CMN have shown that by encouraging businesses to work together, they have a bigger 'voice' and a stronger sense of identity, factors that can be used to raise their profile within the wider market.
- By engaging with a network, companies have access to support staff, there to ensure maximum benefit for their members, access to information about their sector, as well as opportunities for development.
- Mr Wickes went on to suggest that collaboration is a powerful tool for the wider maritime sector, and that the marina sector and their associated businesses could only benefit from engaging in this type of activity.

Mr Toon Peters introduced the Transcoast Project (<http://www.transcoastproject.com/>) which highlighted the importance of maritime industries and their role in creating economically competitive and sustainable coastal communities. The main points of his talk were:

- A need to understand the regenerative capacity that can be attributed to the development of marinas, suggesting promotion of coastal and marine leisure facilities as a way of utilising facilities that are no longer used.
- Marinas to be a vital tool in regenerating their surrounding areas, as well as being a tool through which greater integration with the terrestrial communities can be achieved.
- Following this, **Mr Ronald Haagen** demonstrated the economic valuation model that has been designed as part of the Transcoast project.
- The model allows users to input details of their development, projected increases in capacity and fees and calculates the economic value of the marina development in terms of revenue per annum and jobs (FTE).



WORKSHOP ONE: Identifying commonalities across the Channel's Marina Sector

The first workshop of the day was aimed at identifying common areas of interest and difficulty across the Channel region that could be addressed in a collective way by the Channel's marina sector. Delegates were presented with five themes identified through the CAMIS Marina 2020 research, and were provided with discussion points to help guide the workshop conversations.

Themes identified and discussed throughout the workshop were:

- 1) Adapting to the challenges posed to the marina sector by economic factors, including the recent economic recession and rising costs associated with participation with the marina sector.
- 2) The importance of customer retention and identifying methods through which marinas can add value and enhance customer experience of the sector.
- 3) Increasing understanding of community and local authority sense of value and establishing ways through which links with tourism organisations can be improved, and promote the value of the sector.
- 4) The development of collaborative relationships within the marina sector on a local, regional and cross Channel scale and examine opportunities for developing clusters and business diversification within the marina sector.
- 5) Ensure the on-going environmental sustainability of the marina sector on a Channel wide basis.

The main discussion points for each theme are presented below:

Theme 1: Economic challenges

- The marine economy is generally 2-3 years behind other sectors, and will take more time to recover from the recent economic downturn than some other tourism and recreation based sectors.
- Marinas are being influenced by the lower level of disposable income available to their customers, coupled with an increase in the choice of activities available, with delegates suggesting that marinas will have to diversify facilities to retain their customers.
- An over-riding consensus that the sector needs to attract new people, including both boat users and those from surrounding towns, but questions were posed as to how best to achieve this.
- Marinas could do more to promote their potential to their local community and should exploit all customer bases more effectively by diversifying the activities they provide.
- In terms of diversification, it was important to note that because of the nature of their location, the diversification of marinas can also be dependent on physical factors and available space.
- The difference in ownership structure across the Channel means that marinas in France would need to have political support for diversification and it may not be as achievable as it is on the English side.

Theme 2: Customer retention and value of the marina sector

- The importance of listening to berth holders was discussed widely throughout the workshop.
- Marinas need to ensure there is a balance between the home and visitor berth holders, and ensure that facilities are provided for both.
- A number of suggestions and examples of existing practices were mentioned including: promotion of benefits for berth holders, including Dean and Reddyhoff's 'Recommend a Friend' scheme, regularly updating marina websites and providing berth holders with information about the local area and attractions.
- It was commented that UK marinas could benefit from more active promotion of the RYA and the activities they facilitate to build confidence and improve the value of the whole experience for berth holders.
- French marinas have more success at organising successful events and have better relationships with their local yacht clubs, something that English marinas could learn from.

- Examples were given of French yacht clubs offering introductory sailing days to attract new berth holders, having wine tasting and open days to attract local communities.
- It was also suggested that more initiatives to encourage people into sailing through charter and time share companies would be beneficial, allowing an easier, less costly introduction and on-going participation with the sector.

Theme 3: *Need to enhance understanding of the sector*

- Some work is being done in this area, with marinas producing brochures that can promote the marinas and encourage engagement with the local community.
- Delegates discussed the potential value of developing a sector specific website/ portal detailing all marinas across the Channel region, promoting potential business relationships whilst also providing customers with information about the Channel's marina facilities, with potential links to the Channel Maritime Portal being developed through CAMIS.
- The sector would benefit from enhanced and more effective collaboration with tourism organisations, perhaps requiring funding to develop this relationship and encourage involvement in local tourism initiatives.
- Active promotion of the role of marinas in their communities and building improved relationships with local tourism organisations through promotion of local attractions would have mutual benefits through encouraging visitors to extend their stay and increase their economic input into the local community.
- The sector would benefit from adopting new technologies such as developing applications for use on smart phones and tablet technology, making the sector more accessible, more convenient, and attractive to a younger generation.

Theme 4: *Development of collaborative relationships*

- There was a general sense of agreement that collaboration, and potentially building a Channel Marina Network would be of significant benefit to the marinas in the region.
- A number of potential challenges were identified and discussed by delegates.
- Cruising across the Channel was deemed a question of sailors' skills and confidence, and was something that would need to be addressed through programmes such as the RYA Active Marinas Programme and similar links to yacht clubs across the Channel.
- Other barriers discussed during the workshops included: the difference in languages across the Channel region, social and cultural differences in terms of the perception of marinas within France and England, time and availability of resources for involvement from marina

managers, perception of legislation across the Channel and lack of understanding of how this might impact the sector.

- Delegates commented that marina operators would benefit from an increased awareness of how the sector differed across the Channel, suggesting that a way of educating the sector stakeholders would be an advantage.
- For Channel wide collaboration to be successful, the importance of including the right partners for involvement was stressed through the workshop discussions, with training centres, sailing clubs, sector federations and tourism organisations suggested as having a key role to play.

Theme 5: *Environmental issues*

- Environmental issues have been identified as one of the factors most likely to impact the growth and development of the marina sector.
- Important to recognise that pollution impacting the marina sector is diverse in nature, and includes human waste, fuel, anti-fouling materials, and rubbish.
- Delegates called for a more concrete waste removal infrastructure for the sector, which some of the marinas do not currently have in place. There were also concerns expressed around the increasing risk of abandoned boats, and the need to dispose of unused boats.
- As expected the issue of dredging was common across the Channel region, with UK marinas finding the Marine Management Organisation to be an obstacle for licensing.
- It will be important to understand how this relationship can be improved and facilitated more effectively through existing channels such as the BMF and TYHA.
- The need to address the sectors carbon footprint and be viewed as a 'green' sector by both potential customers and also as a way of improving the relationship between the green lobbyists was also discussed by delegates, although no real suggestions as to how to move this forward were put forward.



Session 3: Presentations and Workshop Two

Mr Keith Martin, from the CCI Cote d'Armor talked about the development of a new marina in the town of Saint Cast, on the North West Brittany coast of France. The main points of Mr Martin's presentation were:

- Providing an example of a marina development being supported as a means of growing local community's economic potential.
- The opportunity for development when a gap was identified within the market and the local community supported the development of a marina as a way of increasing visitor numbers and therefore, economic input into the community.
- an overview of how the marina developed, the support from the local council, the funding required and the range of facilities provided by the new marina development in Saint Cast was also presented.
- The importance of developing marinas in line with environmental guidelines.

Mr Laurent Gaudez presented the recent efforts of the Basse-Normandie Nautical Sector (F2N) to develop port areas within the region.

- A lack of berths was limiting the capacity for development within the sector, and this work aimed to ensure port planning and development is considered an integral component of economic development strategies for the Basse-Normandie region.
- Marinas have played a key role in reinvigorating struggling economies, with berth numbers being increased continually, and there has been an on-going demand for more berths.
- The work has made a number of proposals including: the evaluation of new methods of financing development of the port areas, through options such as users financing berths, the adoption of new storage methods, such as dry stacking and other hard standing facilities, which can be used at a lower cost and allow marinas to gain more value from the more expensive floating moorings.
- Additionally, Mr Gaudez discussed the development of new strategies surrounding the % of berths reserved for visitors and encouraging 100% berth use by engaging with boaters through the benefit schemes, such as Passport Escales.
- The importance of strengthening the profile of marinas through collaboration and promotion of the sector was also discussed.

Mr Jean-Michel Gaigne introduced the Passport Escales project.

- Passport Escales aims to ensure operation of marinas at maximum berthing capacity, whilst encouraging boaters to cruise and use their boats more, and is currently increasing in success with over 80 marinas involved.
- This type of passport scheme is an example of where marinas can work together effectively to improve the services they are providing, enhance the value of the experience to their customers and increase revenue through improved visitor numbers.
- The scheme allows marinas to track movements within their site and to have up to date information about their berth availability for incoming visitors.
- Members of the project offer their berth holders overnight stays on other marina sites, with fees paid for by the home marina, not the customer.
- Members are provided with a membership card and often offered discounts from local businesses.

Workshop Two: Initiating concrete cooperation projects and paving the way for a Franco-British Marina Network

Through the first workshop, it was evident that there is an interest in improving understanding and collaboration across the Channel's marina sector. The second workshop aimed to identify potential actions, recommendations and suggestions for future projects to move this collaboration forward in the future. These have been grouped into thematic categories where possible.

Collaboration and clustering

The key focus of the event was to identify ways in which the marina sector could work together on a cross sector and cross Channel basis to encourage sustained growth and development. The main points were:

- Delegates were aware of the potential benefits of collaborating across the sector, and even working to establish clusters of a range of scales.
- A 'one size fits all' cluster could not be applied to the sector as a whole, and the size and location of marinas would need to be taken into consideration.
- Suggestion that the most benefit would be realised through efforts to establish clusters of small marinas and their businesses, as these are the businesses that would benefit most from the cooperative resources and knowledge exchange opportunities.

- In order to foster improved collaboration across the marina sector, it was suggested by delegates that bilingual training sessions and language training could be held in both countries, giving stakeholders the opportunity to network and build their relationships.

Promotion of the marina sector

The importance of properly promoting the marina sector, increasing its profile and using effective marketing to continue attracting new and existing customers to the sector was one of the overriding themes of the day. The main points identified through this thematic discussion were:

- The development of a website idea with region specific pages that would provide both berth holders and marina related businesses with information about the sector.
- It was also recommended that marinas should promote the local area on their websites, providing customers with information about local attractions and potentially provide discounts and advantages for visitors.
- It was suggested that marinas would benefit from more support from local tourism organisations who could be engaged to aid production of tailored information on marinas, which could be sent to France and other countries to ensure visitors have information about the Channel, marina facilities and local attractions.
- It was also suggested that there needed to be better linkages between local communities and their marinas.
- As a way of raising the profile of the Channel region, it was suggested that annual Channel events should be held, for example, rallies with stopovers in both England and France, which would increase cruising across the Channel and impact visitor numbers.
- It was recommended that marinas work more effectively within their community and engage with local clubs to arrange regattas across the Channel, such as between Newhaven and Dieppe.
- It was also suggested that there needs to be more efforts to develop best practice between marinas, shops and other associated businesses.

Environmental and planning issues

Throughout the preceding CAMIS research, and the Marina 2020 event, issues associated with the environmental and planning legislation were identified as some of the key challenges facing the sector. Discussions as to how these could be addressed raised a number of points, the main ones being:

- Marinas could benefit from linking with existing projects, such as the SETARMS project. The benefit of working with this project would be that marinas could increase their lobbying strength at a European level, and would have the backing of a project to defend the need for dredging in marinas.
- Additionally, it was suggested that more efforts could be made by existing trade associations across the Channel region, and that a coordinated voice could have a greater impact on lobbying and policy development.
- It was suggested that national trade associations and groups do not always have a detailed understanding of the local issues, and that this needed to be addressed to ensure they could represent the sector effectively at a national and European level.

Potential Barriers

As expected, delegates identified a number of barriers to successfully achieving these objectives: 1) language differences across the Channel can make communication difficult and can also mean berth holders are not confident enough to engage in cross Channel cruising, and 2) the financial issues associated with ownership and regulation differences between marinas in France and England. Marinas in France are owned by the municipality and are primarily focused on providing a service to their community, while due to predominantly private ownership in England, economic revenue and generating a profit for the business is the main concern.



Potential actions identified through Workshop Two

Through analysis of the information collected during the second workshop, it was possible to identify some potential projects or action points that could be initiated to move the goal of collaboration and effective promotion of the Channel's marina sector forward. Actions for the future included:

- Increased engagement with tourism organisations on a local, national and cross Channel basis to ensure effective promotion of the sector.
- Developing a strategy that ensures marinas are more engaged with their local community and should work to promote local attractions (through their own website and through information on the marina site), increasing their role in the overall marketing of the community.
- Development of a website that can provide both customers and businesses with information about the Channel's marina sector (information about regattas, details about marina sites, links to marina websites)
- Provision of bilingual training sessions across the Channel region to increase understanding of the different approaches to marina management and encourage knowledge exchange.
- Development of a cross Channel Marina Network that could facilitate training sessions, knowledge exchange and collaboration across the region and sector.
- Development of a Channel environmental strategy for marinas promoting best practice.
- Efforts are required to improve relationships with the national trade associations and ensure they understand the issues facing local and regional marinas. By developing this further, it is suggested that smaller marinas will have a greater voice and the profile of the whole sector on a national and European policy level.
- Twinning schemes between marinas to encourage staff exchanges, promote cruising across the Channel, improve understanding of varying approaches to marina management and promote collaboration between French and English marinas.

Key Messages, Next steps and Feeding back

The CAMIS Marina 2020 event was an excellent opportunity for marina stakeholders across the Channel region to come together to establish how the region's sector can be promoted in the future.

A number of key messages can be taken from the event:

- The Channel's marina sector is a vibrant and diverse industry across the region, and is a vital component the broader maritime sector.
- There is a clear interest in engaging in further discussion about the development of a Channel Marina Network, and significant enthusiasm for improving Franco-British relationships across the sector.
- The Channel's marina industry has clear links with the region's tourism industry, and these should be strengthened for mutual benefit across the sectors and within local communities.
- There was a clear call for strengthening collaboration across the Channel's marina sector through more effective communication, local networking actions, development of a best practice guide for those working within the marina sector and the development of a Channel website.
- The sector would benefit from the development of bilingual material for marina managers and for boaters to promote the sector. Marinas and their businesses should aim to publish information in both French and English to improve communication across the Channel region.
- There is scope to build on the current working being done by the RYA Active Marine Programme through the development of group cross Channel cruises and rallies that allow boaters to improve their skills, language knowledge and further support tourism across the Channel region.
- There are opportunities for collective lobbying in order to address the common issues facing the sector across the Channel.

Following the event, the information collected through the workshops will be collated and included in the final CAMIS Marina 2020 report, which will be disseminated to delegates and other marina stakeholders. We are interested in establishing how the actions identified during the event could be moved forward and would welcome suggestions for future INTERREG projects and other work.



Thank you for your interest and your attendance at the CAMIS Marina 2020 event. If you have any comments or would like a copy of the final research report, please contact Dr Emma McKinley on e.mckinley@chi.ac.uk.

