Report

on

RECREATIONAL BOATING FACILITIES IN THE NATION

to the

President's Commission on Americans Outdoors

Washington, D.C.

by

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Background

The National Marine Manufacturers Association (NMMA) estimated that in 1984 there existed 5,789 recreational boating facilities in the US (4,489 marinas and boatyards, 1,300 yacht clubs). No figures were available as to the new and increasing number of condominium marinas ("dockominiums") in existence. The total recreational fleet last year was estimated to include 13.49 million boats used by 62.17 million Americans who spent approximately $12.34 billion at the retail level. (source: MAREX-NMMA as reported in Boating Industry Magazine, January, 1985)

The Sport Fishing Institute surveyed the state governments and identified a total of 11,762 fishing and boating access area publicly acquired by the end of 1982. Of those 7,585 were public launching ramps (from: SFI Bulletin No. 353, April, 1984).

Sea Grant researchers in universities in Rhode Island and 26 other states have studied various recreational boating issues and have developed educational programs with many marine trade associations. From that process, I have identified over the past sixteen years some common patterns and trends in recreational boating:

- In most states, more people participate in boating than in other kinds of recreational water uses (except for beach going and swimming).

- The boat provides a means for many different recreational uses beyond "just going boating"; these include: offshore sport fishing, tourist travel, nature study, wilderness access, camping, hunting, racing, siteseeing state/national parks and scenic rivers, and visiting historic settlements (most are on navigable waterways).

- The economic impact of the recreational boating sport and its industry is often greater in most coastal states than is commercial fishing or commercial maritime shipping. In addition to economic impact, boating adds considerable value to the quality of life while making very few demands on the tax resources of a waterfront community.

- The business of boating is big, yet the retail and marina level is largely made up of very small companies, including many "mom and pop" operations. They generally provide very good services but at prices below that considered to be a reasonable return on investment. This is unusual since most boating areas report that marina slip demand exceeds supply.

• Marina facilities, both public and private, are major public access points to recreational waters; a fact not generally understood by government planners and regulatory agencies. I see these facilities as the "narrow neck of an hourglass". One side is filled with the people wanting boating access, plus the industry supplying boats and products. The other side contains the nation's recreational waters. The marinas and launching ramps are at the narrow neck. As those points expand or contract, so directly does public access. I submit that marinas, even privately owned, are providing important public access and are in the nation's interest to encourage.

• Increasing competition for shore ownership is pressuring "water dependant" uses (ie: marinas and boatyards) to be sold and converted into "water enhanced" uses (ie: condominium housing), thus potentially reducing public access to the water. This trend is gaining further momentum (ie: Florida, Connecticut and Massachusetts) especially where local tax accessors value marina land at its highest use value vs present water dependant use. This is similar to the transformation of farm land into suburban development.

• Environmental regulatory constraints in some states have severely curtailed maintenance dredging of existing marinas. When boats can no longer safely enter and leave a marina basin, marina management options narrow: service smaller boats, delay expansion, resort to "midnight dredging", sell into land development, or go out of business. In addition, the opportunity for constructing new facilities has greatly deminished.

• There are two major areas where boating access can easily expand, if encouraged. First, decayed urban waterfronts recycled to provide sites for marina development next to large population areas (look at waterfronts in Baltimore, Boston, Chicago, New Orleans, San Franscisco, Seattle) could open up over 10,000 new boat slips in the next decade. Second, the majority of marinas in the US, within water and land areas now developed for boating, can expand their capacity to service more boats and people. Through the use of more efficient dock plans, stack storage systems, and general modernization of facilities, I project that a 10-30% national expansion is possible.

National Inventory of Recreational Boating Facilities Established

Last May, the University of Rhode Island's Sea Grant Marine Advisory Service received a grant from the National Marine Manufacturers Association to establish and maintain a verified national inventory of all the recreational boating facilities in the United States. This new national data base includes all identified public and private marinas, boatyards, dockominiums, and yacht clubs. It now serves as a statistical reference source for industry, government, and academic users.

Phase I - Compilation of Boating Facilities Lists

The first phase of the national inventory of recreational boating facilities was completed in September, 1985, and is in the process of being field verified. The inventory counted 10,669 facilities, a 54% increase of the industry's 1984 number. A summary report will be published by the NMMA. The data base remains at URI for maintenance and Sea Grant research use.

The current inventory was compiled from recreational boating facility lists available to URI (including cruising guides, boating almanacs, state boating guides, Sea Grant marina lists, etc.). Some state lists were complete, up-to-date, and detailed; other states (especially inland) had poor to no lists available. In many areas there were more "unknown" than "known" data available, thus making local details blurred. Some state files are suspected to have duplication, while others may have big holes. Inaccuracies and omissions will be corrected in Phase 2, the field verification stage of this project. I urge caution on using individual state numbers from the Phase I report, however, the national numbers and relationships probably are reasonably good and can be used. In general, I expected that the national totals will probably increase.

This preliminary national report provides the boating industry and the nation with far more data on boating facilities in the United States than has ever been available before. In a complimentary study, the US Department of Agriculture's Forest Service is currently conducting an inventory of all launching ramps. Between the two inventories, state, regional, and national patterns of boating access should become apparent from comparative analysis of both sets of final numbers.

URI Sea Grant
National Recreational Boating Facilities Inventory

1985 Preliminary Data*

Recreational Boating Facilities Identified	Count	Percent
Marinas & boatyards	7,405	69
Yacht clubs	867	8
Dockominiums	40	0.4
Parks	691	6
Unknown	1,666	15.4
Total	10,669	100

Facility Ownership	Count	Percent
Private	8,290	78
Public	1,301	12
Unknown	1,078	10

Facility Management	Count	Percent
Private	8,317	78
Public	1,242	12
Unknown	1,110	10

Type of Water Access	Count	Percent
Freshwater rivers & lakes	5,388	51
Saltwater bays, estuaries, coastal	3,958	37
Unknown	1,323	12

Storage Capacity	Count	Projected
Slips, boat	402,674	832,182
Moorings, boat	35,380	170,704
Land storage spaces, boat	138,297	522,781
Launching ramps, boat **	3,273	10,669
Auto parking spaces	109,574	906,865

* Preliminary totals from the University of Rhode Island's National Recreationa Boating Facilities Inventory - Phase 1, subject to change after Phase 2 field verification.

** This inventory includes only boat launching ramps found in the marinas, yacht clubs, etc., but not public launching ramps found outside of those facilities.

Phase 2 - Field Verification Project

The purpose of Phase 2 is to improve the accuracy and usefulness of the Phase 1 data through direct contact to verify that the facilities do exist. Research staff will contact each and every recreational boating facility in the nation by telephone to:

1. Check the accuracy of the Phase 1 inventory list,
2. Expand the data base (i.e. waterway name, number of slips, services, ownership, employees, sales volume, numbers of ramp lanes, etc.),
3. Provide an opportunity for data base maintenance.

It is anticipated that local and regional field verification will be primarily done by Sea Grant Marine Advisory Services in key boating regions. The information will be entered into the national data bank at the University of Rhode Island with analysis estimated to be completed by June 1986.

Examples of Anticipated Users of Inventory Data

- The boating industry and national sport fishing groups - to plan boating access and facility development priorities,
- Economists - to more accurately understand the economic importance and role of the marina industry,
- Coastal planners - to identify changes and trends in uses of the shoreline,
- State agencies (i.e. fish & wildlife, environmental management) - to identify gaps and plan expansion of boating access with facility construction through use of federal Wallop-Breaux/Dingell-Johnson Fund,
- Tourist-travel agencies - to prepare and maintain accurate guides to boating and fishing resources,
- President's Commission on Americans Outdoors - to compare geographic patterns for boating facilities to the distribution of US population, recreational water resources, and government role.
- Sea Grant research and advisory programs - to study impacts of coastal recreation and as a mailing list for educational programs.

Future plans for the National Recreational Boating Facilities Inventory include supplementary Phases 3 and 4, to expand and further refine the data base into more detailed and useful information.

Phase 3 could provide national data base information through contractual services to industry, governmental agencies, and Sea Grant researchers. For example, URI's computer could select a random national or regional sample of the marina facilities for surveying expansion potential, dredging needs, and constraints. The 1985-86 data will be a comprehensive reference point in time for measuring future changes and trends.

Phase 4, for example, might begin an ongoing national survey, become a polling device for industry, and publish an annual marina industry profile. The continual maintenance of the Inventory is critical, and will be built into every level of use.