

# **Great Lakes Recreational Boating Economic Benefits Study**

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John Glenn Great Lakes Basin Program

# Great Lakes Recreational Boating Economic Benefits Study

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- Sec. 455 (c) WRDA '99: "...the Secretary...shall submit to Congress a report detailing the economic benefits of recreational boating in the Great Lakes basin, particularly at harbors benefiting from operation and maintenance projects of the Corps of Engineers."

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- Objective: Support federal interest in maintenance of recreational harbors
- Methodology: Use of National Boater Panel to generate unprecedented data on boater spending levels and patterns

# Great Lakes Recreational Boating Economic Benefits Study

## Watercraft Registration

Great Lakes States						
	# of Boats 2003	# of Boats 2002	# of Boats 2001	# of Boats 2000	# of Boats 1999	% Change
Illinois	360,252	398,431	369,626	372,162	372,618	-3.3%
Indiana	216,145	218,363	218,255	219,189	229,778	-5.9%
Michigan	953,554	1,000,337	1,003,947	1,000,049	985,732	-3.3%
Minnesota	845,379	834,974	826,048	812,247	793,107	6.6%
New York	528,094	529,732	526,190	525,436	524,326	0.7%
Ohio	413,048	413,276	414,658	416,798	407,347	1.4%
Pennsylvania	355,235	357,729	359,525	359,360	352,231	0.9%
Wisconsin	610,800	619,124	575,920	573,920	562,788	8.5%
All Great Lakes States	4,282,507	4,371,966	4,294,169	4,279,161	4,227,927	1.3%
All Other States	8,414,500	8,414,476	8,517,638	8,439,109	8,457,924	-0.5%

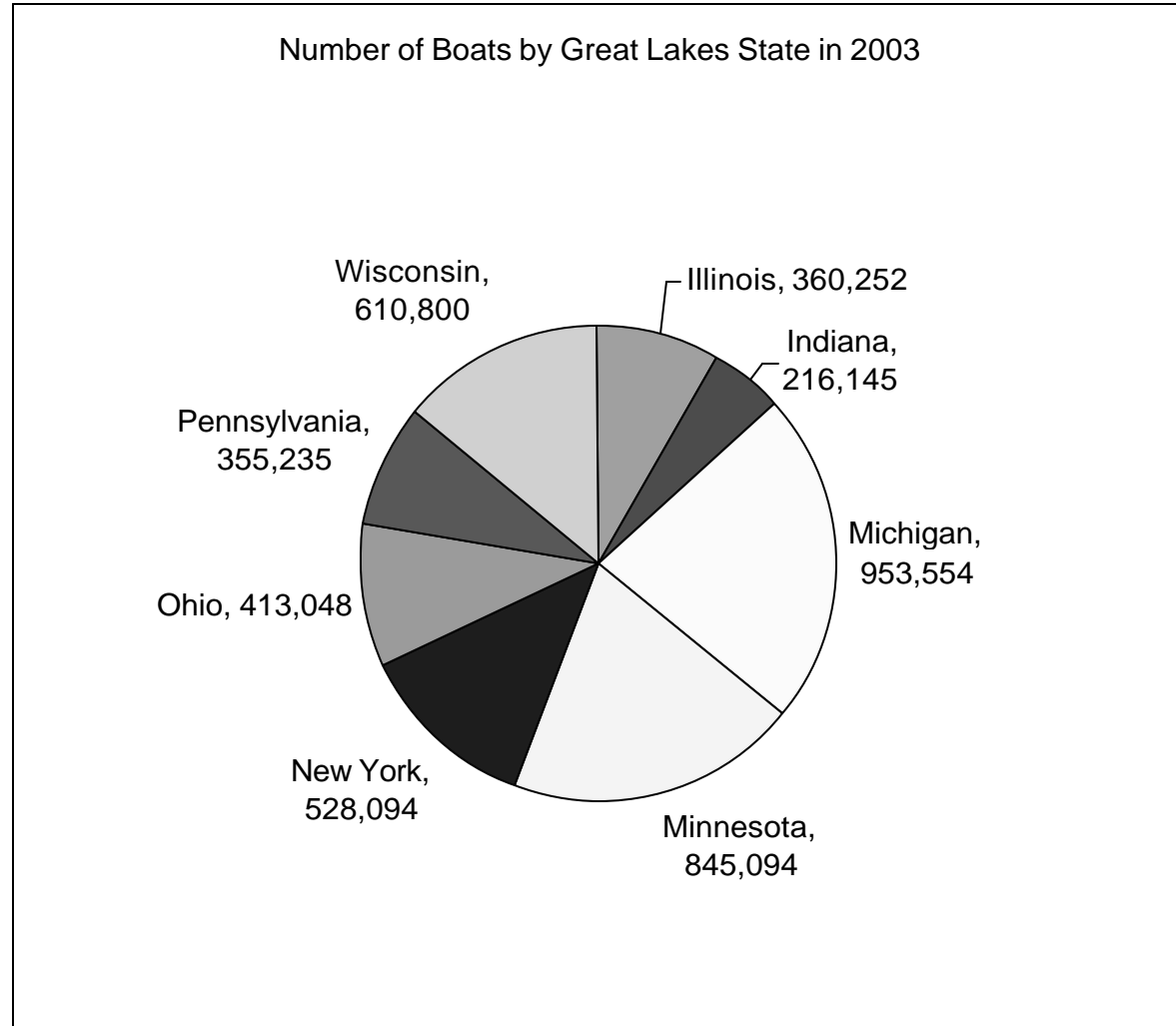
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Most popular type: 16' to 24' fiberglass runabout

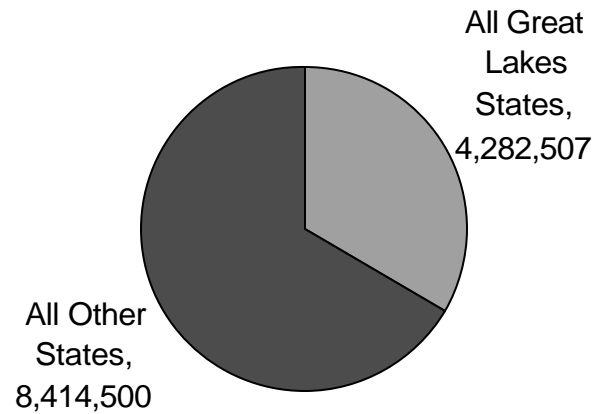


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**Number of Boats in 2003**



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## Marina Slips

State	Number of Slips		Percent		Seasonal Slips		Occupied seasonal slips		
	Statewide	GL Slips	GL	Pct Seasonal Slips	Statewide	GL Slips	Occ. Rate	Statewide	GL Slips
Illinois	19,118	8,487	44%	97%	18,544	8,232	93%	17,246	7,656
Indiana	9,101	2,883	32%	86%	7,827	2,479	93%	7,279	2,306
Michigan	64,368	54,056	84%	85%	54,713	45,948	93%	50,883	42,731
Minnesota	8,990	607	7%	93%	8,361	565	93%	7,775	525
New York	83,491	18,047	22%	91%	75,977	16,423	93%	70,658	15,273
Ohio	55,646	39,915	72%	85%	47,299	33,928	93%	43,988	31,553
Erie County (PA)	10,378	824	8%	100%	10,378	824	93%	9,652	766
Wisconsin	11,247	8,287	74%	85%	9,560	7,044	93%	8,891	6,551
<b>Total</b>	<b>262,339</b>	<b>133,106<sup>a</sup></b>	<b>51%</b>	<b>89%</b>	<b>232,659</b>	<b>115,442</b>	<b>93%</b>	<b>216,373</b>	<b>107,361</b>

<sup>a</sup>Slips in marinas in Great Lakes counties. This includes slips in Great Lakes adjacent zip codes.

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**Economic impact from marinas: Case study**

**Tower Marine, Saugatuck-Douglas, Michigan**



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## **Economic impact from marinas: Case study**

- At the marina studied, 395 boats renting slips spent \$2.85 million on annual craft expenses and another \$2.85 million on boating trips in 2004.
- Direct economic impacts of trip spending was \$1.8 million in sales, \$661,000 in wages and salaries and \$952,000 in value added, supporting 37 jobs.
- Annual craft expenses directly supported an additional 44 jobs from \$2.6 million in direct sales, \$834,000 in wages and salaries and \$1.5 million in value added.

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## **Economic impact from marinas**

- There were 110,000 boats kept at Great Lakes marinas in 2003, the majority in Michigan and Ohio. These boats spent \$665 million on trip-related expenses and \$529 million on craft-related items.

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## **Manufacturing and sales of rec boats**

- Residents of Great Lakes states represent almost a quarter (23.6 percent) of the 2003 nationwide purchases of new power boats, outboard motors, trailers and accessories.
- Retail boat sales in Great Lakes states in 2003 totaled \$2.025 billion.
- It is estimated that 182,700 watercraft were manufactured in 2003 by the 250 manufacturers with headquarters in Great Lakes States and that watercraft manufacturers in the Great Lakes states employ 18,500 persons.

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## **Charter boat fishing impact**

- Charter captains in the Great Lakes spend an average of \$10,568 annually on operating expenses for a total of \$20.72 million.
- The direct and secondary impacts of charter fishing on Great Lakes communities is approximately \$61 million in sales, \$25 million in salaries and wages and \$37 million in value added.
- The total employment impact of charter fishing in Great Lakes states is 1, 266 jobs.

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## Recreational boater spending

- An average Great Lakes boat owner spends about \$3,600 per year on their boat including \$1,400 on craft-related expenses (e.g., equipment, repairs, insurance, slip fees) and \$2,200 on boating trips (e.g., gas and oil, food, lodging) involving an average of 23 boat days.
- The greatest trip expenses are for boat fuel (22%), restaurants and bars (17%) and groceries (14%); The majority of annual craft expenses are for equipment (39%), maintenance and repair (29%) and insurance (14%).

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## Recreational boater spending

- Registered watercraft in Great Lakes states spent almost \$10 billion on boating trips in 2003 and \$5.7 billion on craft expenses for a total of almost \$16 billion.

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## Recreational boater spending

- Direct economic impact of registered boats on Great Lakes states' economies include almost \$11.5 billion annually in sales, \$4 billion in personal income and \$6.4 billion in value added, for a total of over \$22 billion.

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## Total economic impact on state economies

	<b>Sales \$ Millions</b>	<b>Jobs</b>	<b>Personal Income \$ Millions</b>	<b>Value Added \$ Millions</b>
<b>Trip Spending</b>	<b>\$11,592</b>	<b>162,391</b>	<b>\$3,873</b>	<b>\$4,769</b>
<b>Annual Craft Spending</b>	<b>\$7,455</b>	<b>83,725</b>	<b>\$2,605</b>	<b>\$4,486</b>
<b>Trip and Craft Spending</b>	<b>\$19,047</b>	<b>246,117</b>	<b>\$6,479</b>	<b>\$9,255</b>

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## Recreational boater spending

- At 50 recreational harbors in Detroit and Buffalo districts, there was an estimated 750,000 cubic yards of material to be dredged in FY '05 for which funding was not available.
- The cost: \$7.6 million.



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