5 FORECAST OF DEMAND

The purpose of this chapter is to prepare updated forecasts of demand for the infrastructure associated with various recreational activities supported by the Port of Bellingham. Forecasting is a key element in the planning process. Forecasts of activity presented in this chapter are to be used as guidelines for the formulation of long range development plans for improvements to serve recreational activities. It is important, therefore, for managers and administrators to know how many people participate in a given recreation activity, and how this measure could change over time.

Participation in various outdoor activities can be affected by changes in population, available sites and infrastructure, lifestyles, economics, technology and the politics of land use. With an understanding of these characteristics and use of the best available data, this plan makes a best estimate of change in recreation patterns to assist with determining future Port outdoor recreational needs.

5.1 National and Regional Trends

National and regional data on outdoor recreation trends is available through the National Survey on Recreation and the Environment (NSRE). Participation in most outdoor activities have increased in the first decade of the 21st century. In this study an individual is said to have participated in an outdoor recreation activity if he reported engaging in that activity at least once in the preceding 12 months. Participation is a general indicator of the size of a given market and can be indicative of relative public interest. Regional participation rates and predictions, by NSRE for selected outdoor recreation activities are listed below in the following table.

Participation Rates Ages 16 and Older 2005-2009	United States		Percent Change (%Δ) 1999-2001 To 2005-2009	Pacific Coast Region	
	Participants *(thousands)*	Percent %		Participants *(thousands)*	Percent %
Walk for Pleasure	199,998.3	85.0	+13.9	33,128.3	87.7
View/photograph natural scenery	149.818.0	63.7	+17.9	25,686.1	67.9
View/photograph birds	84,072.4	35.7	+22.8	12,916.5	34.3
View/photograph fish	63,492.2	27.0	+21.4	10,909.5	28.9
View/photograph other wildlife	118,059.2	50.2	+25.4	17,706.9	46.9
Visiting a Beach	101,968.2	43.3	+20.7	20,092.4	53.1
Visit waterside besides beach	56,515.2	24.0	+6.3	10,313.2	27.3
Motor-boating	55,018.0	23.4	+8.6	7,627.7	20.3
Canoeing	22,794.9	9.7	+18.2	2,432.5	6.5
Use Personal watercraft	21,145.1	9.0	+10.9	3998.0	10.6
Kayaking	14,210.5	6.0	+103.8	2,817.3	7.4
Sailing	10,395.9	4.4	-0.4	2,255.8	5.9
Rowing	9,384.6	4.0	+8.9	1,301.7	3.5
Windsurfing	1,376.7	0.6	-10.1	238.7	0.6

Figure 13: National and Regional Participation by Activity
(Cordell, 2012)

Socioeconomic Trends

Race and ethnicity are important determinants of what people chose as outdoor recreation activities and settings. Similar to race/ethnicity, people's age and economic status also affects recreation choices.

Viewing and photographing nature — Overall, almost three-fourths of Americans participate in one or more of the activities making up this activity group. People with higher education and incomes have higher participation rates than the general population. Non-Hispanic Whites, people ages 35 to 54, those having some college to post graduate education, and those earning more than $25,000 per year participate in nature viewing and photography at higher rates than others. Participation rises consistently with income. There is little difference in participation rates between males and females or between urban and rural residents. Less likely to participate are Black or Hispanic people, people ages 65 and older, people with a high school education or less, and people earning under $25,000 per year.

Viewing and photographing nature

Demographic strata	View or photograph natural scenery	View or photograph wildflowers, trees, etc.	View or photograph other wildlife	View or photograph birds
All people age 16+	63.7	51.6	50.2	35.7
Male	62.3+ *	47.3+ *	51.6+ *	33.5+ *
Female	64.8*	55.4*	48.9*	37.7*
White	68.8+ *	55.2+ *	56.2+ *	40.1+ *
Black	43.9*	37.6*	31.1*	25.9*
American Indian	67.2	55.5	54.5	39.5
Asian or Pacific Islander	67.5**	51.9	39.2*	25.7*
Hispanic	56.3*	46.4*	42.3*	25.9*
Age 16-24	59.0+ *	44.8+ *	47.2+ *	21.8+ *
Age 25-34	64.4	47.3*	51.6***	28.2*
Age 35-44	73.1*	57.8*	58.2*	39.0*
Age 45-54	71.5*	58.7*	56.4*	43.1*
Age 55-64	66.4*	55.9*	51.5	42.4*
Age 65+	49.7*	45.5*	38.2*	37.9*
Less than high school	43.7*	39.4+ *	40.0+ *	24.7+ *
High school graduate	60.0*	46.7*	47.2*	34.1*
Some college	72.2*	57.0*	55.4*	39.5*
College degree	78.6*	63.0*	57.7*	43.3*
Postgraduate degree	82.4*	67.4*	61.9*	48.4*
<$15,000	47.3+ *	40.8+ *	38.0+ *	30.3+ *
$15,000-$24,999	55.4*	47.3*	43.7*	32.3*
$25,000-$49,999	66.5*	52.7	53.0*	37.1**
$50,000-$74,999	74.5*	58.4*	60.2*	39.9*
$75,000-$99,999	78.1*	59.7*	61.4*	40.9*
$100,000-$149,999	80.8*	62.6*	63.8*	44.4*
$150,000+	80.3*	62.9*	63.5*	43.7*
Non-metro resident	63.1	52.2	57.5+ *	36.9+++
Metro area resident	63.8	51.4	48.6*	35.5
U.S. citizen	64.0+	52.0+	50.9+ **	36.0+
Foreign born	56.6*	42.2*	33.7*	30.5*

Figure 14: National Demographic Strata –Viewing and Photographing Nature

(Cordell, 2012)

Participating in motorized outdoor activities— Motorized outdoor activities include motor boating, off highway vehicle driving, snowmobiling, using personal watercraft, and waterskiing. Overall, about 36 percent of the U.S. population participated in one or more of this group of activities in 2005-2009. Participation rates are highest among males, non-Hispanic Whites, people under the age of 55 years (especially younger people), people with some college or a college degree, middle-to-high income people, and rural residents. Less likely to participate in these outdoor activities relative to their numbers are females, Blacks, Asians, people ages 55 and older, urban residents, and people with lower education and income.

Motorized activities

Demographic strata	Motorboating	Driving off-road	Using personal watercraft	Waterskiing	Snowmobiling
All people age 16+	23.4	20.6	9.0	9.0	4.5
Male	27.3+ *	26.5+ *	10.1+ *	10.9+ *	5.9+ *
Female	19.7*	15.1*	8.0*	7.4*	3.3*
White	29.4+ *	22.5+ *	10+ *	10.7+ *	5.3+ *
Black	6.4*	10.5*	4.0*	2.0*	1.4*
American Indian	15.8*	26.1***	5.9***	4.1*	3.7
Asian or Pacific Islander	12.2*	7.0*	7.0**	6.0*	0.9*
Hispanic	15.9*	24.4*	10.0**	9.3	4.7
Age 16-24	26.6+ *	32.6+ *	18.6+ *	19.4+ *	7.3+ *
Age 25-34	25.9*	28.9*	11.9*	13.3*	8.1*
Age 35-44	28.3*	26.2*	10.7*	12.0*	5.8*
Age 45-54	27.3*	19.8	7.5*	7.6*	4.0
Age 55-64	21.3*	12.6*	4.4*	3.3*	2.3*
Age 65+	13.3*	7.7*	2.5*	0.8*	1.0*
Less than high school	15.1+ *	20.3+	7.6+ *	7.3+ *	3.5+ *
High school graduate	22.1*	22.6*	8.6	8.0*	5.0***
Some college	26.6*	22.4*	9.7**	10.2*	5.6*
College degree	30.8*	18.1*	11.0*	11.5*	4.1
Postgraduate degree	28.9*	13.5*	8.4	9.6	3.4**
<$15,000	10.3+ *	13.2+ *	4.6+ *	4.0+ *	2.4+ *
$15,000-$24,999	14.3*	14.0*	4.3*	3.6*	5.3
$25,000-$49,999	22.2**	22.2**	8.2**	7.1*	4.2
$50,000-$74,999	30.7*	23.2*	11*	11.4*	5.8*
$75,000-$99,999	34.9*	27.2*	12.6*	13.8*	5.6**
$100,000-$149,999	37.0*	26.6*	14.0*	14.8*	5.6***
$150,000+	43.7*	26.2*	18.6*	22.5*	8.9*
Non-metro resident	25.6+ *	28.4+ *	7.8+ *	8.6	6.6+ *
Metro area resident	22.9***	19.0*	9.2	9.1	4.1**
U.S. citizen	24.0+ **	20.8+	9.1+	9.2+	4.5
Foreign born	9.2*	16.9**	5.9*	4.2*	5.6

Figure 15: National Demographic Strata –Motorized Activities

(Cordell, 2012)

Participating in non-motorized boating activities— Non-motorized boating activities include canoeing, kayaking, rafting, rowing, and sailing. Generally, just over 20 percent of Americans participated in some form of non-motorized boating in 2005-2009. Participation rates are high relative to the general population for males, non-Hispanic Whites, people ages 16 to 44, people with some college to postgraduate education, and high-middle to high income people. Urban residents and native born people are just slightly more likely to participate. Less likely than the population to participate in non-motorized boating are females, Blacks or Hispanics, people 55 or older, the lower income groups, rural residents, and people with no college education.

Non-motorized boating					
Demographic strata	Canoeing	Rafting	Kayaking	Sailing	Rowing
All people age 16+	9.7	7.9	6.0	4.4	4.0
Male	11.4+ *	8.4+ **	6.8+ *	4.4	4.8+ *
Female	8.1*	7.5***	5.4*	4.5	3.2*
White	12+ *	9.2+ *	7.2+ *	4.8+ **	4.8+ *
Black	3.0*	2.8*	1.5*	2.4*	1.2*
American Indian	5.8**	5.6	1.5*	3.1	1.4**
Asian or Pacific Islander	8.7	6.6	7.5**	4.6	4.0
Hispanic	5.9*	7.4	4.7*	4.3	3.1*
Age 16-24	18.5+ *	15.2+ *	11.3+ *	6.2+ *	5.6+ *
Age 25-34	10.4***	10.3*	5.9	4.9***	3.7
Age 35-44	12.2*	10.1*	6.8**	4.5	4.6**
Age 45-54	10.0	7.9	6.9**	4.9***	4.5***
Age 55-64	6.4*	3.9*	4.5*	4.0	3.4***
Age 65+	2.3*	1.4*	1.7*	2.2*	2.3*
Less than high school	6.9+ *	6.2+ *	3.8+ *	2.7+ *	2.7+ *
High school graduate	8.1*	7.1**	3.9*	2.1*	3.5**
Some college	9.5	8.7*	5.7	4.7	4.6*
College degree	14.2*	9.7*	10.5*	7.9*	4.9*
Postgraduate degree	16.0*	9.6*	12.8*	10.4*	5.7*
<$15,000	4.8+ *	5.3+ *	3.2+ *	1.9+ *	2.9+ *
$15,000-$24,999	6.7*	5.4*	2.5*	2.3*	3.1**
$25,000-$49,999	8.7**	7.4	4.0*	3.2*	3.9
$50,000-$74,999	12.4*	9.7*	7.6*	4.2	5.1*
$75,000-$99,999	15.2*	12*	9.4*	5.2***	4.4
$100,000-$149,999	16.0*	10.4*	11.8*	8.6*	5.3*
$150,000+	16.1*	14.2*	14.6*	15.4*	6.0*
Non-metro resident	10.3+++	7.7	4.3+ *	2.1+ *	4.0
Metro area resident	9.6	7.9	6.4**	4.9*	4.0
U.S. citizen	9.8+	8.1+	6.1	4.4	4.1+
Foreign born	5.9*	3.6*	5.1	4.8	1.7*

Figure 16: National Demographic Strata –Non-Motorized Boating

(Cordell, 2012)

National Growth Projections

Within this section, national outdoor recreation participation projections developed through 2060 for certain outdoor recreation activities or activity composites are provided.   In this study,

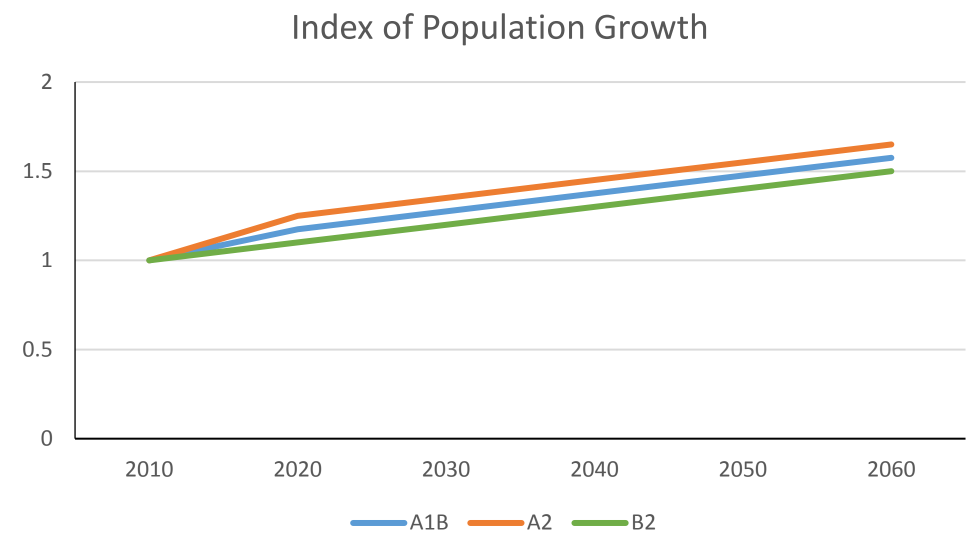

Figure 17: National Index of Population Growth

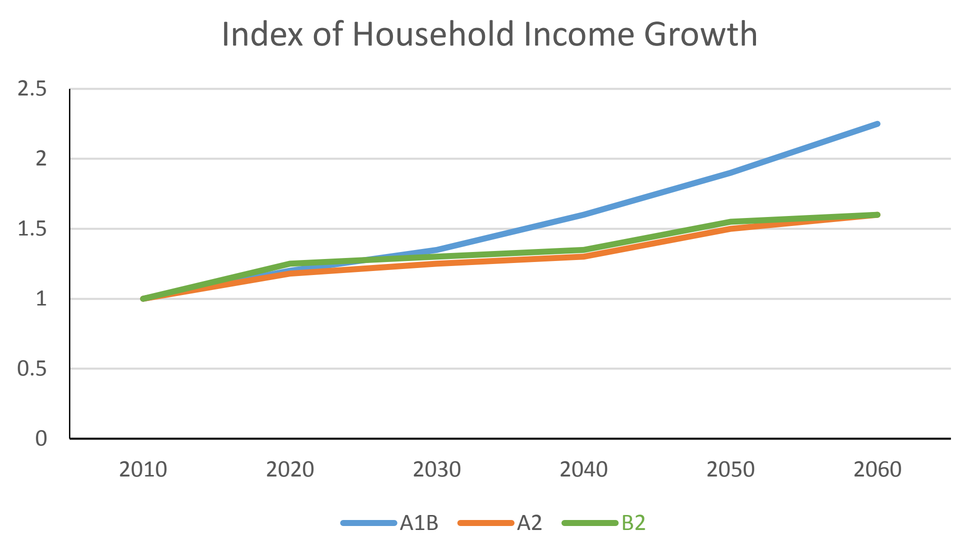

Figure 18: National Index of Household Income Growth

(Bowker, 2012)

A1B corresponds to mid-range population growth and the highest average personal and household income level of the three scenarios. Scenario A2 projects the highest population growth and the lowest projected average personal and household income. Scenario B2 projects the lowest population growth and mid-level personal income.

Motorized Water Activities – motor-boating, waterskiing, or using personal watercraft 2020-2060

Indexed per capita participation (from 2008 baseline)					
Scenario	2020	2030	2040	2050	2060
A1B	1.022	1.025	1.051	1.094	1.154
A2	0.986	0.966	0.96	0.965	0.976
B2	1.018	0.99	0.991	1.008	1.006

Figure 19: National Index Per Capita Participation for Motorized Water Activities

(Bowker, 2012)

Motorized water activities including the NSRE activities of motor boating, waterskiing and personal watercraft use has the highest per capita participation rate of all motorized activities (26 percent). Under assessment scenario A1B, per capita participation is expected to grow by 15% over the next 5 decades to about 30 percent of all adults, while under scenarios A2 and B2 growth will essentially be static. Income growth under A1B is the biggest factor in causing the greater per capita growth. Overall, the number of adults participating in motorized water activities increases faster than the population under scenario A1B. With per capita participation constant under both A2 and B2, the number of motorized water activity participants mirrors population growth.

Non-Motorized Water /Floating Activities – canoeing, kayaking or rafting 2020-2060

Indexed per capita participation (from 2008 baseline)					
Scenario	2020	2030	2040	2050	2060
A1B	0.986	0.96	0.967	0.993	1.031
A2	0.957	0.914	0.896	0.891	0.89
B2	0.983	0.935	0.926	0.935	0.928

Figure 20: National Index Per Capita Participation for Non-Motorized Water Activities

(Bowker, 2012)

Floating activities had an annual adult participation rate of nearly 17 percent from 2005 to 2009, which amounted to about 39 million participants nationwide in 2008. Across the growth assessment scenarios, the participation rate is expected to increase slightly for A1B to over 17 percent annually by 2060. For each of the lower income scenarios, the rate of participation for adults is expected to drop by between 7 and 11 percent over the next five decades, with scenario A2 dipping to 15 percent participation rate. With these changes in participation rates, floating participants under A1B are projected to increase 62 percent, or slightly more than the population, while scenarios A2 and B2 will grow slightly less than their respective population growth rates.

5.2 STATE TRENDS

The recreation economy of Washington State is vast. Walking, hiking, biking, birding, boating, fishing, hunting, swimming, skiing, 4-wheeling, horse riding, snowboarding, sail boarding, whale watching—Washingtonians head out on weekends and weekdays for healthy fun engaging in hundreds of recreational activities all across Washington State from local parks to wilderness areas and the open ocean. The state's rich outdoor recreation choices also provide jobs to many families and businesses. A January 2015 study sponsored by the Washington State Recreation and Conservation Office quantifies the contribution of outdoor recreation to Washington State's economy and way of life.

The benefits of Washington's outdoor recreation industry go beyond supporting jobs to include creating a way of life. It is estimated that Washingtonians, on average, spend 56 days a year recreating outdoors. According to the recreation surveys and public land records used in this study, there were a total of about 446 million participant days a year spent on outdoor recreation in Washington, resulting in $21.6 billion dollars in annual expenditures.

Expenditures were highest for recreation associated with public waters. Water recreation includes a number of activities with high trip and equipment expenditures, especially motorized boating. Ranking second were special events such as sports tournaments and races, which generally involve fees and attract overnight stays. Ranking third was recreation on private lands, which includes expensive recreation activities such as golf, skiing, and off-highway vehicle riding and hunting, which often occur on private timberland. Local parks are the most common place for people to visit as well as the most accessible and least costly destination.

(Earth Economics, 2015)

An independent assessment of Washington State boaters' needs submitted to the Washington State Recreation and Conservation Office prepared by Responsive Management in 2007 made the follow 10 conclusions:

1. LACK OF FUNDING: There is a clear, immediate need for additional funding for boating programs and services in Washington.
2. ADDITIONAL AND ALTERNATIVE SOURCES OF FUNDING: In order to meet some of the numerous recreational boating needs additional funding will be required and examination of potential funding alternatives was recommended.
3. BOATER SAFETY: Among providers, boater safety was the top rated program or service, as well as being the top area in which providers would like to direct more time and money.
4. BOATING ACCESS: Providers and boaters alike consider access to be one of the central needs affecting recreation boating in Washington.
5. LAUNCHES AND FACILITY UPKEEP: Both providers and boaters feel strongly that the maintenance of existing access sites and launch ramps is as important of a concern as development of new sites and launch ramps.
6. LAUNCHES AND FACILITY DEVELOPMENT: There are numerous facilities and services that both boaters and providers would like to see more of in the respective areas. Parking at launch ramps (72%) and launch ramps themselves (69%) were the top items providers would like to see more of, followed by docks (63%), pumpout stations (63%), restrooms at launch ramps (62%), courtesy tie-ups (62%), dump stations (58%), and mooring buoys (53%).

7. COORIDINATION OF AGENCY ADMINISTRATION IN WASHINTON: Multiple agency involvement in administering boating services and boating programs have led to the perception among both providers and various agency employees that boating services and boating programs are fragmented.
8. INCREASE LAW ENFORCEMENT PRESENCE and STANDARDIZE ENFORCEMENT TRAINING: While boater safety and law enforcement had high ratings among providers, the majority of boating providers indicated that more time and money should be directed to them.
9. INCREASE INFORMATION AND EDUCATION PROGRAMS: In general, the development of boating information and education programs should be treated as an ongoing process of providing boaters beneficial information, with mandatory boater safety education serving as just the beginning.
10. RCO GRANT PROCESS: It was recommended that the RCO use the results of this study (particularly the data on improvement priorities and the preferred locations for service additions) to set priorities for the Boating Facilities Program and Boating Activities Program.

(Responsive Management, 2007)

5.3 LOCAL TRENDS

Economic Contribution

The value of consumer outdoor recreation spending should not be underestimated. In fact, the amount of consumer spending on outdoor recreation clearly demonstrates the importance of continued investment in recreational lands. As the 2015 Economic Contribution of Outdoor Recreation to Whatcom County report has shown, annual consumer outdoor recreation spending in Whatcom County totals $705 million. Total economic contributions to the Whatcom County economy amount to $585 million every year. These expenditures and their impacts support 6,502 jobs in a variety of industries including the hospitality and restaurant industries. Not only is recreation an important part of why people choose to live in Whatcom County, it is also a foundation of the local economy. Additionally, Whatcom's recreation industries (such as gear manufacturers and boat builders), including their suppliers and related economic activities (total direct, indirect and induced effects), have a significant impact on the local economy. These industries account for over $389 million in business output and support 3,728 recreation business jobs.

In addition to the monetary contribution of outdoor recreation, the benefits not traditionally accounted for within economic analysis also provide significant value. The combined total estimated value of nonmarket benefits such as aesthetic value, water quality, and habitat and nursery is between $6 billion and $10 billion a year.

Outdoor recreation provides opportunities for physical exercise, keeping local communities and visitors healthy. Outdoor recreation markets move income from urban to rural areas. Outdoor recreation draws employers who provide sustainable jobs. With these evident benefits taken into account, recreation is likely one of the largest investments in Whatcom County. Understanding the value of Whatcom's recreational assets is essential to providing an accurate economic analysis of Whatcom County's economy.

(Earth Economics, 2015)

Population Growth

As a part of Whatcom County's Comprehensive Plan update and urban growth area review, the county and cities undertake a process to allocate and project population growth. In 2012, the Washington State Office of Financial Management (OFM) developed a 20-year population projection for Whatcom County. The OFM projections for 2036 are provided in the table below:

	OFM Population Projections for 2036	Average Annual Growth Rate	Average Annual Population Growth 2013-2036	Total Population Growth 2013-2036
Low	225,580	0.4%	860	19,780
Medium	273,911	1.3%	2,961	68,111
High	330,869	2.1%	5,438	125,069

Figure 21: OFM Population Projections for Whatcom County

(Berk, 2013)

The County's 2036 population projection of 275,450 is within OFM's range. The County's rationale for using this figure, which is close to OFM's medium projection, include: ensuring an adequate land supply to accommodate growth, the need to plan for growth, and the need to protect the quality of life and natural resources in Whatcom County.

	2013 UGA Population	Projected 2036 Population	2013-2036 Net Growth
Bellingham	92,660	123,710	31,050
Birch Bay	7,540	12,822	5,282
Blaine	5,171	9,585	4,414
Columbia Valley	3,103	4,448	1,345
Everson	2,665	3,907	1,242
Ferndale	12,758	19,591	6,833
Lynden	12,872	19,275	6,403
Nooksack	1,435	2,425	990
Sumas	1,449	2,323	874
Subtotal	139,696	198,129	58,433
Area outside UGAs	66,104	77,321	11,217
Total Whatcom County	205,800	275,450	69,650

Figure 22: Whatcom County Population Projections and Distribution

(OFM, Population Trends, 2013). The Cherry Point UGA, which is not shown in the chart above, had an estimated 2013 population of 43 people.

Population by Age Group

All generalized population categories (school age, college age, working age and retirement age) have seen an absolute increase in population between 2000 and 2010. However, as a percentage of total population, the school age children category has declined, the college age category has remained steady, and the working age and retirement age categories have increased. OFM projects that the retirement age population (65 and over) will continue to increase over the planning period.

Population	**People**
Population estimates, July 1, 2015, (V2015)	212,284
Population, Census, April 1, 2010	201,140
Age and Sex	**Percent**
Persons under 5 years, percent, July 1, 2015, (V2015)	5.5
Persons under 5 years, percent, April 1, 2010	5.6
Persons under 18 years, percent, July 1, 2015, (V2015)	19.8
Persons under 18 years, percent, April 1, 2010	21.0
Persons 65 years and over, percent, July 1, 2015, (V2015)	16.0
Persons 65 years and over, percent, April 1, 2010	13.2
Female persons, percent, July 1, 2015, (V2015)	50.4
Female persons, percent, April 1, 2010	50.5
Race and Hispanic Origin	**Percent**
White alone, percent, July 1, 2015, (V2015) (a)	87.0
White alone, percent, April 1, 2010 (a)	85.4
Black or African American alone, percent, July 1, 2015, (V2015) (a)	1.2
Black or African American alone, percent, April 1, 2010 (a)	1.0
American Indian and Alaska Native alone, percent, July 1, 2015, (V2015) (a)	3.2
American Indian and Alaska Native alone, percent, April 1, 2010 (a)	2.8
Asian alone, percent, July 1, 2015, (V2015) (a)	4.4
Asian alone, percent, April 1, 2010 (a)	3.5
Native Hawaiian and Other Pacific Islander alone, percent, July 1, 2015, (V2015) (a)	0.3
Native Hawaiian and Other Pacific Islander alone, percent, April 1, 2010 (a)	0.2
Two or More Races, percent, July 1, 2015, (V2015)	3.8
Two or More Races, percent, April 1, 2010	3.8
Hispanic or Latino, percent, July 1, 2015, (V2015) (b)	9.2
Hispanic or Latino, percent, April 1, 2010 (b)	7.8
White alone, not Hispanic or Latino, percent, July 1, 2015, (V2015)	79.5
White alone, not Hispanic or Latino, percent, April 1, 2010	81.9
Education	**Percent**
High school graduate or higher, percent of persons age 25 years+, 2011-2015	91.2
Bachelor's degree or higher, percent of persons age 25 years+, 2011-2015	32.5
Income and Poverty	
Median household income (in 2015 dollars), 2011-2015	$53,145
Per capita income in past 12 months (in 2015 dollars), 2011-2015	$27,223
Persons in poverty, percent	14.4%

Figure 23: Whatcom County Socioeconomic Data

(OFM, Population Trends, 2015)

Local Participation

In 2013, The City of Bellingham administered a survey by phone to a random sample of households in Bellingham. Three hundred residents responded to the phone survey.

Eighteen percent (18%) of respondents stated they had used boat launches for motorized boats in the past year. Twenty-three percent (23%) stated they had used boat launches for non-motorized boats in the past year.

Just over one fifth (21%) said there are types of facilities they would like to use that don't currently exist. The most frequently mentioned types of facilities were walkways and trails, waterfront or beach access and swimming facilities (primarily swimming pools). Respondents were asked about the possibility of the City adding non-motorized boat launch sites to shorelines and waterways. Roughly, half of respondents (52%) said it was at least somewhat important. Respondents with children living in the household were especially likely to say this is extremely important (27% vs 15% of all respondents).

Respondents who said that improving water access would be an important project were asked to choose how they would like to see this happen. Thirty-eight percent (38%) of people want to see more places to wade or swim in the water. About a quarter (27%) thought trails with views of the water was most important and a similar proportion (26%) wanted more access for small boats. Open-ended comments indicated that most of the respondents who identified "Other types" of water access (9%) wanted all types of access and were unable to commit to one priority.
(Applied Research Northwest, LLC, 2013)

Non-Motorized Participation by User Group or Organization

In February of 2007, the Port of Bellingham hosted a Small Boat User Group workshop facilitated by the Reid Middleton consulting group. Approximately forty (40) people representing various group organizations were in attendance. The purpose of this workshop was to promote and support small craft access and usage in the increasingly urbanized waterfront of Bellingham Bay. The following user groups were represented at the workshop:

Small Boat User Groups		
Group	**Purpose**	**Size**
Homeport Learning Center	Use boatbuilding to educate at-risk youth	24 students per year, plus 4 staff
Elakah Kayaks	For profit group running overnight kayak tours in the San Juan's	10 staff, 290 customers/multi-day trips/yr.; 1000 customers/day trips/yr.
Whatcom Paddlers	Human powered racing boats of all kinds predominantly surf-skis	100+
Western Washington University Lakewood Watersports Facilities	Located on Lake Whatcom. Facility for students to learn boating techniques such as kayaking, canoeing, small boat sailing	25 staff, 350 students/qtr., 1000/yr.; 150 teens per summer program, 150 alumni/yr.

Small Boat User Groups (cont'd)		
Group	**Purpose**	**Size**
Sound Rowers	Open water rowing and paddling, volunteer non-profit club that sponsors human powered boat racing for weekend and world class athletes	locally:100 regionally: 1,000
Ocean Canoers	Organization of local ocean canoers	25
Lummi Nation Autumn Rose Club	War Canoe rowing club	30-100 paddlers/yr.
New Whatcom Rowing Club	Dedicated to open water rowing	50+ paid members
Whatcom Association of Kayak Enthusiasts (WAKE)	Non-profit social kayaking organization primarily focused on sea kayaking	180 paid members
Whatcom Maritime Association	A non-profit organization dedicated to cataloging, recording, preserving and restoring the past and present element of Whatcom County's maritime heritage	100+
Corinthian Yacht Club	Boating education; youth sailing programs	60+
Women on Waves (WOW)	Focus on getting women into high performance surf-skis	40
Washington Water Trails Association	Non-profit collaboration of people who love to travel and enjoy the world by small boats.	500+ regionally
Community Boating Center	Provide access to the water with small craft sailing, rowing, kayaking etc.	
NW Wind	Group of kite boarders and windsurfers in Bellingham Bay	84
Bellingham Yacht Club	Sailing club for dinghies and larger sailing vessels.	150

Figure 24: 2007 List of Organized Non-Motorized User Groups

Many of the Small Boat User Group's needs, such as salt water locations and facilities, classrooms, staging and storage areas near boat launches, storage areas that allows leaving mast up, better parking, safety/surveillance of cars and gear near launch sites, lower, more accessible docks for elderly or handicapped, showers for winter training and more transient or visitor moorage, were discussed.

A number of recommendations resulted from this workshop including:

1) Continue to participate in Port of Bellingham planning efforts.
2) Develop good links on websites between user groups for communication
3) Use this information to start developing joint activity/use ideas.

Since 2007 an additional User group known as the Kai Pana Outrigger Canoe Club, a non-profit racing club, relocated to Bellingham in 2013 from San Diego. Kai Pana Outrigger Canoe Club has 2 full time managing members with an additional 40 part-time members. Kai Pana utilizes the cove near the foot of Cornwall for a launch and practice site. Kai Pana recently leased property from the City of Bellingham on the southeasterly side of the intersection of Cornwall Ave. and Pine St., near the bottom of Wharf St, for storage their 44' outrigger canoes.

Boat Launch Activity

Use of Port of Bellingham boat launches is based on the honor system. The last fee increase became effective January 1st, 2012. Since 2012, boat launch revenues have generally increased each year. Squalicum Harbor's boat launch revenues have increased at an average annual rate of 38.15% during the last 4 year period. While Blaine and Fairhaven boat launches revenues remained relatively flat with a more moderate increase of an average annual rate of 4.18% and 0.37% respectively. Participation and revenue at the Fairhaven boat launch is restricted by the amount of available vehicle/trailer combination parking relative to the other two Port boat launches. In addition without regard to launch location, non-motorized boat launch users, when asked, often report they do not feel the need to pay because they are not using a vehicle to launch even though they are typically parking a vehicle and utilizing the facility.

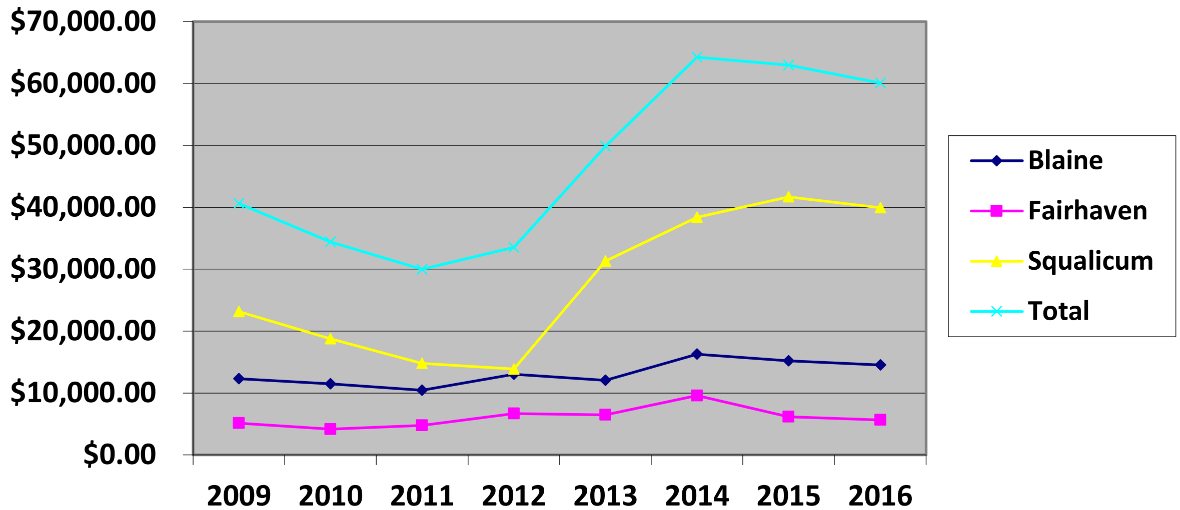

Figure 25: Boat Launch Activity 2009-2016

Vessel Registrations

The State of Washington Department of Licensing, Washington State Parks and Recreation Commission, and Interagency Committee for Outdoor Recreation Salmon Recovery Funding Board, retained BST associates in 2001 to provide a recreation boating assessment within Washington State. In this 2001 report, Whatcom County had 8,486 registered boats in the year 2000 and of those 5,206 were greater than 16 feet. (BST Associates, 2001)

In 2011, Whatcom County had 8,279 total vessels registered. Of those registered vessels, 5,778 were greater than 16 feet in length. This represents an increase of 572 registered vessels greater than 16 feet long in an 11 year time period or averaging 52 boats per year; indicating that vessel registrations for vessels over 16 feet long has occurred at an annual average growth rate of 0.95% per year between 2000 and 2011. While vessels over 16 feet in length increased, overall, the number of registered vessels decreased between 2000 and 2011 by 207 registered vessels in Whatcom County. This represents an overall decrease in Whatcom County registered boats by 2.44%. The overall decrease is mainly due to the decrease in registered vessels under 16’ which decreased by a total of 779 registered vessels or by 23.75% during this same time period. It should be noted that vessels less than 16 feet long with a motor of 10 horsepower or less, if used on non-federal waters only are exempt from Washington State registration requirements.

Vessel Registrations by Vessel Length in 2011					
County	Vessel				Total Registered
	Under 16 Feet	16-20 Feet	21-40 Feet	Over 40 Feet	
Whatcom	2501	2850	2669	259	8279

(No. 12-10-031 Part 4; Phase 2 Vessel Population and Pumpout Facility Estimates, Puget Sound No Discharge Zone for Vessel Sewage, 2012)

According to the US Census, between 2000 and 2010, Whatcom County’s population increased by a total of 34,314. This would indicate that the growth in vessel registrations for vessels greater than 16 feet in length in Whatcom County during the first decade of this century was approximately 1.5% or 15 per 1,000 in net population growth. It is important to note that this analysis does not assume a moorage absorption rate and does not account for unregistered vessels and visiting boaters. Therefore, an updated moorage study is recommended.

Whatcom County Salt Water Moorage Supply & Demand

There is a total supply of 3,557 wet moorage berths in Whatcom County. The occupancy rate and size of waiting list for each of the marinas located on salt water were used to determine the salt water moorage demand in Whatcom County.

	Berth Supply			Recreational			Commercial			Surplus or (Shortage)
Moorage Facility	Com’l	Recreational	Total	Occupancy	Wait List	Demand	Occupancy	Wait List	Demand	
Squalicum Harbor	102	1284	1386	96%	130	1363	85%	0	87	(64)
Blaine Harbor	91	539	630	74%	0	399	48%	0	44	187
Pt. Roberts Marina	0	924	924	72%	3	669	N/A	N/A	N/A	255
Semiahmoo Marina	0	280	280	73%	0	205	N/A	N/A	N/A	75
Birch Bay Marina(*)	0	265	265	80%	0	212	N/A	N/A	N/A	53
Sandy Point Marina(*)	0	72	72	100%	0	72	N/A	N/A	N/A	-
Total	**253**	**3,304**	**3557**		**133**	**2920**			**131**	**506**

Figure 26: Whatcom County Salt Water Moorage Supply & Demand

(*) Private residential community. Moorage facilities only made available through purchase of residence.

(P.O.B., 2017)

There is currently a surplus of 506 wet moorage salt water berths in Whatcom County of which 453 are available to the public at large. The available wet moorage berths are only available in the northern portion of the county.

Squalicum Harbor, located in Bellingham, has a total shortage of 64 berths with 130 vessels on the waitlist and is essentially considered fully occupied for recreational vessels and a small amount (15) of berths available for commercial vessels.