

Science, Service, Stewardship



Special Studies

National Ocean Recreational Expenditures Survey

Rosemary Kosaka, SWFSC

Scott Steinback, NEFSC

Cindy Thomson, SWFSC

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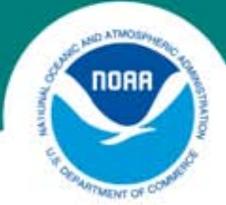
What is the purpose of this study?

- To learn more about the relationship between people, ocean recreation activities, and the impact these activities have on regional and national economies.
- NMFS firsts
 - An expenditure survey that will collect information on a broader range of ocean activities
 - A web-based method of data collection (pending OMB approval)



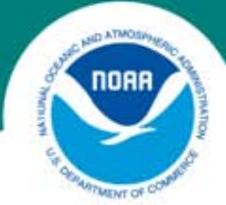
Ocean recreation categories

- Recreational fishing
- Recreational shellfishing
- Hunting waterfowl or other animals
- Viewing or photographing ocean features and wildlife
- Beachcombing, tidepooling, or collecting items
- Water contact sports (swimming, surfing, diving, jet skiing, etc.)
- Boating and associated activities (sailing, kayaking, wake boarding, tubing, etc.)
- Outdoor activities not including water contact



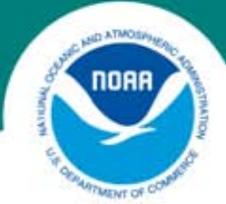
Data to be collected

- Participation – within last 12 months
- Effort – within last 2 months
- Expenditures
 - Durables – within last 12 months
 - Semi-durables – within last 2 months
 - Recent trip – within last 2 months
- Anticipated changes in recent trip activity relative to temperature changes



What we've done so far

- Focus groups, paper-based
 - Charleston (April 2010)
 - Seattle (May 2010)
 - New Orleans (May 2010)
- Cognitive interviews, web-based
 - San Francisco (June 2010)
 - San Diego (June 2010)
 - Boston (August 2010)



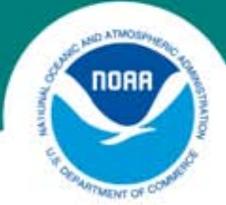
Current status

- Working it's way through OMB...
 - May 2011: PRA submitted to OMB
 - July 2011: Questions from OMB?
- Anticipated timeline (pending OMB approval)
 - Pre-test, 2011: implement in September (for July/Aug) or November (for Sept/Nov)
 - Full survey, 2012: wave 1 in March (for Jan/Feb)



Why conduct this study?

- Back in 2007-ish, questions were being asked in elevators and hallways at HQ about ocean activities beyond recreational fishing.
 - How big was their contribution to national and regional economies?
- To help answer these musings, this study was conceived by the NMFS' Economics & Social Sciences Program...
 - ... and initiated in Sept 2009.



Relative to recent reports

- Interagency Ocean Policy Task Force report (July 19, 2010)
- NOAA's Next Generation Strategic Plan (December 2010)



How is this study different from past studies?

- Past surveys that are similar:
 - NMFS' National Marine Recreational Expenditure Survey
 - FWS' National Survey on Fishing, Hunting, and Wildlife-Associated Recreation
 - USFS and NOAA/NOS' National Survey on Recreation and the Environment (NSRE)



Comparison with other national recreation surveys

Survey	Year	Federal agency	Sample frame	Mode of data collection	Response rate
Saltwater Angler Expenditure Surveys	2006	NOAA/NMFS	Lists created from anglers intercepted at public access sites	In-person and telephone interviews, mail survey	40% (mail), 62% (in-person)
National Survey of Fishing, Hunting, and Wildlife-Associated Recreation	2006	USFWS	Census Bureau's master address file (MAF) and the Current Population Survey (CPS)	In-person and telephone interviews	90%
National Survey of Recreation and the Environment <i>(all survey modules)</i>	2002-2008	USFS, NOAA/NOS	Phone list provided by Survey Sampling, Inc.	Telephone interviews	19-20%
National Survey of Recreation and the Environment <i>("lifestyle" module only)</i>	2000	USFS, NOAA/NOS	Phone list provided by Survey Sampling, Inc.	Telephone interviews	51-55%



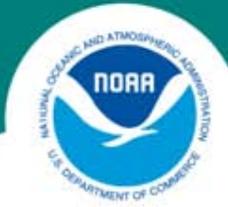
Survey methods and sampling

- Mode of collection: online survey
- Sample frame: Knowledge Networks' web-enabled research panel (~32,000 households)
- Sampling strategy:
 - Collect 12 months of information (participation, effort, expenditures)
 - 6 waves, each wave to collect information for the past 2 months
 - Stratified by region (6 regions)



Regions to be sampled

Stratum or Region	States, including District of Columbia	# of households, KN research panel	% of households, KN research panel	% of households, 2000 Census
Pacific	AK, WA, OR, CA, HI (5)	5,708	17.4%	14.9%
New England	ME, NH, VT, MA, RI, CT (6)	1,567	4.8%	5.1%
Mid-Atlantic	NY, NJ, PA, DE, MD, VA, DC (7)	5,481	16.7%	19.1%
South Atlantic	NC, SC, GA, FL (4)	3,771	11.4%	13.3%
Gulf of Mexico	AL, MS, LA, TX (4)	3,199	9.8%	11.2%
Inland states	ID, NV, UT, AZ, NM, MT, WY, CO, ND, SD, NE, KS, OK, IA, MO, AR, TN, KY, WV, MN, WI, IL, MI, IN, OH (25)	13,078	39.9%	36.4%
Total	51	32,804	100%	100%



Anticipated participation in ocean recreation

Stratum	KN stratum size	Estimated # responses	Estimated 12-month participation rate	Estimated # of KN survey respondents who recreated in past 12 months
Pacific	5,708	3,996	59%	2,358
New England	1,567	1,102	65%	716
Mid-Atlantic	5,481	3,837	50%	1,919
South Atlantic	3,771	2,640	58%	1,531
Gulf of Mexico	3,199	2,239	37%	828
Inland states	13,078	9,155	24%	2,197
--	32,804	22,969	43%	9,549



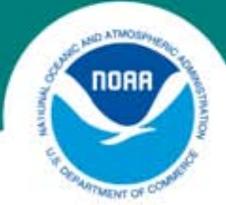
No data yet...

- ... but when we get it, it will be awesome.
- Again, we're collecting regional and national:
 - Participation (number of people, last 12 months)
 - Effort (number of days, last two months)
 - Expenditures (durables, semi-durables, recent trip)
 - Some info related to recent trip activity and temperature variability



What kinds of results do we expect?

- Expected results
 - Ocean recreation estimates for all activities (combined) – national and regional
 - Ocean recreation estimates for each category – national, possibly regional
 - Comparison between our annual participation estimates with NMFS' and maybe FWS' estimates
- Results we hope to get
 - State level estimates for larger states (CA, FL, TX)
 - How temperature changes effect activity participation



Will this study be repeated?

- Too early to tell
 - Again, this study is new in terms of the range of ocean recreation activities and the use of the web.
 - This study could spawn ideas for other, more regionally-specific studies related to ocean recreation.
- Stay tuned...