

Recreational Boating Industry Engagement in New England

Summary of Discussions with Industry Representatives on Ocean Planning and the
2012 Northeast Recreational Boater Survey Results

October 21, 2013

Summary Report Prepared for the Northeast Regional Ocean Council



Prepared by:



Table of Contents

Executive Summary.....	1
I. Introduction	4
II. Partners in the Industry Engagement Effort.....	5
III. Methodology.....	5
IV. Results: Feedback on Recreational Boating Issues and 2012 Northeast Recreational Boater Survey Draft Results.....	7
a) Recreational Boating Issues and Ocean Planning Efforts	7
b) Implementation of the 2012 Northeast Recreational Boater Survey & Feedback on Draft Results....	9
V. Conclusion.....	13
Appendix A: Sample Agenda and Questions for Phone Interviews with Industry Representatives.....	14
Appendix B: Workshop Details, Agenda and List of Participants.....	15
1. Massachusetts.....	15
2. Connecticut	16
3. New Hampshire.....	17
4. Maine	18
5. Rhode Island.....	19
Appendix C: Partners Involved in the 2012 Northeast Recreational Boater Survey	21

Executive Summary

As the Northeast Regional Ocean Council (NROC)¹ embarks on supporting the formal ocean planning process in New England, it is critical to determine when, where and how our coasts and ocean are used, as well as identify key issues facing marine stakeholders. SeaPlan², NROC and state coastal programs partnered to engage the recreational boating industry in acquiring data on marine recreational boating activity through the 2012 Northeast Recreational Boater Survey (2012 NE Survey) and to discuss key issues of concern to the marine recreational boating industry³. This effort is part of a larger initiative by NROC to conduct meetings and workshops with ocean users, including: recreational boating, commercial fishing, maritime commerce, aquaculture and energy sectors, to identify issues facing these industries and how they could be addressed through ocean planning.

Industry engagement occurred in three distinct phases, reflecting NROC and SeaPlan's objective to effectively work with the industry to gather data on recreational boating activity and determine issues of importance to the industry. The recreational boating industry engagement effort consisted of the following:

1. Develop and design 2012 NE Survey (November, 2011 – May, 2012);
2. 2012 NE Survey implementation (April, 2012 – November, 2012); and
3. Interpret results of the 2012 NE Survey and identify issues facing the recreational boating industry (January, 2013 – May, 2013).

For Phase 1, industry members participated in interviews and workshops, including webinars to help shape the survey goals and format, test the survey tool, and provide input on survey questions. During Phase 2, industry representatives encouraged boaters to participate in the survey by spreading the word through e-newsletters and press releases. For Phase 3, industry representatives participated in series of interviews, informational meetings and workshops to provide feedback on the draft 2012 NE survey results, highlight issues facing the recreational boating industry, and identify previous studies conducted on the recreational boating industry. More specifically, the team conducted five interviews with one to three industry representatives from each state (CT, RI, MA, NH and ME). Informed by the results of these interviews, the team convened five in-person workshops (one in each New England coastal state) with over eighty industry representatives to gather input.

¹ NROC is a state and federal partnership that facilitates the New England states, federal agencies, regional organizations, and other interested groups in determining how to best approach regional issues and coordinate activities related to ocean planning in New England.

² SeaPlan is an independent nonprofit ocean science and policy group

³ For the purposes of this effort, the marine recreational boating industry is defined as all marine-related enterprises engaged in the business of constructing, manufacturing, and/or repairing vessels; or enterprises engaged in operating shipyards, docks, marine repair shops or similar entities.

Key themes emerged from these workshops and informational sessions, including:

1. Continued access to waterways: Industry representatives stressed the desire for continued access to waterways as new ocean developments (e.g., wind farms/aquaculture) are considered. Industry representatives also stressed the need for continued maintenance and availability of shoreside facilities to enable boaters to access the water.
2. Dredging: Industry representatives noted the need to maintain waterways through dredging to ensure that recreational boating activities and related business opportunities are maximized.
3. Shore-side permitting and regulation: Industry representatives also discussed the need for greater flexibility to provide and improve shore-side infrastructure and facilities (including marina buildings, parking lots and boat ramps).
4. Economic conditions: Industry representatives identified the recent economic downturn and high cost of fuel as significant factors affecting boat ownership and the industry in general.
5. Need for facilities and policies to attract transient boating activity: Industry representatives mentioned the need for additional facilities, such as moorings and transient dockage, to attract transient boating activity.
6. Tax burden: Industry representatives expressed a range of views on how New England's varied boating tax laws affect boating activity.
7. Ocean Development Opportunities: Industry representatives are interested in the potential for economic opportunities (e.g., jobs) associated with ocean development.
8. Environmental issues: Industry representatives noted water quality and marine debris issues as two major specific concerns.
9. E15 Damage on Boat Engines: Most industry representatives encourage the U.S. Environmental Protection Agency to repeal the waiver approving the sale of E15 until more is known on the harmful effects of the blend.
10. Accuracy of the Draft 2012 NE Survey Results: Industry representatives confirmed that the NE Survey draft results generally reflect marine recreational boating activity in the region, although some representatives noted that the economic impact estimates are lower than expected and maps of recreational boating activity may need to be supplemented with other studies. Where gaps in the data exist, the industry provided comments to help ensure the results are appropriately characterized. Industry representatives also highlighted additional studies that should be conducted, including studies on the spatial extent and economic impact of: regattas, kayakers, paddleboarders, charter ("for hire") vessels, and boats registered outside of the Northeast.

The following document summarizes the input and feedback received from the marine recreational boating industry during the industry engagement effort. More specifically, the "Partners" section identifies the partners involved, and the "Methodology" section highlights the three phases of the industry engagement effort, including convening interviews and in-person workshops with recreational boating industry representatives to gather feedback and input. The "Results" section summarizes the issues of importance identified by the recreational boating industry, as well as the feedback obtained while groundtruthing the draft 2012 NE Survey results. Appendices contain the questions asked during

interviews with industry representatives, agendas and attendance lists for each of the five in-person workshops, and a complete list of partners involved in the 2012 NE Survey.

SeaPlan used the feedback received on the 2012 NE Survey maps and economic information to help characterize the data in the Final Survey Report. In addition, the results of this industry engagement effort will be used in future regional ocean planning activities. NROC and SeaPlan encourage the recreational boating industry to stay involved through attending upcoming stakeholder meetings and commenting on planning products.

NROC and SeaPlan do not endorse the views in this report that seeks to summarize the input and feedback we received. The summary is intended to capture key themes and ideas expressed by participants through the interviews and in-person workshops: their ideas, questions, suggestions, and comments. There are times when these comments may contradict one another or are stated as a certainty but may represent an opinion. Additionally, certain points provide important context but may not necessarily lead to specific regional ocean planning tasks. Participants' points and perspectives have not been fact checked. The statements do not reflect the views of NROC or the authors of this document.

I. Introduction

The National Ocean Policy, as established by Presidential Executive Order 13547, states that “robust public and stakeholder engagement is integral to a successful CMSP process.”⁴ Given the importance of human uses of the ocean to New England’s economy, culture, and society as a whole, it is critical to engage the marine industry in ocean planning efforts as the Northeast Regional Ocean Council (NROC)⁵ embarks on supporting the development of an ocean management plan for New England. Specifically, marine recreational boating activity and concurrent boating-based uses (e.g., fishing, diving) are prevalent activities throughout ocean and coastal waters in the Northeast, but limited data exist on these uses. To support regional ocean planning activities, it is important to understand when and where marine recreational boating activity occurs, as well as the key planning issues that are important to the recreational boating sector.

SeaPlan, an independent nonprofit ocean science and policy group, NROC, the First Coast Guard District, and state coastal planners engaged the recreational boating industry⁶ to gather data on marine recreational boating activity and determine key planning issues important for the recreational boating industry. This effort is part of a larger initiative by NROC to conduct meetings and workshops with key ocean users (e.g., recreational boating, commercial fishing, maritime commerce, aquaculture, and energy sectors) to determine issues of importance to each sector and which issues could be addressed through ocean planning. NROC has already convened meetings with the energy, aquaculture, and maritime commerce sectors. Summaries of these meetings can be found on the [NROC website](#).

The following document summarizes the input and feedback received from the marine recreational boating industry while 1) reviewing data on marine recreational boating activity collected from the 2012 Northeast Recreational Boater Survey (2012 NE Survey); and 2) identifying the priority issues of importance to the recreational boating industry. More specifically, the “Partners” section identifies the partners involved, and the “Methodology” section highlights the three phases of the industry engagement effort, including convening interviews and in-person workshops with recreational boating industry representatives to gather feedback and input.

The “Results” section summarizes the issues of importance identified by the recreational boating industry, as well as the feedback obtained while groundtruthing the draft 2012 NE Survey results. Appendices contain the questions asked during interviews with industry representatives, agendas and attendance lists for each of the five in-person workshops, and a complete list of partners involved in the 2012 NE Survey.

⁴ The White House Council on Environmental Quality. *Final Recommendations of the Interagency Ocean Policy Task Force*. July 19, 2010.

⁵ NROC is a state and federal partnership that facilitates the New England states, federal agencies, regional organizations, and other interested groups in determining how to best approach regional issues and coordinate activities related to ocean planning in New England.

⁶ For the purposes of this effort, the saltwater recreational boating industry is defined as all marine-related enterprises engaged in the business of constructing, manufacturing, and/or repairing vessels; or enterprises engaged in operating shipyards, docks, marine repair shops or similar entities.

II. Partners in the Industry Engagement Effort

SeaPlan and NROC worked with the following state coastal programs and federal agencies to engage industry representatives in each state:

- Maine Coastal Program
- New Hampshire Coastal Program
- Massachusetts Office of Coastal Zone Management
- Rhode Island Coastal Resources Management Council
- Connecticut Department of Energy & Environmental Protection
- New York Department of State⁷
- First Coast Guard District

The following organizations were involved in the industry engagement effort, which consisted of participating in interviews/webinars and helping to convene workshops to discuss key industry issues and review the 2012 NE Survey draft data:

- Maine Marine Trades Association
- Great Bay Marine, Newington, New Hampshire
- Massachusetts Marine Trades Association
- Rhode Island Marine Trades Association
- Connecticut Marine Trades Association

III. Methodology

In 2011, SeaPlan, NROC, the First Coast Guard District and state coastal planners worked with industry representatives to gather data on marine recreational boating activity and discuss issues of importance to the industry. This effort occurred in three phases:

- 1. Develop and design 2012 NE Survey (November, 2011 – May, 2012):** Industry representatives participated in phone calls and webinars to help shape the survey goals and format, test the survey tool, and provide input on survey questions.
- 2. 2012 NE Survey implementation (April, 2012 – November, 2012):** Industry representatives helped spread the word about the survey and encourage boaters to participate through e-newsletters, press releases, and presentations.
- 3. Interpret results of the 2012 NE Survey and identify issues facing the recreational boating industry (January, 2013 – May, 2013):** Industry representatives participated in phone calls and

⁷ Given the damage caused by Hurricane Sandy in 2012, the NY recreational boating industry was not able to partake in the marine industry engagement effort to date. Staff from the New York Department of State reviewed the draft 2012 NE Survey results, and the team is planning to conduct a webinar or in-person workshop in late 2013 to share the 2012 NE Survey results with the NY marine boating industry.

workshops to review 2012 NE Survey data and discuss issues of importance to the recreational boating sector.

Interviews: In January and February 2013, the team conducted phone calls with industry representatives from each state in New England. The team conducted five phone calls in total, each lasting approximately one hour. One to three industry representatives from each state participated in the phone calls. The purpose of the phone calls was to:

- Provide an update on regional ocean planning efforts;
- Gather initial feedback on the draft 2012 NE Survey results;
- Discuss issues of importance to the recreational boating industry that could be addressed through ocean planning efforts; and
- Gather recommendations (e.g., date, location, agenda topics, organizations to invite) for convening in-person workshops in the spring, 2013 with a larger group of industry representatives.

See **Appendix A** for the phone call script and list of questions asked.

Workshops: Building off the information collected through the phone calls, the team conducted five in-person workshops in April 2013, consisting of one workshop in each New England coastal state (ME, NH, MA, RI, CT)⁸. Over eighty industry and boating-related government agency representatives participated in the workshops, each lasting approximately two hours. See Table 1 for details on each state’s workshop.

State	Massachusetts	Connecticut	New Hampshire	Maine	Rhode Island
Date	4/1/2013	4/3/2013	4/16/2013	4/18/2013	4/23/2013
Time	1:30 PM – 3:30 PM	3:00 PM – 5:00 PM	1:00 PM – 3:00 PM	8:30 AM – 10:30 AM	2:00 PM - 4:00 PM
Location	Quincy, MA	Essex, CT	Portsmouth, NH	Brunswick, ME	Providence, RI
Number of Participants	18	15	11	12	24

Table 1: Date, Time, Location, and Number of Participants for Each State’s Workshop.

The purpose of these workshops was to:

- Provide an update on regional ocean planning activities;
- Review and gather feedback on the draft results of the 2012 NE Survey; and
- Discuss issues affecting the recreational boating industry and which could be addressed through ocean planning efforts.

See **Appendix B** for workshop agendas and list of participants.

⁸ As noted previously, the team may convene a webinar or in-person workshop with NY marine industry representatives in late 2013.

IV. Results: Feedback on Recreational Boating Issues and 2012 Northeast Recreational Boater Survey Draft Results

This section summarizes the results from the industry engagement effort, including a) input on recreational boating issues and ocean planning efforts; and b) feedback on the 2012 NE Survey draft results.

a) Recreational Boating Issues and Ocean Planning Efforts

Below is a summary of industry representatives' perspectives on the primary issues and concerns facing the recreational boating industry, some of which relate to regional or state ocean planning efforts. For some issues, industry representatives provided geographic specificity on how a particular issue affects their individual state. We provide some examples of those state specific issues, but since this document intends to summarize issues affecting the industry regionally, it does not include a comprehensive listing of recreational boating issues at the local or state scale.

1. *Continued access to waterways for recreational boaters*

Industry representatives expressed a desire to maintain and improve access for recreational boating. Comments on this theme included both access to offshore coastal and marine waters for a variety of recreational activities and access to the water via shore-side facilities. Offshore concerns included new ocean infrastructure development, potential conservation measures and safety issues due to increased interactions with other marine uses. Shore-side or near shore concerns include conversion of waterfront lands to non-marine uses and difficulties acquiring permits for improvements to marine businesses (e.g., dredging and facility expansion, as noted in #2 and #3 below).

Specific concerns and comments from the state workshops are as follows:

- In Massachusetts, the industry expressed a desire to ensure continued access for boating and fishing in Stellwagen Bank National Marine Sanctuary and areas currently under consideration for ocean energy development.
- In Connecticut, industry representatives expressed concern about losing access due to potential marine conservation activities.
- In Rhode Island, industry discussions focused on improving access to boating facilities and infrastructure.
- In Maine, industry representatives were concerned that recreational boating data may feed into determining sites for offshore wind farm developments, which may result in limited access for boaters.

2. *Continued maintenance of coastal waterways and marinas through dredging and identification of dredge disposal sites*

Industry representatives expressed a desire to ensure that waterways are adequately maintained so that recreational boating activities and related business opportunities are maximized. Participants referenced private dredging for marina improvements, timely/continued dredging of coastal waterways, and the designation of appropriate disposal sites so that dredging activities could occur. Specific concerns and comments are as follows:

- In Connecticut, industry representatives expressed a concern about the limited number of disposal sites in eastern Long Island Sound and the ongoing process for designating appropriate sites. This is an example of the larger waterway maintenance issue that industry representatives raised in each state.
- In all states, industry representatives noted dredging for local marina facilities as an ongoing issue. More specifically, industry representatives expressed concern about difficulties associated with obtaining dredging permits when expanding facilities. Industry representatives also noted the perceived large cost associated with marina dredging and lack of control over materials filling marinas.

3. *Shore-side permitting and regulation*

Industry representatives identified shore-side permitting and regulations as an ongoing concern for businesses that support or relate to recreational boating. In addition to dredging issues, industry representatives also discussed the need for greater flexibility to provide and improve shore-side infrastructure and facilities (including marina buildings, parking lots and boat ramps).

- In Maine, industry representatives stressed the importance of maintaining a variety of boating access points to ensure access for numerous boaters, rather than focusing on one large centralized access point. Maine industry representatives also noted that the lack of parking is a large limiting factor for accessing waterways.

4. *Economic conditions and interest in economic impact data*

Industry representatives identified the recent economic downturn and high cost of fuel as significant factors affecting boat ownership and the industry in general, potentially resulting in lower than normal boating activity. Industry representatives also expressed interest in demonstrating the value of recreational boating to the economy, as these estimates would be useful for policy development and business planning.

5. *Need for facilities and policies to attract transient boating activity and related revenue*

Industry representatives mentioned the need for additional facilities, such as moorings and transient dockage, to attract transient boating activity. Representatives also noted the desire to simplify the foreign vessel reporting process⁹ to encourage visits from international vessels.

6. *Tax Burden*

Industry representatives expressed a range of views on how New England's varied boating tax laws affect boat purchases, storage, docking, interstate economic activity, and offshore boating activity.

- Some Massachusetts boat owners may register and store their boats in tax-free states (e.g., Rhode Island, New Hampshire) to avoid the Massachusetts' sales tax and excise

⁹ Industry representatives noted that foreign vessels often have a lengthy reporting process, potentially deterring vessels from visiting U.S. ports.

tax. This may result in a loss of revenue for some Massachusetts' communities, and an increase in boating traffic in those other states.

- In Connecticut, industry representatives were discouraged by additional taxes on boating-related activities.

7. *Potential new economic opportunities associated with offshore development*

The potential for offshore renewable energy development was identified by industry representatives as a potential economic opportunity for some marinas and marine trade job seekers.

- In Maine, industry representatives noted that offshore developments would require a skilled maritime work force, support vessels, dockage, and a variety of services that could enhance business opportunities.

8. *Water Quality and Marine Debris*

Industry representatives noted that environmental issues could negatively impact recreational enjoyment and, in turn, marine businesses. Industry representatives noted water quality and marine debris issues as two major specific concerns.

9. *E15 Damage on Boat Engines*

Use of ethanol-blended gasoline, such as E15 gasoline, in boats can produce considerable damage to boat engines. Most industry representatives encourage the U.S. Environmental Protection Agency's to repeal the waiver approving the sale of E15 until more is known on the harmful effects of the blend.

b) Implementation of the 2012 Northeast Recreational Boater Survey & Feedback on Draft Results

SeaPlan, in partnership with NROC, the First Coast Guard District, and state coastal planners, worked with the recreational boating industry to design and conduct the 2012 NE Survey. For a comprehensive list of partners involved in the 2012 NE Survey, see **Appendix C**. Building off the successes of the [2010 Massachusetts Recreational Boater Survey](#), the 2012 NE Survey collected spatial and economic data on marine recreational boating activity in the Northeast (including New York, Connecticut, Rhode Island, Massachusetts, New Hampshire, and Maine). The surveying period lasted from May through October, 2012 and over 12,000 boaters in the Northeast participated.

Final results from the survey include: the economic impact of marine recreational boating to each state and the Northeast; maps displaying important areas for recreational boating; demographic characteristics of the recreational boating community; and boaters' opinions on relevant issues. The survey results fill a need identified by NROC and state coastal planners to develop a better understanding of how and where humans use the ocean. Survey data can serve a variety of purposes,

including supporting regional ocean planning efforts, demonstrating the value of marine recreational boating, and enhancing industry business planning.

The industry was involved in every phase of the development and implementation of the 2012 NE Survey. Once the draft 2012 NE Survey results were complete, industry representatives provided the following feedback, categorized by: 1) maps of boating activity, 2) economic impact data, 3) additional ways to analyze the data, 4) complementary studies to conduct, and 5) additional comments. Specific feedback can be found below:

1. Maps of Boating Activity

The study team shared draft recreational boating maps from the 2012 NE Survey with industry representatives, including maps of boating routes and boating-based activities (e.g., recreational fishing, diving) identified by recreational boaters using an online mapping tool. In general, industry representatives agreed that the maps accurately represent boating and related activities in the Northeast, with a few specific exceptions. Industry representatives noted the following potential limitations when viewing the data:

- **Straight boating routes:** In general, industry representatives agreed that the boating routes presented in the maps are fairly accurate, as most boaters take direct routes from a starting point to a destination. It should be noted that, while the survey instructions stated that survey participants should plot their *entire* boating route, some survey participants may have only plotted a straight route to and from a destination; thereby the data would not show areas where boaters drift or tack while sailing. Boaters often drift and transverse all coastal waters, meaning that all coastal waters could be colored “red” depicting high boating activity. Furthermore, the survey may not capture boats that frequent an area and drift back and forth over the area forty times to trawl.
- **Representation of major transit routes:** While the data convey most of the major transit routes in the Northeast, Massachusetts industry representatives noted that some major transit routes in MA are not represented. SeaPlan is currently working with the Massachusetts Marine Trades Association to collect expert opinion on the major transit routes in MA, and these data could be used to supplement the 2012 NE Survey data in Massachusetts ocean planning efforts.
- **Internet survey:** Since the survey occurred online, it is possible that the survey did not capture boaters that are not comfortable with online mapping applications, or did not have access to the internet during the summer period.
- **Data gaps/surprises:** Table 2 displays the data gaps and surprises noted by industry representatives when viewing the maps.

State	Data Gaps/Surprises
Maine	*Boating activity between Rockland and Mt. Desert Island is higher than expected *Boating activity between NY and ME is underrepresented
New Hampshire	*None noted
Massachusetts	*Boating activity south of Nantucket and Martha's Vineyard is underrepresented *Fishing activity in Stellwagen Bank is underrepresented
Rhode Island	*Offshore wreck diving sites are underrepresented (sites can be found in the RI SAMP) *Boating activity near Newport is underrepresented since data do not include races
Connecticut	*None noted
New York	*None noted (no industry engagement workshop held to date; potential webinar or workshop in late 2013)

Table 2: Data gaps/surprises identified by industry representatives regarding spatial data collected through the 2012 Northeast Recreational Boater Survey.

2. Economic Impact Data

While industry representatives expressed positive feedback regarding the methodology, results, and the economic data collected through the survey, industry representatives in ME, MA, RI and CT noted that the overall economic impact of marine recreational boaters' spending and the number of "year-round jobs" supported by marine recreational boaters' spending seems *underestimated*. When interpreting the economic impact estimates, it is important to fully understand the methodology and what the estimates include, associated limitations and caveats for the economic analysis¹⁰, as well as the definition of "year-round jobs"¹¹, as that helps explain why the estimates may be lower than expected. For more details on the methodology, see the [2012 Northeast Recreational Boater Survey Technical Report](#).

3. Additional Ways to Analyze Data

Industry representatives provided different ways that the survey team could analyze and present the spatial data. Industry representatives suggested that the data could be analyzed in the following ways:

- Size class of vessel

¹⁰ The economic analysis includes saltwater recreational boaters' spending on: Monthly trip-related spending: money associated with a trip on the water (e.g., fuel, groceries, launch fees); Monthly visit-related spending: money associated with a visit to the boat (e.g., maintenance, groceries); Yearly expenditures: money not associated with a trip on the water or visit to the boat (e.g., taxes, insurance, storage).

The economic analysis does not include: Recreational boaters' spending on a new or used boat; Freshwater recreational boaters' spending; Charter or "for hire" vessels; Expenditures made by recreational boaters with boats registered outside of the Northeast

¹¹ One year-round job is equivalent to one full time job lasting twelve months. Similarly, two jobs lasting six months each equal one year-round job, three jobs lasting four months each equal one year-round job.

- Number of boating miles traveled by size class of vessel
- Routes taken by trailered boats vs. mooring-based/docked boats
- Routes that involve a “stop-over” in a different state (e.g., route that began in RI and stopped-over in CT)
- Monthly or seasonal activity

4. Complementary Studies to Conduct

While the 2012 Northeast Recreational Boater Survey collected a wide-range of data on marine recreational boating activity, the study was designed to be focused on marine recreational boaters in the Northeast. Additional studies should be conducted to fully understand the breadth of marine recreational boating activity. Industry representatives noted that data should be collected on the following items:

- The spatial extent and economic impact of recreational boating events (e.g., regattas, fishing tournaments, kayakers, and paddleboarders).
- The economic impact and spatial activity of marine recreational boating from boats registered outside of the Northeast. One industry representative noted that to conduct this type of study, it would be useful to work with boatyards, marinas, and the Marine Trades Association to encourage participation.
- The spatial extent and economic impact of charter (“for hire”) vessels.

5. Additional Comments

Industry representatives made a number of additional noteworthy comments that did not fall under the above categories, some of which are state-specific. Comments included:

Maine

- These data will be useful to verify assertions from facilities that request money on the basis that the facilities are commonly used for recreational purposes.
- These data could also be used to prioritize boating areas for spending or upkeep.
- Harbormasters could distribute additional surveys to gather boating activity information when they send out mooring application renewals.
- Maine has an aging population, which could affect boating habits and patterns.
- Data collected through this survey confirm what we already intuitively knew about marine recreational boating patterns, but it is helpful to have data to support our assumptions.
- The types of activities occurring in marine waters may vary during different times of year (e.g., lobster boat races, Windjammer Days in Boothbay Harbor).

Rhode Island

- This study has a strong narrow focus of registered recreational boaters, which is very useful and a distinct benefit of the study.

Connecticut:

- Data on recreational boating activity would have been useful during the review of Broad Water LNG terminal. Broad Water proposed a large barge in the middle of Long Island Sound, and there was little information on recreational boating activity to help with siting issues.
- The average age of survey participants seems high. Prior age estimates were close to 54 years old.

V. Conclusion

Through engaging the recreational boating industry in each New England state, we collected useful information from the industry to inform regional ocean planning efforts and help review and characterize the 2012 NE Survey results. Regarding issues of importance to the industry, most industry representatives stressed the desire for continued access to waterways as ocean development efforts (e.g., wind farms/aquaculture) are potentially sited. While most industry representatives were cautious about ocean development, some industry representatives noted the potential for economic opportunities (e.g., jobs) associated with ocean development. Other commonly noted concerns of the recreational boating industry include dredging issues and shoreside permitting and regulation.

In general, industry representatives confirmed that the 2012 NE Survey draft results accurately reflect marine recreational boating activity in the region. Where gaps in the data exist, the industry provided comments to help ensure the results are appropriately characterized. Industry representatives also stressed that additional studies should be conducted to ensure other sectors of the boating industry are represented in ocean planning efforts. Additional studies could include: the spatial extent and economic impact of regattas, kayakers, paddleboarders, charter (“for hire”) vessels, and boats registered outside of the Northeast.

SeaPlan used the feedback received on the 2012 NE Survey maps and economic information to help characterize the data in the Final Survey Report. NROC is using the feedback on issues of importance to the recreational boating industry when developing draft goals for a regional ocean plan. NROC and SeaPlan encourage the recreational boating industry representatives to remain involved in regional ocean planning efforts.

Appendix A: Sample Agenda and Questions for Phone Interviews with Industry Representatives

- I. Background and Introduction**
 - a. Purpose of the call
 - b. Who is SeaPlan/NROC?
 - c. Background on ocean planning in the Northeast
 - d. Update on 2012 NE Recreational Boater Survey
 - e. Plan for industry engagement and scheduling
 - f. Discuss opportunities for industry partnership
- II. Ocean Planning and Recreational Boating Issue Area Questions**
 - a. What are the primary issues and concerns facing the recreational boating industry? (in your local area and in Northeast region)
 - b. What do you want to see achieved through ocean planning in New England?
 - i. [if needed] Such as existing opportunities, conflicts or uncertainties?
- III. Data and Information on Recreational Boating**
 - a. Presentation and Input on SeaPlan Recreational Boating Survey Data
 - i. Share preliminary maps of raw 2012 Northeast Survey data & gather initial reactions
 - ii. Provide overview of economic and demographic data collected
 - b. What other data exists about recreational boating and related activities that are important to your industry?
 - i. Spatial data (Near shore: launches, marinas; offshore: no discharge areas, other boating activity studies)
 - ii. Economic data (Most recent economic estimates in your state, other)
 - iii. Boating and tourism stats
- IV. Next Steps, Identification of Industry Stakeholders, and Partnering**
 - a. Would you be willing to attend an upcoming webinar where we present the survey data and a workshop where we spend time discussing the appropriate use of the data and boating related planning issues?
 - b. Who are the key people or organizations that we should invite to the webinar and workshop?
 - c. What are the most effective ways to inform these individuals about the workshop?
 - d. It would be best to partner with a group in your state to promote and help host the workshop. Who would be the most appropriate organization?
- V. Questions/comments**
 - a. Do you have any other questions, comments, or advice, including about our current approach to engage the industry?

Appendix B: Workshop Details, Agenda and List of Participants

1. Massachusetts

Details:

Coastal Boating in the Northeast: Massachusetts Industry Workshop

Monday, April 1, 2013 from 1:30 PM - 3:30 PM (EDT)

Granite Links Golf Club at Quarry Hills, The Boardroom, 100 Quarry Hills Drive, Quincy, MA 02169

Agenda:

- | | |
|---------|--|
| 1:15 PM | Registration and Refreshments |
| 1:30 PM | Introductions and Welcoming Remarks
<i>Facilitator, Andy Lipsky, SeaPlan</i> |
| 1:45 PM | Regional Ocean Planning and MA Ocean Management Plan: Update and Discussion
<i>Nicholas Napoli, Northeast Regional Ocean Council</i>
<i>Bruce Carlisle, Massachusetts Office of Coastal Zone Management</i>
<i>Questions and Discussion</i> |
| 2:15 PM | 2012 Northeast Recreational Boater Survey Draft Results
<i>Kimberly Starbuck, SeaPlan</i>
<i>Maps: Q & A</i>
<i>Economic Analysis: Q & A</i> |
| 3:15 PM | Closing and Next Steps
<i>Andy Lipsky, SeaPlan</i> |
| 3:30 PM | Adjourn |

Participants:

1. Barbara Burr, Burr Brothers Boats
2. Bill Latta, Massachusetts Boating and Yacht Clubs Association
3. Bruce Carlisle, Massachusetts Office of Coastal Zone Management
4. Captain Lou, Nautical Talk
5. Carolyn Belmore, U.S. Coast Guard & National Boating Federation
6. Cheryl Chisholm, Massachusetts Boating and Yacht Clubs Association
7. Clark Goebel, Bass River Marina, West Dennis MA
8. Jamy Madeja, Buchanan Associates
9. Larry Russo, Sr, Russo Marine
10. Marie Hayward, New England Marine Documentation
11. Mark Lacey, City of Gloucester Waterways Board
12. Nathalie Grady, Massachusetts Marine Trades Association
13. Peter Gilson, Massachusetts Boating and Yacht Clubs Association
14. Prassede Vella, Massachusetts Office of Coastal Zone Management
15. Steve Chase, Bosun's Marine
16. Ted Chisholm, Massachusetts Boating and Yacht Clubs Association
17. Tim Leedham, Bosun's Marine
18. Tony Gross, City of Gloucester Waterways Board

2. Connecticut

Details:

Coastal Boating in the Northeast: Connecticut Industry Workshop
Wednesday, April 3, 2013 from 3:00 PM – 5:00 PM (EDT)
CT Marine Trades Association, 20 Plains Road, Essex, CT 06426

Agenda:

- 2:45 PM Registration and Refreshments
3:00 PM Introductions and Welcoming Remarks
Facilitator, Andy Lipsky, SeaPlan
Grant Westerson, CT Marine Trades Association
Brian Thompson, CT Department of Energy and Environmental Protection
3:15 PM Regional Ocean Planning Update and Discussion
Nicholas Napoli, Northeast Regional Ocean Council
Questions and Discussion
3:45 PM 2012 Northeast Recreational Boater Survey Draft Results
Kimberly Starbuck, SeaPlan
Maps: Q & A
Economic Analysis: Q & A
4:45 PM Closing and Next Steps
Andy Lipsky, SeaPlan
5:00 PM Adjourn

Participants:

1. Ben Duarte, U.S. Coast Guard
2. Brian Thompson, CT DEEP
3. Brooks Moody, Brewer Yachts
4. Chuck Beck, State of CT Office of Maritime
5. Dana Hewson, Mystic Seaport
6. Dawn Schieferdecker, Essex Island Marina
7. Eleanor Mariani, CT DEEP Boating Division
8. Grant Westerson, CT Marine Trades Association
9. Jeff Dziedzic, TowBoat US Mystic/New London
10. Lee Deer, Three Belles Marina
11. Mark Chanski, CT DEEP Boating Division
12. Mark Passeri, A & S Boats
13. Matt Fritz, CT DEP
14. Sylvain De Guise, University of Connecticut
15. Yolanda Cooley, CT DEEP Boating Division

3. New Hampshire

Details:

Coastal Boating in the Northeast: New Hampshire Industry Workshop

Tuesday, April 16, 2013 from 1:00 pm - 3:00 pm (EDT)

NH Coastal Program, NHDES Office, Pease Tradeport, 222 International Drive, Suite 175, Portsmouth, NH

Agenda:

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| 12:45 PM | Registration and Refreshments |
| 1:00 PM | Introductions and Welcoming Remarks
<i>Chris Williams, New Hampshire Coastal Program</i> |
| 1:15 PM | Regional Ocean Planning and RI Ocean SAMP: Update and Discussion
<i>Nicholas Napoli, Northeast Regional Ocean Council</i>
<i>Questions and Discussion</i> |
| 1:45 PM | 2012 Northeast Recreational Boater Survey Draft Results
<i>Kimberly Starbuck, SeaPlan</i>
<i>Maps: Q & A</i>
<i>Economic Analysis: Q & A</i> |
| 2:45 PM | Closing and Next Steps
<i>Kimberly Starbuck, SeaPlan</i> |
| 3:00 PM | Adjourn |

Participants:

1. Chris Williams, NH Coastal Program
2. Dave Kellam, SeaPlan
3. Edward Comerford
4. Ellen Saas, Great Bay Marine
5. George Korn
6. John Glessner, Kittery Point Yacht Yard
7. Kevin Hanlon
8. Mike Bunyar, Great Bay Marine
9. Robert Fields
10. Tom Brown
11. Tracy Shattuck, Division of Ports and Harbors

4. Maine

Details:

Coastal Boating in the Northeast: Maine Industry Workshop

Thursday, April 18, 2013 from 8:30 AM - 10:30 AM (EDT)

Southern Maine Community College, Maine Advanced Technology and Engineering Center, Room 246
124 Admiral Fitch Ave, Brunswick, ME

Agenda:

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| 8:15 AM | Registration, Coffee and Refreshments |
| 8:30 AM | Introductions and Welcoming Remarks
<i>Susan Swanton, Maine Marine Trades Association</i>
<i>Matthew Nixon, Maine Coastal Program</i> |
| 8:45 AM | Ocean Planning Update and Discussion
<i>Nicholas Napoli, Northeast Regional Ocean Council</i>
<i>Questions and Discussion</i> |
| 9:15 AM | 2012 Northeast Recreational Boater Survey Draft Results
<i>Kimberly Starbuck, SeaPlan</i>
<i>Maps: Q & A</i>
<i>Economic Analysis: Q & A</i> |
| 10:15 AM | Closing and Next Steps
<i>Kimberly Starbuck, SeaPlan</i> |
| 10:30 AM | Adjourn |

Participants:

1. Barry Acker, The Landing School
2. Ben Davis, True Course Yachting, Inc.
3. Brian Marcaurelle, Maine Island Trail Association
4. Cameron Sheets, USCG
5. George Powell, Maine Department of Agriculture, Conservation & Forestry, Boating Facilities Program
6. Jason Curtis, Portland Yacht Services
7. Jay Pinkham, Freeport Harbormaster
8. Joe Burke, Points East Publishing
9. Matt Nixon, Maine Coastal Program
10. Susan Swanton, Maine Marine Trades Association
11. Stephen Melville, USCG
12. Tom Kay, Shellfish Warden, Assistant Harbormaster

5. Rhode Island

Details:

Coastal Boating in the Northeast: Rhode Island Industry Workshop
Tuesday, April 23, 2013 from 2:00 PM to 4:00 PM (EDT)
Save the Bay, 100 Save the Bay Drive, Providence, RI 02905

Agenda:

- 1:45 PM Registration and Refreshments
- 2:00 PM Introductions and Welcoming Remarks
Facilitator, Andy Lipsky, SeaPlan
- 2:15 PM Regional Ocean Planning and RI Ocean SAMP: Update and Discussion
Nicholas Napoli, Northeast Regional Ocean Council
Jen McCann, RI Coastal Resources Center & RI Sea Grant/Grover Fugate, RI Coastal Resources Management Council
Questions and Discussion
- 2:45 PM 2012 Northeast Recreational Boater Survey Draft Results
Kimberly Starbuck, SeaPlan
Maps: Q & A
Economic Analysis: Q & A
- 3:45 PM Closing and Next Steps
Andy Lipsky, SeaPlan
- 4:00 PM Adjourn

Participants:

1. Chris Tompsett, US Navy/Department of Defense Representative on NE RPB
2. Dave Monti, Fishing columnist and charter captain
3. David Ford, Third Rail Technologies/Herreshoff Marine Museum/Explore Bristol Marine Working Group and Town of Bristol Maritime Center Advisory Group
4. Dick Cromwell, Freedom Boat Club
5. Don Vivencio, Point Judith Marina
6. Drew Carey, CoastalVision
7. Edward G. LeBlanc, U.S. Coast Guard
8. Fredk C. Bieberbach, Jr., AMS, RIMTA & Bravo Marine Associates
9. Grover Fugate, Coastal Resources Management Council
10. Hank Kniskern, Roger Williams University
11. Jeff Rasmussen, Boater/Member of Save the Bay
12. Jeffrey Tortorella, Narragansett Bay Commission
13. Jen McCann, URI Coastal Resources Center and RI Sea Grant
14. John Fitzpatrick, Roger Williams University
15. Ken Court, Jackie Sea Charters
16. Matt Gineo, Oldport Marine Services, Inc.
17. Monique LaFrance, URI
18. Paul Harden, RIEDC

19. Rich Hittinger, RI Saltwater Anglers
20. Robin Wallace, RI State Yachting Committee
21. Sheila McCurdy, Cruising Club of America
22. Steve Medeiros, RI Saltwater Anglers Association
23. Tom Kutcher, Save the Bay
24. Wendy Mackie, RI Marine Trades Association

Appendix C: Partners Involved in the 2012 Northeast Recreational Boater Survey

The 2012 NE Survey was conducted through a partnership involving the boating industry, government, and non-governmental organizations. This partnership was involved in all phases of the project, from developing the methodology to reviewing preliminary results.

SeaPlan, an independent nonprofit ocean science and policy group, worked with the following partners to conduct this survey:

State & Federal Agency Partners: *Agency staff that provided input and guidance on the overall format, shape and context of the study. More specifically, they assisted in acquiring state boat registration databases, provided feedback on the mapping application and survey questions, conducted outreach to encourage boaters to participate, and reviewed draft results.*

- Northeast Regional Ocean Council
- Maine Coastal Program
- New Hampshire Coastal Program
- Massachusetts Office of Coastal Zone Management
- Rhode Island Coastal Resources Management Council
- Connecticut Department of Energy & Environmental Protection
- New York Department of State
- First Coast Guard District

Technical Consultants: *Experts contracted by SeaPlan to assist with the technical aspects of the survey, including the development of survey questions, developing and programming the survey and online mapping application, and entering data from the Recruitment Survey returns.*

- Ecotrust
- Center for Survey Research, University of Massachusetts Boston
- Urban Harbors Institute, University of Massachusetts Boston
- University of New Hampshire Survey Center
- Dan Hellin Consulting
- Marine Consulting Services

Industry Associations: *Industry representatives assisted in every phase of the study, including survey development and testing, encouraging boaters to participate, and reviewing the draft results to help characterize the study appropriately.*

- Maine Marine Trades Association
- Rhode Island Marine Trades Association
- Connecticut Marine Trades Association
- National Marine Manufacturers Association
- Sailors for the Sea
- Massachusetts Boating and Yacht Clubs Association