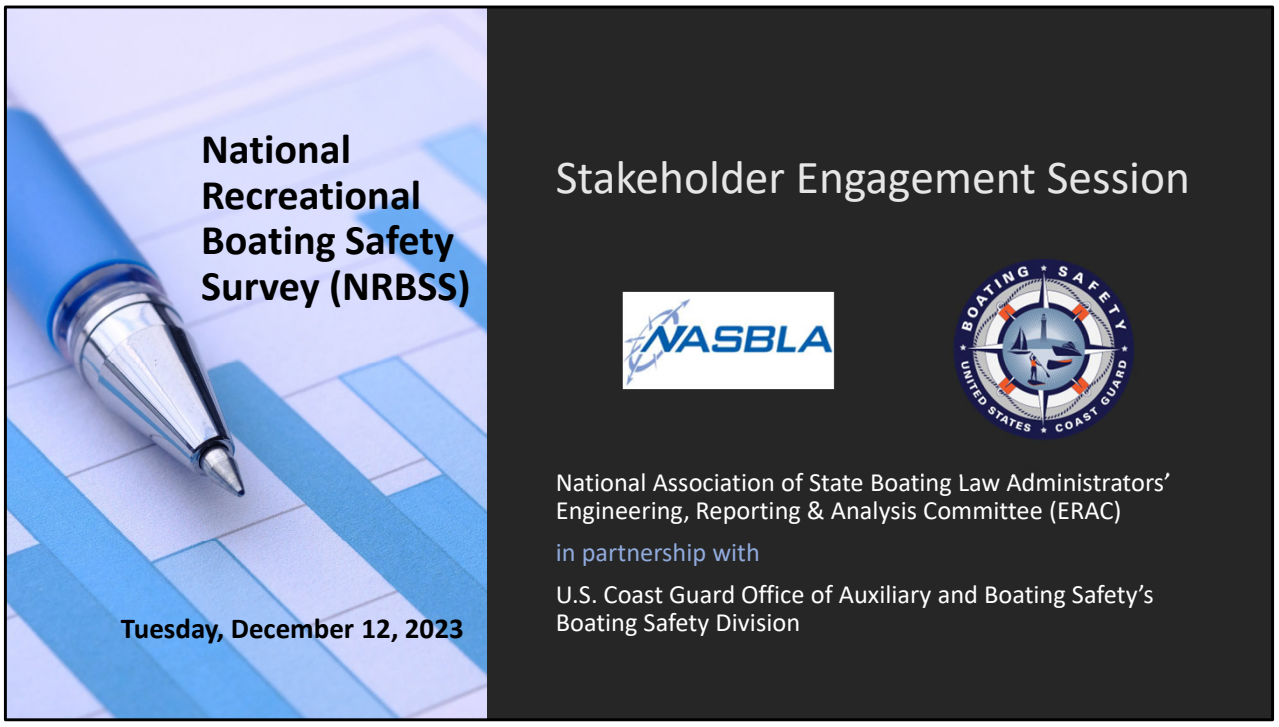


Good afternoon and welcome to this Stakeholder Engagement Session for the National Recreational Boating Safety Survey.

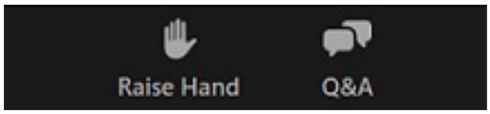
I'm Ron Sarver, NASBLA Chief of Knowledge & Learning Management, and I am pleased to serve as today's host for this session..

First, I'd like to review a few of the housekeeping matters.

Housekeeping items

All participants muted.

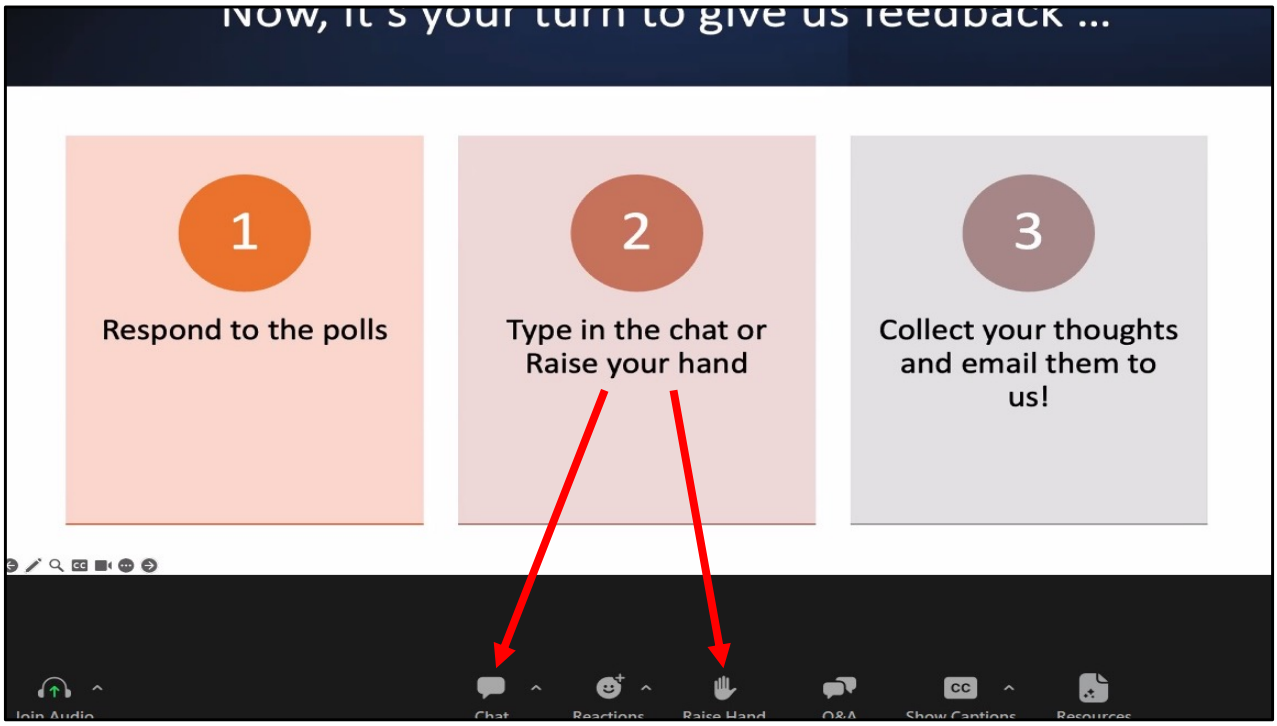
Utilize Q&A feature.



3

All participants are muted. Feel free to use the raise hand feature to let me know you'd like to ask a question at any point during the session.

You can also use the Q&A button at the bottom of your screen to type your question. I'll read it as appropriate and let our presenters answer.



During and after this session, we will have different ways for you to participate. During the session, you will be able to respond to the multiple choice polls as we launch them, respond to other questions by typing in the chat or raising your hand so that we can unmute you. **On thing to note: on the multiple choice polls, if you respond with "other" or "something else," please elaborate in the chat.** After the webinar, you can email your thoughts. The email address will be given at the end of the session.

Housekeeping items

Session is being recorded.

Available in 24 hours.

Also in NASBLA eLearning Center

11/7/23 5

This session is being recorded. A link to the recording will be available within 24 hours. We will also make the recording available in NASBLA eLearning Center, available on the NASBLA website.

With us today are:

ERAC Chair Tammy Terry. Tammy serves as a Natural Resources Law Enforcement Program Administrator for the Ohio Department of Natural Resources Division of Watercraft and has been employed with the Department since 1994.

Jonathan Hsieh, a management and program analyst with the Coast Guard's Office of Auxiliary and Boating Safety's Division of Boating Safety. In this capacity, he is responsible for boating safety data analysis and research. He is also the Program Manager for the National Recreational Boating Safety Survey that we'll be talking about today.

An ERAC WELCOME from Tammy Terry, Chair

- ERAC has had a long-time interest in the NRBSS for the benefit of NASBLA's membership
- Strong partnership with the CG-BSX survey specialists
- Given potential use of results for evaluating state-to-state program effectiveness, NASBLA-USCG Memorandum of Understanding 'codifies' the give-and-take on these survey efforts
- ERAC GOALS: benefit States and other key users by relaying important information from NRBSS and help CG-BSX as it gauges the surveys' value and usage

Thanks, Ron – and thanks to everyone for joining us today. With the hustle and bustle of the holiday season upon us, we appreciate all of you taking the time to listen in, whether it be live today or via recording post-webinar. We hope you find today's content informative – and even more important, thought-provoking with regard to the National Recreational Boating Safety Survey, and we look forward to hearing your feedback on today's topic – both on today's call and beyond.

To tie in ERAC's participation on today's call, it is important to know that ERAC has had a long-term interest in the National Recreational Boating Survey for the benefit of NASBLA's membership – notably, in exploring the methodology and potential use of survey data in the past, and in providing feedback to the Coast Guard on the details of future efforts.

This has resulted in a strong partnership with the CG-BSX survey specialists administering this tool. This tradition continues with Jonathan Hsieh, management and program analyst with the Boating Safety Division, who is overseeing the next iteration of the survey. Given the potential use of survey results for evaluating state-to-state program effectiveness, the NASBLA-USCG Memorandum of Understanding codifies ERAC's work in continuing this give-and-take with the Coast Guard crew on these important survey efforts.

And bringing us to today's webinar, ERAC's goal is to benefit the states and other key users by:

1. Relaying important information regarding the status, progress, and results of the next NRBSS
2. Assisting Coast Guard staff in gauging the surveys' value and usage to the states

So, with that introduction, I am going to hand over the mic to Jonathan to get us started…

Now, we'd like to know who you are…

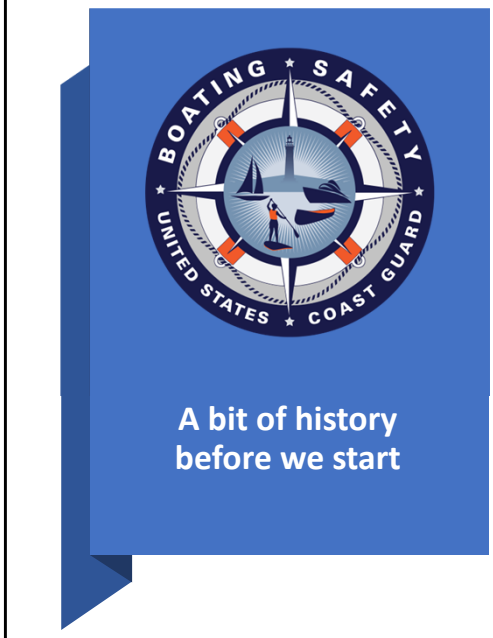
Zoom Poll #1

Which of the following best describes you? (n=26)

- **State Boating Law Administrator/Designee or Other State Personnel (31%)**
- **U.S. Coast Guard / Other Federal Personnel (23%)**
- **Recreational Boating Organization/Nonprofit Representative (23%)**
- **Boating Industry Representative/Manufacturer (4%)**
- **Other (19%)**

Responses in chat from participants who identified as "other":

The "other" respondents included persons from public health, NORC at the University of Chicago (which has signed the cooperative agreement with the USCG to conduct the 2026 NRBSS), and Responsive Management, which is partnering with NORC.



- NRBSS is the U.S. Coast Guard's method for estimating the totality of recreational boating in the United States
- Surveys conducted in 2018, 2012, 2002, 1992, 1989, 1976 and 1973
- Public Law No: 117-58, the Infrastructure Investment and Jobs Act, authorizes the Coast Guard to conduct the NRBSS and spend $1.5M/year
- NRBSS sets the foundation for going beyond the 'traditional' *# accidents/100,000 registered boats* measurement by using the entire population
- Gives the Coast Guard more ways to measure risk in order to achieve goals set in the National RBS Strategic Plan

These surveys are the method in which the U.S. Coast Guard gains a nationwide picture into boating. There are many gaps in recreational boating data for which a survey helps fill that gap. These are gaps such as estimating the unregistered boat population and determining overall usage (or what we call exposure) of boats – a figure needed to determine overall risk. The Coast Guard collects very good accident data, and the survey helps complement that. Survey data also helps us look at trends in boating and socioeconomic indicators so we can better understand who is going boating in the United States.

We've conducted seven of these surveys since the early 1970s. These range from phone surveys to a survey administered by the American Red Cross in the early 90s.

By law, we are authorized to spend up to $1.5 million dollars a year to conduct a survey

In the Coast Guard's annual statistics publication, the traditional measurement of risk is fatalities/total vessel registration or per 100,000 registered vessels in a state. The usage or exposure data in the NRBSS allows us to go past that and measure these data a few different ways, basing it on usage and not registration numbers and also being able to compare metrics within a state – such as looking at motorized vessel or human-powered vessel risk.

These new methods of calculation allow us to measure risk more effectively and better inform our decision making toward the initiatives outlined in the National RBS Strategic Plan. Some goals and objectives in our strategic plan include: improving our overall calculation of risk, devising an evidence-based approach such as utilizing the public health approach to better the calculation of risk.

Where does this stakeholder session fall in the USCG / NORC survey development timeline?

- **Signing of cooperative agreement**: NORC at the University of Chicago and the USCG have signed a cooperative agreement to conduct the 2026 National Recreational Boating Safety Survey (NRBSS)
- **Engaging stakeholders:** Now through end of February 2024, sharing information and collecting feedback on survey uses, data needs, interests, perspectives.
- **Building the survey infrastructure**
  - Use Cases
  - Human-powered vessel ownership lists
  - Vessel registration lists
  - Feedback on survey questions
- **Testing survey questions**: by May 2024, starting cognitive interview process for the 2026 survey

2018 Participation Survey
A few takeaways from the nationwide look at boating…

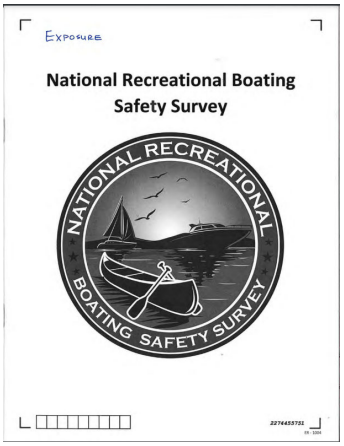
Table 3-7. Percentage and Number of Persons Who Went Boating in 2018 and Participated in Different On-Boat Activities

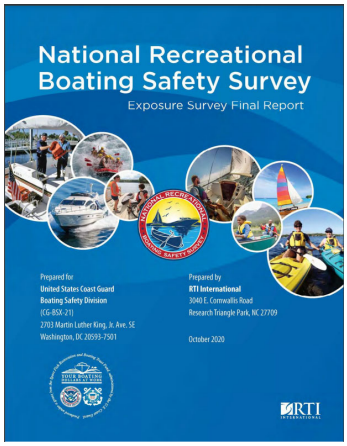
Activity	Percent[1,2]	Number (000)[3,4]
Fishing or crabbing	29.9	25,278
Cruising	43.4	36,692
Sailing	4.4	3,719
Paddling	39.2	33,141
Rowing	4.4	3,721
Jet skiing	8.7	7,355
Water skiing—wakeboarding	7.0	5,918
Hunting from the boat	1.0	845
Racing	0.3	254
Scuba diving or snorkeling off boat	4.0	3,381
Sightseeing or observing nature	30.4	25,701
Socializing with friends	31.5	26,631
Sunbathing	14.8	12,512
Whitewater rafting	1.8	1,523
Other activities	10.2	8,623

- **Who was a "Boater"?** – someone who went out on the water on a recreational boat at least once in 2018
- **How many in 2018?** – 84.5 million persons (26.5% of the U.S. population) went on the water
- **What were estimates based on?** – 43,590 surveys sent to yield a target of 5K completed surveys (5,851 responses received for a 14.9% response rate)

2018 Exposure Survey

A few takeaways from the estimates generated

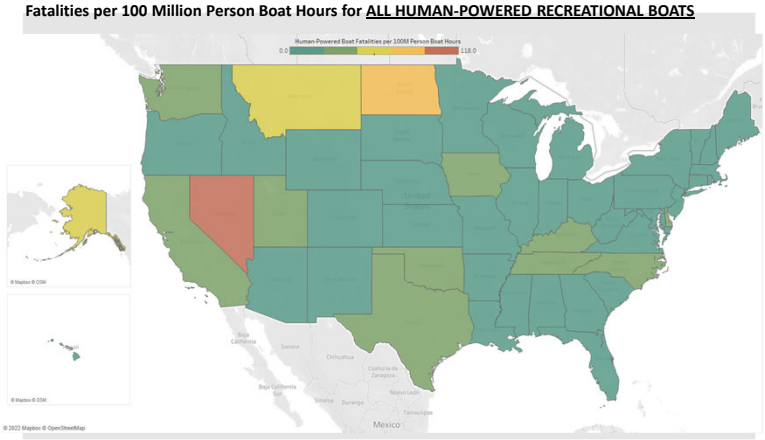




- **Exposure estimates – overall –** 795 million outings, 10.2 billion person boat hours, 3.4 billion boat hours.
- **Exposure estimates – state level –** Yielded more than 30 state-specific estimates.
- **Estimated unregistered boat population –** 13.4 million, not required by law to be registered in states where they're kept/stored.
- **What were estimates based on? –** 213,659 surveys sent out to yield a target of 30,000 completed surveys. 31,733 responses received (21.9% response rate).

What *was* the risk in 2018?

Fatalities per 100 Million Person Boat Hours for ALL HUMAN-POWERED RECREATIONAL BOATS



Source: 2018 National Recreational Boating Safety Survey Exposure Survey Final Report, Table 3-61

- **Higher risk for human-powered craft in 2018**—the 13 per 100M person boat hours was twice the national fatality risk ratio for all recreational boats.
- **The map shows variations in fatalities between states**. The top end was 118 per 100M person boat hours for human-powered boats.

This slide shows the risk associated with human-powered craft in 2018:

- The risk of boating fatalities for human-powered boats (13 per 100 million person hours) was **twice** the national risk rate in 2018 for **all** recreational boats.
- Again, that is a national rate. As the map shows, however, there is variation among the states. So while the national risk ratio was 13 per 100 million person hours, the highest ratio among state figures was 118 per 100 million person boat hours.

How can you use the survey data?

- Get overall number and characteristics of recreational boaters – demographics, activity, non-boating questions, ownership, boating safety courses
- Estimate number of unregistered (human-powered) boats.
- Use state-level exposure estimates to gauge risk
- Assess use of safety equipment – EPIRBs, PLB, ECOS, VHF-DSC
- Get storage, operating condition, trailering, ownership info … and more!

Now, it's your turn to give us feedback …

1. Respond to the polls
2. Type in the chat or Raise your hand
3. Collect your thoughts and email them to us!

Tell us about your past experience with NRBSS…

Zoom Poll #2

Have you – or has anybody in your agency or organization – used any of the data / findings from the 2018 or previous NRBSS surveys? (n=21)

- **Yes (57%)**
- **No (14%)**
- **Not sure (29%)**

Responses in chat from participants who indicated "how" they or somebody in their agency/organization have used the data / findings:

To normalize mishap data (in lieu of registration data).
For grant proposals and in grant final reports.
To calculate drowning rates by hours of operation per boat type.
To facilitate discussion with legislative matters at the capitol.
To better target boating safety messaging to user group.
Used exposure data as a comparison, especially for fatality rates.
To help determine what courses and seminars to create / teach to the boating public.
[Determine] equipment on board boats.

Tell us about your past experience with NRBSS…

Zoom Poll #3

If you haven't used the data or findings from the NRBSS, what obstacles or difficulties stopped you from doing so? You can select more than one response (n=14)

- **Getting access to the data in a usable form or format (43%)**
- **No time to read through or interpret the written reports (21%)**
- **Couldn't figure out how to apply them to my state or organization (14%)**
- **Something else (21%)**
- **Nothing! This doesn't apply to me/us because we've used them! (50%)**

Another response in chat:

One participant added struggle with state-specific data in some cases.

Tell us about your past experience with NRBSS…

Zoom Poll #4

Have you had any concerns about the reliability of the estimates that have come from any of the previous NRBSS surveys? (n=19)

- **Yes, I/we have had concerns (42%)**
- **No, not that I'm aware of (16%)**
- **Don't know enough about this to say (42%)**

Responses in chat from participants who indicated concerns:

Low response rates.
Very high cost to the low response rate.
Total responses in some states were not as good as hoped.
Would like to understand how data is extrapolated based on the response rate.
More frequent survey data would be helpful.
Concerns about how to identify good list of human powered craft owners.
Consider partnering with Paddling magazine or Paddling.com [follow-up suggestion for how to better identify human powered craft owners].
Being able to see the calculations used for the resulting data sets may be helpful when trying to understand public's involvement with boating.

For the future…

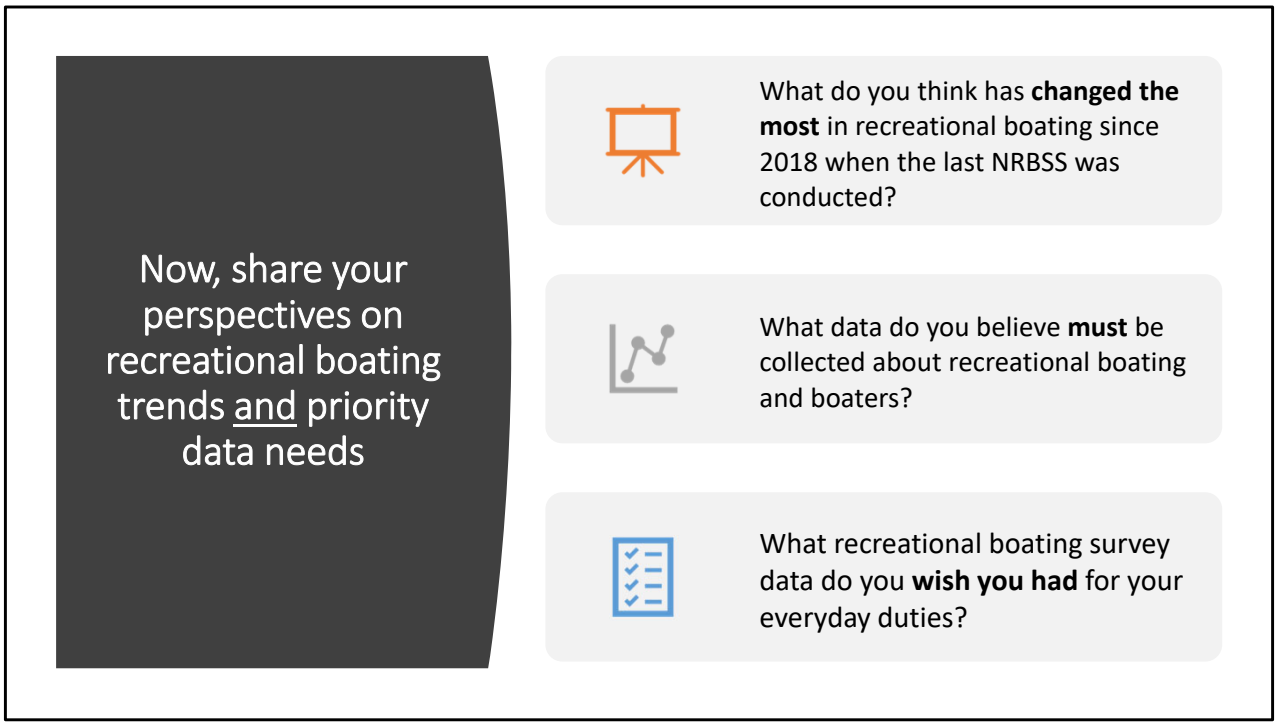
Zoom Poll #5

What would make the survey data and findings most useful to you, your agency / organization? You can select more than one response. (n=18)

- **Easy to 'digest' reports (83%)**
- **Access to the raw data (files or some searchable format) (78%)**
- **Videos highlighting findings (17%)**
- **A report specifically presenting state-by-state data/findings (83%)**
- **Briefs with examples of how states/organizations are applying the data (61%)**
- **Something else (6%)**

Additional responses in chat from participants:

Interactive data dashboards.
Understanding how to use the data from this survey with other datasets of interest.

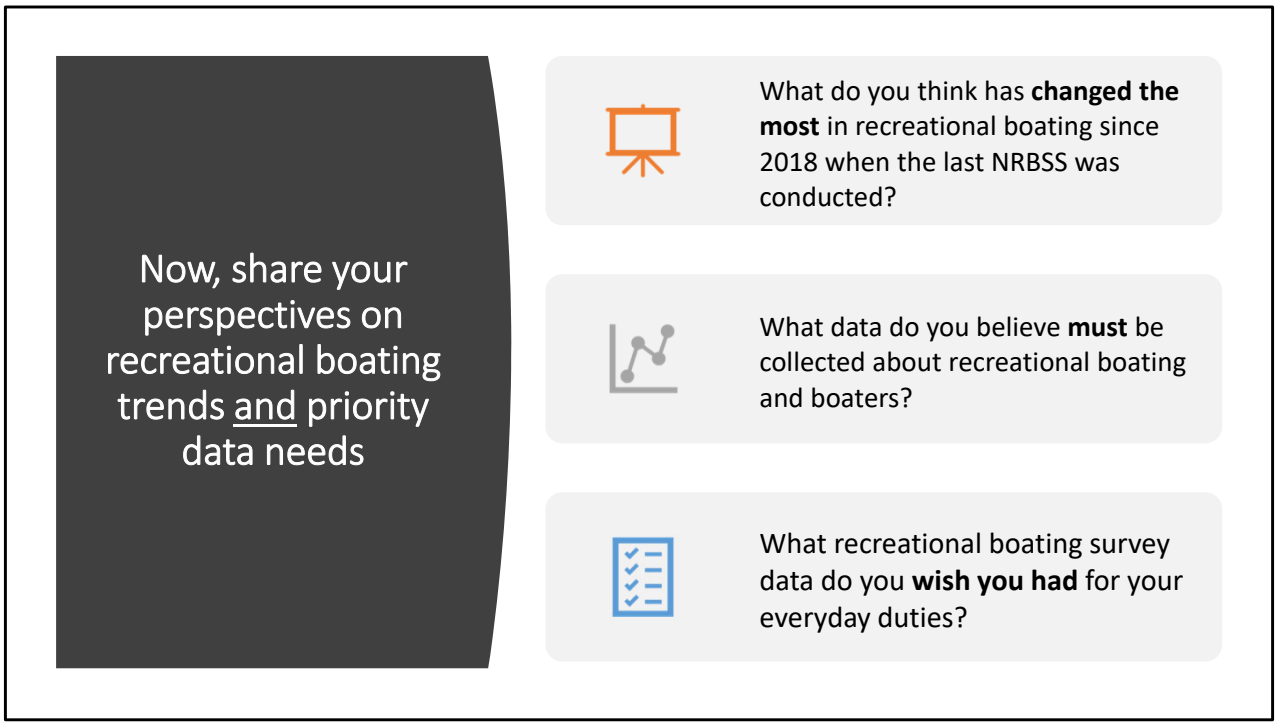


As a reminder, please raise your hand if you'd like to respond and we will unmute you. Or if you prefer, you can respond using the chat feature.

Responses in chat from participants to "what has changed the most" since 2018?

Ownership types (use of rental or clubs); boat rental model changes; borrowing boats; decrease in affordability of new vessels.
Pandemic / COVID increased numbers of boaters; how many still boating?; how did they learn to operate their boat?
Boat size, design.
More human propelled, paddlecraft use.
More overall use.
More driveway-to-driveway sales (hard to track and count).
Use of multiple types of vessels by same person.
Boater demographics.
ECOS law enactment.
Electrification.
High insurance costs, especially in FL; and related, hurricanes.

This slide is repeated—next page—to show responses from second question re data that "must" be collected.

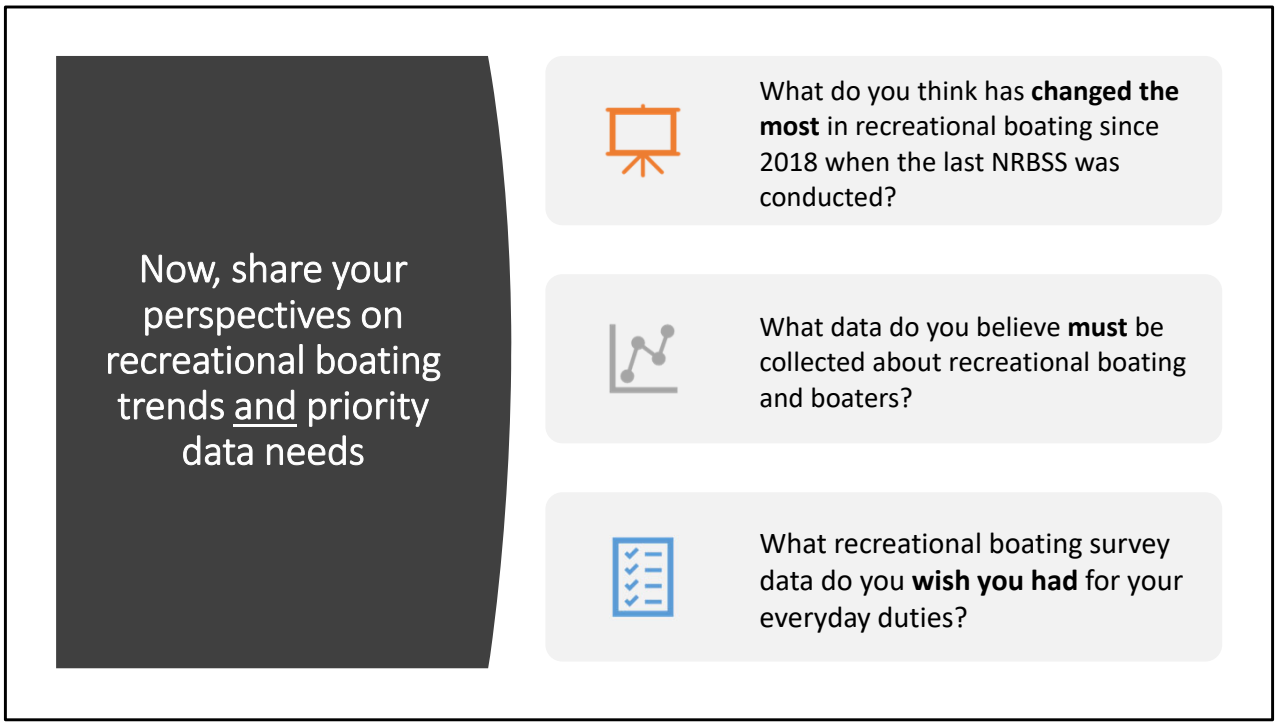


Responses in chat from participants to "what data must be collected":

Trips and duration by activity and boat types.
Types of boating activities and where boating occurs.
Number (total) and types of boats in each household.
Locations for boating (lakes, rivers, ocean).
Better idea of rental numbers and human propelled AND how many "occasional" users.
How many years they've been a boater.
Seasonality – a big topic when looking at fatalities and injuries; would be helpful to have seasonal breakdowns of boaters to be able to use that info as denominator.
Boat renting peer-to-peer – how often and to whom, what type?
Rentals, passenger only vs ownership.
Operator vs passenger type.
Formal training in type of boat [they're] operating.

Additional suggested question for data collection came through Q&A:
Regarding life jackets, along with asking if a life jacket was present for each person aboard and if they were worn can you ask the question "What would encourage you to wear a life jacket at all times when boating?" since statistics from USCG show that a very low percentage of boaters are wearing life jackets when boating, and then include that information in the final reports.

This slide is repeated—next page—to show responses from third question re wished-for survey data on recreational boating.



Responses in chat from participants to what data they "wish" they had for their duties:

Exposure data for boat type.
Waterway specific use data to correlate with incident data.
Would like any feedback on the boating education they may have—was it in-depth? valuable? What education *was* most valuable?
What is their knowledge base for Navigation Rules?
With zip code – understanding zip code of residence vs zip code of use of boat.
Where do you get your boating operation information?
What keeps non-boaters from boating?
Do boaters refresh their knowledge regularly? How?

Next Steps

Through February 2024

- USE CASES
- Human-Powered Vessel ownership lists
- Vessel registration lists
- Feedback on survey questions

USCG Point of Contact
Jonathan Hsieh
Jonathan.c.hsieh2@uscg.mil
(571) 608-6241

Scan the QR code or go to
https://uscgboating.org/statistics/national-recreational-boating-safety-survey.php

End of session wrap up, included review of next steps – request for Use Cases – assistance in gathering vessel ownership lists – request for feedback on past surveys' questions. Additional questions were posed for response by NORC representatives:

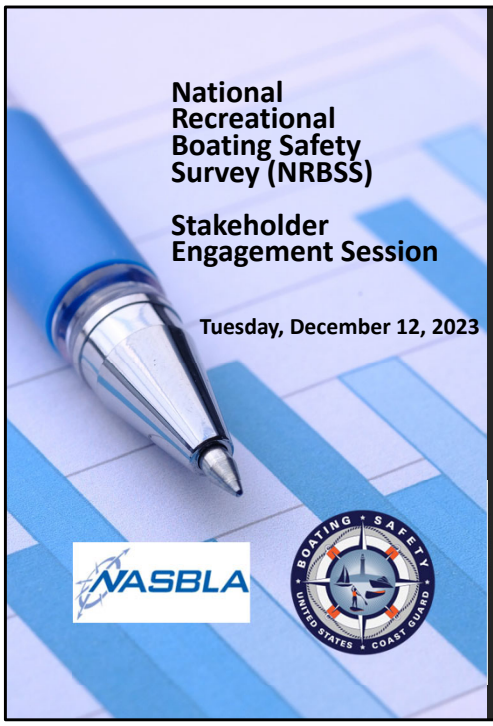
As to possible sources for human powered vessel ownership:

American Whitewater.
Product registration lists may be helpful for human powered craft?
Also, consumer product safety commission. As example:
https://www.cpsc.gov/Recalls/2022/Paddles-Sold-with-Stand-up-Paddleboards-Recalled-Due-to-Risk-of-Puncture-or-Laceration-Hazard-Manufactured-by-Agit-Global)

Questions posed:

Could you explain more about frame building for human powered craft?
Also, how is national sample outreach done?
Will there be any data on Jetboards and eFoils?

Noted as an FYI regarding gathering rental data: rental status isn't required to be reported in the Code of Federal Regulations. However, many States report it in BARD.



ANY QUESTIONS?

After the session,
USCG Point of Contact
Jonathan Hsieh
Jonathan.c.hsieh2@uscg.mil

The recording for this session will be posted to NASBLA's eLearning Center at https://training.nasbla.org/

Thank you for participating!