

2019 Shared Harbor Survey

The State of Passenger, Recreation,
Freight and Maritime Support Services in
the Port of New York & New Jersey

NYC / EDC
PORTNYC





TABLE OF CONTENTS

| | |
|--|----|
| Executive Summary..... | 5 |
| I. 2019 Survey Overview..... | 9 |
| II. Jobs..... | 14 |
| III. Industry & Business Sentiment/Needs... | 29 |
| IV. Location of Maritime Organizations in the Harbor..... | 38 |
| Appendix i: Methodology/Accuracy | 53 |
| Appendix ii: Additional Findings | 56 |
| Appendix iii: Inventory of Organizations.... | 65 |

EXECUTIVE SUMMARY

The New York City Economic Development Corporation (NYCEDC) in conjunction with the New Jersey Department of Transportation (NJDOT) conducted a survey of maritime businesses between January and March 2019. In response, 110 maritime organizations in the Port of NY/NJ completed the Shared Harbor Survey (SHS). These responses were divided into three sub-industry categories: Passenger, Recreation, & Support/Freight. Responses were compared across categories and location in the harbor.

Overall, respondents have positive sentiments about the state of the maritime industry. Over the last decade, they reported seeing general improvements to their own businesses as well as a perceived upward trajectory of the industry as a whole. This is further substantiated by high rates of hiring and low employee turnover.

When compared to all U.S. companies, those employed in the maritime industry in NY/NJ stay at their jobs more than twice as long as the average American worker. This speaks to the quality of the jobs and is perhaps influenced by the industry's higher rates of organized labor as well as the limited number of major port complexes in the U.S.

Despite positive sentiment and ample job opportunities, barriers to growth exist. When asked about improvements needed to make business better, respondents cited dredging and bulkhead repair most frequently. Barriers to future growth for various maritime groups are distinct. When asked about the outside pressures impacting business, passenger sector survey respondents indicated harbor congestion, recreational harbor users noted scarcity of real estate, and the maritime support/freight industry cited regulation.

In addition to the survey, NYCEDC inventoried 574 businesses and 757 maritime locations across the five boroughs of NYC and the New Jersey counties of Bergen, Essex, Hudson, Union, Monmouth, and Middlesex.

The inventory found a greater number of maritime support/freight organizations and firms on the New York side of the harbor, while the survey indicated New Jersey held a greater share of jobs in this category. In general, New Jersey maritime firms who completed the survey are larger than their New York counterparts. Although New Jersey organizations are larger, workplace locations do not necessarily reflect the residences of workers. Some 36 percent of those employed in maritime operations in New Jersey are NYC residents and 25 percent of those employed by NYC-based maritime firms commute from NJ.

Survey responses on employment and hiring point towards a skills gap in the industry. Although 58 percent of respondents are hiring, 75 percent of maritime industry employers find it difficult or impossible to find skilled workers. Despite available pipelines through maritime educational institutions and unions in the region, and the 82 percent of survey respondents who have hosted apprentices—39 percent on a regular basis—continued skills gaps make it difficult for maritime employers to find qualified applicants.

Responses to survey questions on employee demographics revealed women and people of color are underrepresented in the Port of NY/NJ maritime industry. Overall, 32 percent of respondent's employees are female, and although the region surveyed is 55 percent non-white, only 40 percent of employees accounted for in the survey are people of color.

In summary, as of 2019, the waterways of New York and New Jersey are vibrant, busy, and well used for recreation, transportation, and commerce. The waterways as much as ever are the source of thousands of jobs and regional quality of life. Based on findings of the 2019 SHS, in order to continue to strengthen our maritime business and recreation environment, next steps will be to increase maritime workforce pipelines through access and sector awareness, work to match industry jobs with the demographics of the region, invest in marine assets, and continue to champion and develop public policies that support maritime uses.



2007 Breakdown

37

Responses from
target audience

19

from other areas
in the harbor

56

Total responses

36%

Response rate

195

Page document

174

Page Appendix

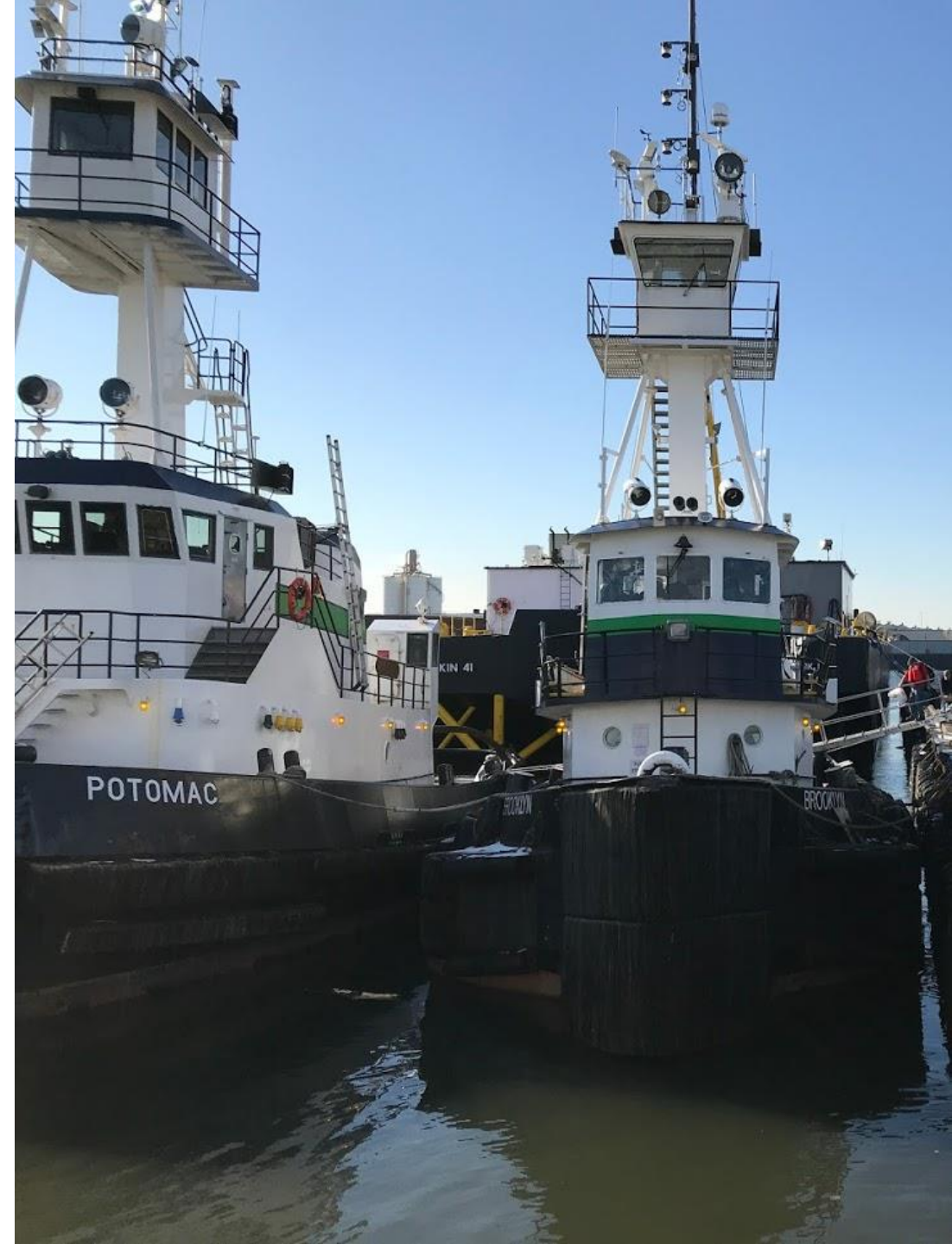
1991 Maritime Support Services Study & 2007 Maritime Support Services Study

This 2019 Shared Harbor Survey (SHS) follows studies of the region's maritime community conducted in 1991 and 2007 called the Maritime Support Services Location Studies. These prior studies focused on maritime support services exclusively. Maritime support services were defined as the tug and barge industry, ship repair and dry dock operations, and government services.

The 2007 study area was businesses located in New York City's Significant Maritime Industrial Areas (SMIAs), geographic waterfront areas defined by the New York City Department of City Planning in the Local Waterfront Revitalization Plan. In addition to SMIAs, The 1991 study assessed Newark Bay, both sides of the Arthur Kill and Kill Van Kull, as well as the Bayonne Peninsula.

The 2007 study was spearheaded by the New York City Economic Development Corporation (NYCEDC) in conjunction with the Brooklyn Navy Yard Development Corporation, and conducted by Faculty researchers at the State University of New York (SUNY) Maritime College. The survey was distributed in person, by mail, fax, and email, as well as on SUNY Maritime's website. Key 2007 recommendations included: an increase in the number of dry docks, creation of additional marine vessel tie-up space, re-evaluation of regulation and zoning codes, as well as enhancements to the city's emergency response capabilities.

The 1991 study was conducted by NYCEDC's predecessor entities the City of New York Department of Ports and Trade and the New York City Public Development Corporation, in collaboration with the New York City Department of City Planning (DCP), the Port Authority of New York and New Jersey (PANYNJ), and the New Jersey Department of Environmental Protection (DEP). The 1991 survey responses were solicited by way of physical mailings and telephone.



2019 Shared Harbor Survey

The 2019 SHS expands on both the geographic area and maritime users assessed. All waterfronts across New York City's five boroughs and in the Northern New Jersey counties of Bergen, Essex, Hudson, Middlesex, Monmouth & Union were included in the survey. Additionally, beyond maritime dependent freight and industrial services, the 2019 SHS also solicited responses from passenger and recreational maritime operations. The more inclusive survey scope covers maritime organizations—passenger or otherwise—that are directly dependent on the water and have upland water dependent facilities in the Port of New York and New Jersey (NY/NJ).

As in the past, absent from the 2019 survey are deep draft international Ocean Carriers. While those firms are active in the NY/NJ harbor—and drive much of the maritime economy—beyond some headquarters, financial, and legal functions, these international shipping entities do not directly control facilities or permanent marine assets in the Port and were therefore outside the survey's scope of inquiry.

The 2019 survey aims to update local figures and trends in employment, industry growth, community sentiment, and business locations to inform future public investments, policy, and planning decisions for the waterfront and waterways of the Port of NY/NJ.

The 2019 survey was conducted online with a link distributed via email as well as on NYCEDC's website. NYCEDC representatives promoted the survey at Harbor Operations, Waterfront Management Advisory Board, and various community board meetings and through local survey partners listed on the back page.

All respondents were asked questions about their respective facilities, locations, jobs, and industry sentiment. Depending on their self-identified maritime category, survey questions varied slightly to address the specifics of each sub-industry sector.

Survey respondents were asked to self-identify into 1 of 6 categories:

Freight: Cargo & Commodity Terminals: Marine Freight, Containers, Aggregate, Liquid, and Bulk

Recreational & Educational: Marinas, Recreational Clubs & Groups, Historical Boats & Maritime Museums, and Educational Institutions

Ferry, Charter, & Excursion Services: Passenger Ferries, Tours, and Charters

Maintenance, Ship Repair, Construction, Waterfront Inspection, & Emergency Response: Dry Docks, Graving Docks, Ship Repair, USCG, NYPD, etc.

Other Maritime Businesses: Pilots, Offshore Wind, Management Associations, Labor Unions, Consultancies, etc.

Tug & Barge: Tug & Barge Operators



I. 2019 SURVEY OVERVIEW



2019 SURVEY

110 Responses

Respondents are **19%** of all inventoried maritime organizations in Port of NY/NJ



Freight: Cargo & Commodity Terminals



Maintenance, Ship Repair, Construction, Waterfront Inspection, & Emergency Response



Recreational & Educational



Other Maritime Businesses



Ferry, Charter, & Excursion Services



Tug & Barge

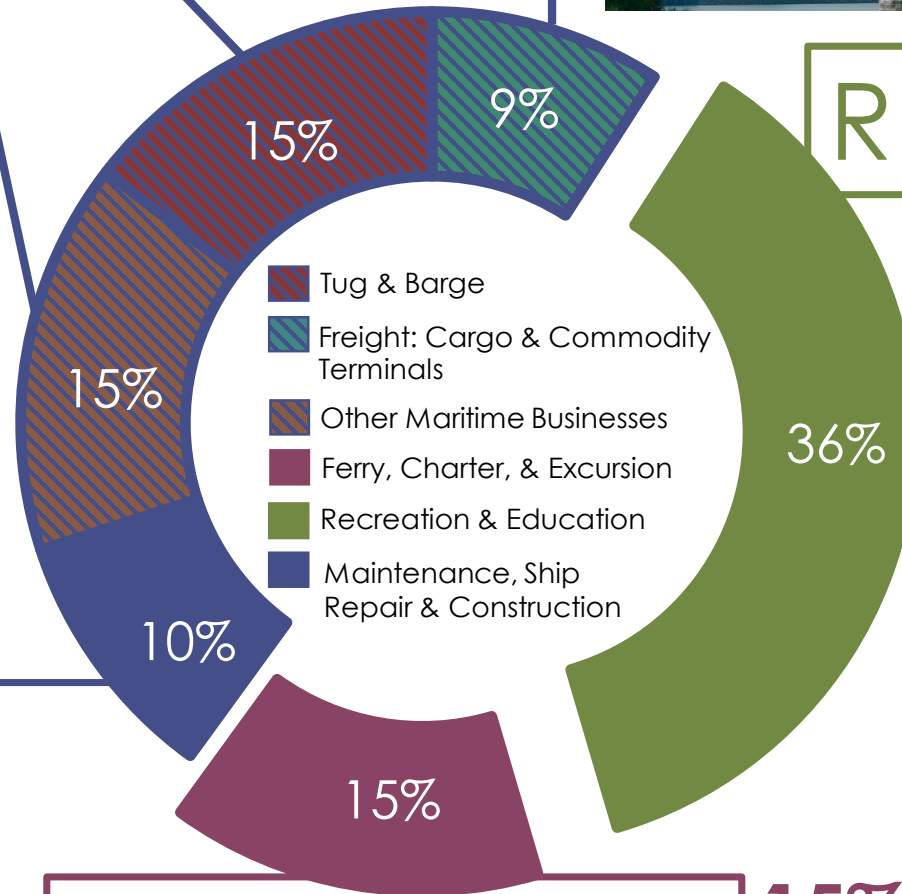
SUPPORT/FREIGHT

49%
of total
responses



RECREATION

36%
of total
responses



PASSENGER

15%
of total
responses

For analysis, survey respondents from **Freight: Cargo & Commodity Terminals; Maintenance, Ship Repair, Construction, Waterfront Inspection, & Emergency Response; Other Maritime Businesses;** and **Tug & Barge** are re-grouped into the *Support/Freight* subsector of marine operations. The **Recreational & Educational** category title is simplified to *Recreation* and **Ferry, Charter, & Excursion Services** to *Passenger*.

2019 SURVEY

110
Responses

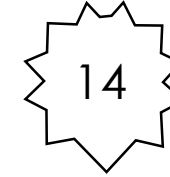
Location of maritime organizations who responded by State

Several maritime organizations and firms indicated locations and operations both in New York and New Jersey, emphasizing the interstate nature of the region's maritime industry.

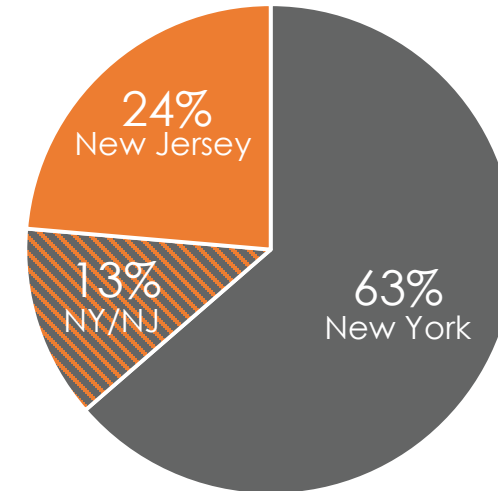
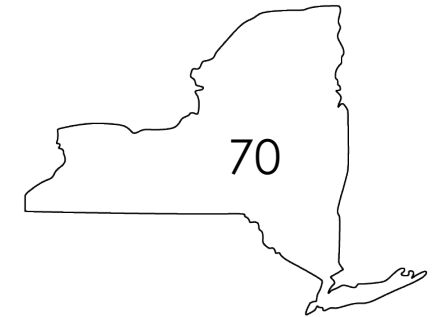
NEW JERSEY



NEW YORK
&
NEW JERSEY



NEW YORK



Of the 110 responses, 70 are based exclusively in New York. NYCEDC partnered with the New Jersey Department of Transportation (NJDOT) to distribute the survey. All survey respondents were offered a coffee gift card to Starbucks or Dunkin' Donuts for their participation.

New York & New Jersey

of responses

16

PASSENGER



12 New York
2 New York & New Jersey
2 New Jersey

40

RECREATION



32 New York
8 New Jersey

54

SUPPORT/FREIGHT



26 New York
12 New York & New Jersey
16 New Jersey

30
25
20
15
10
5
0

Passenger

Recreation

Support/Freight

New York

Passenger

Recreation

Support/Freight

New York &
New Jersey

Passenger

Recreation

Support/Freight

New Jersey

Maritime support/freight firms have the greatest percentage (22%) of businesses with interstate operations. Passenger services show some overlap between states—transporting people across the harbor—while maritime recreation organizations are often hyper-local single location businesses.

II. JOBS

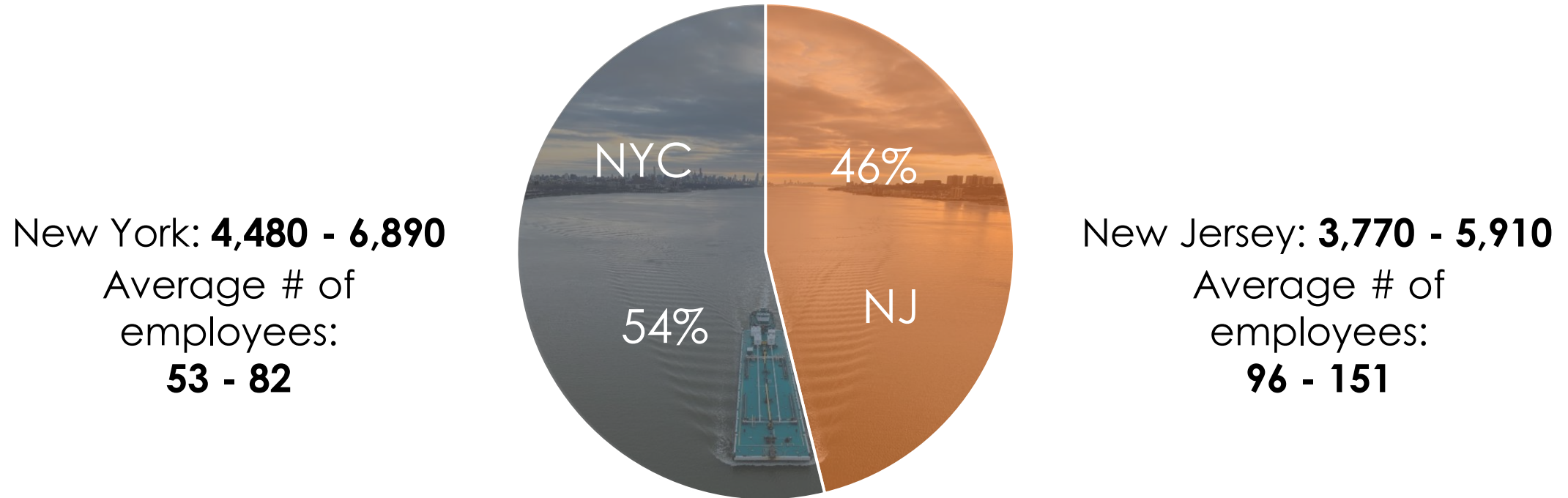


Students learning about the ILA at the 2018 Maritime and Freight Logistics Career Awareness Fair

Total maritime jobs captured by survey in the NY/NJ Harbor: **8,250 - 12,830**

Average # of employees: **75 - 117**

The survey asked respondents to estimate the number of people their organization employs. Participants answered in any of the following ranges: 1-5, 6-10, 11-25, 26-50, 51-100, 101-250, 251-500, and 500+. To estimate the number of jobs captured by the survey an average of the higher limit and lower limit of each range was taken. On average, New Jersey maritime firms are larger than New York firms.

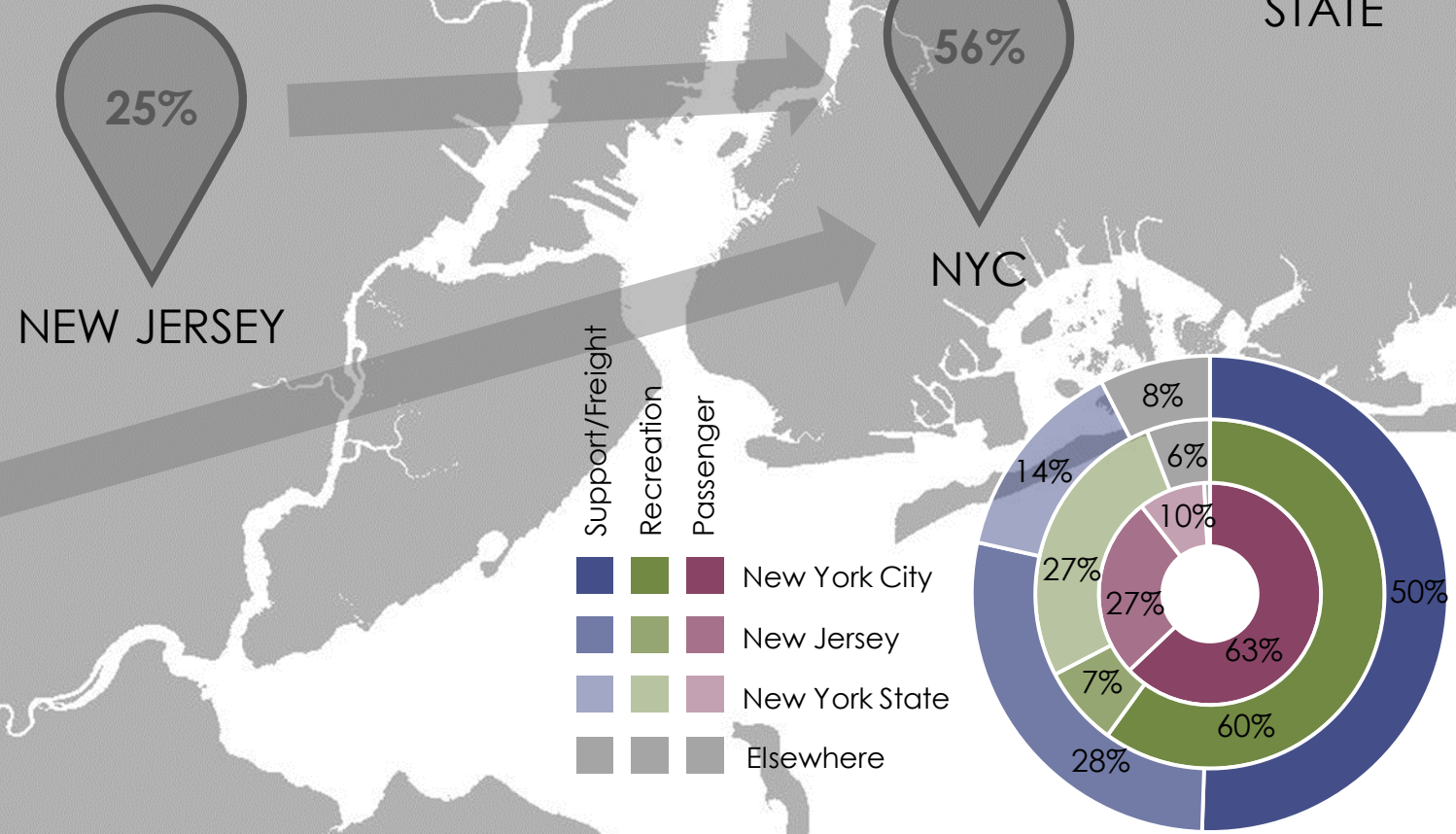


36 percent of survey respondents have locations in New Jersey, while 46 percent of the jobs captured by the survey are located there. The higher proportion of jobs to businesses may speak to two things: the surveys overrepresentation of recreational organizations on the New York side of the harbor (who on average have far fewer employees) and the larger size of maritime support/freight firms in New Jersey. However, jobs located in New York or New Jersey are not necessarily going to local residents. The survey showed (on the following slide) nearly half of all employees in the Port of NY/NJ commute from outside the job center.

Where do people employed in the maritime industry in New York commute from?

 All Respondents

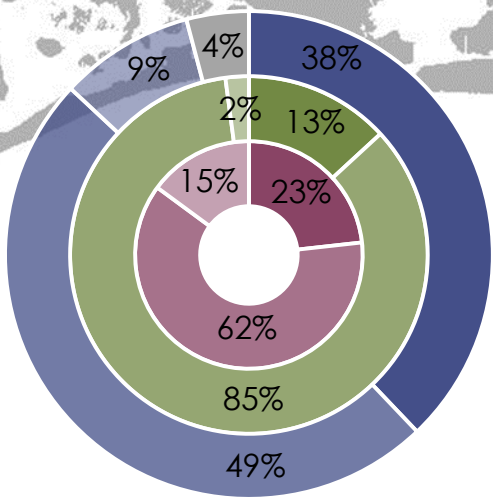
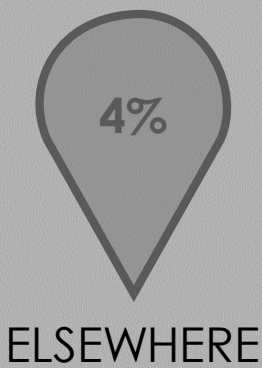
On the New York-side, 25 percent of maritime employees commute in from New Jersey, while 14 percent come from elsewhere in New York State, and 5 percent from outside of the Port of NY/NJ. NYC maritime support/freight subsector employees have the highest commuting percentage, with 50 percent of survey respondents' employees coming from outside New York City. When compared to New Jersey's recreation subsector, NYC has a much higher rate of commuters, at some 40 percent.



Where do people employed in the maritime industry in New Jersey commute from?

 All Respondents

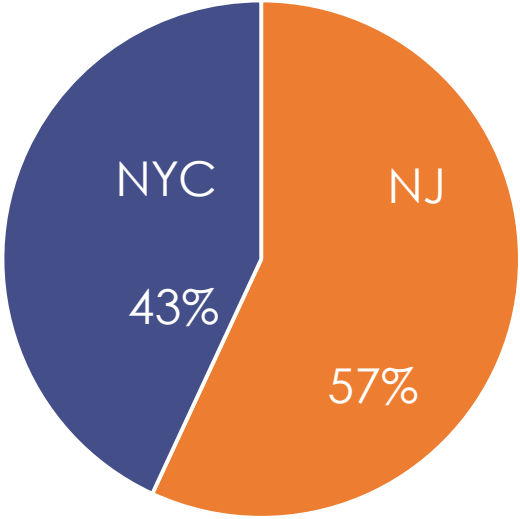
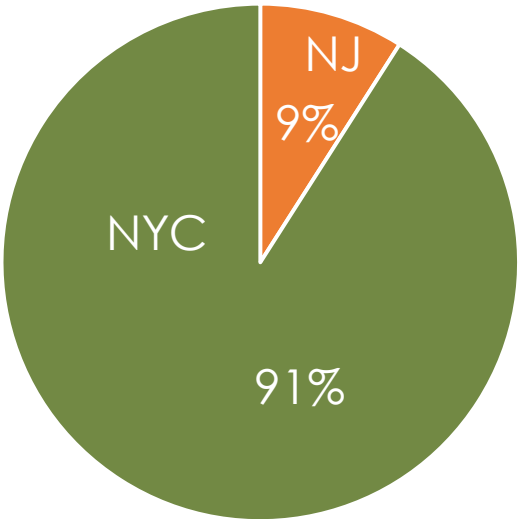
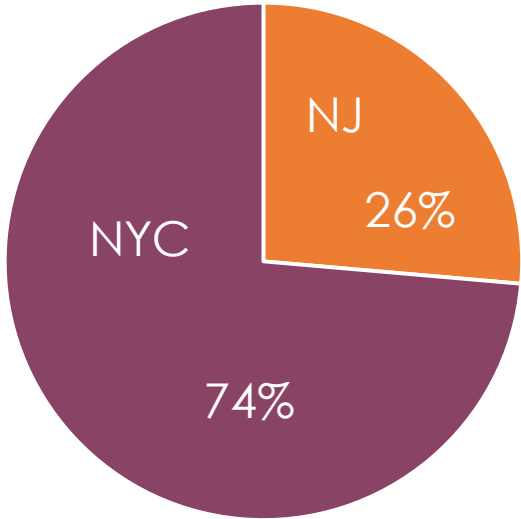
Of the New Jersey maritime firms surveyed, 36 percent of their employees' commute from New York City, 9 percent from New York State, and 4 percent from outside of the Port of NY/NJ. Support/freight has the highest commuting percentage, with 51 percent of survey respondents' employees coming from outside New Jersey, while recreation has the lowest with only 15 percent of its employees commuting into New Jersey.



INDUSTRY BREAKDOWN BY LOCATION

Jobs vs. # of Organizations

Share of Jobs



Of the firms who responded to the survey, support/freight and passenger organizations on the New Jersey side have a larger proportion of jobs, despite having fewer organizations. This indicates that firms on the NJ side are on average larger than those in NYC.

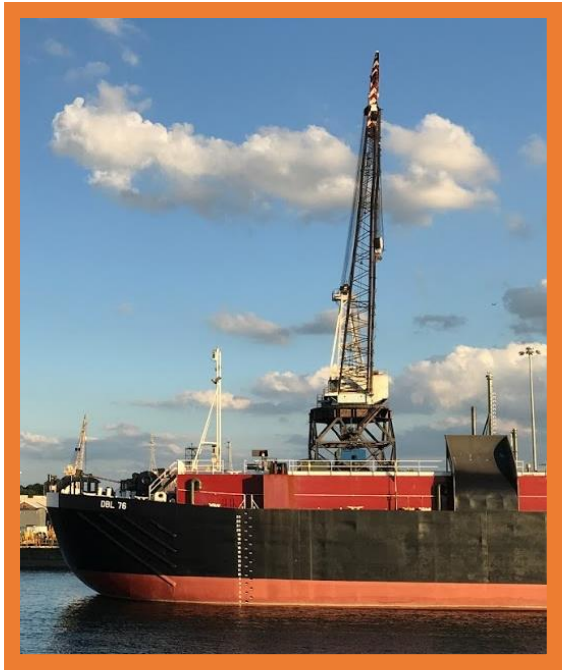
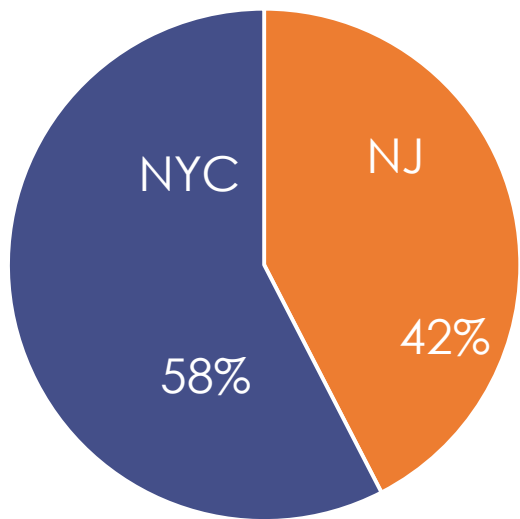
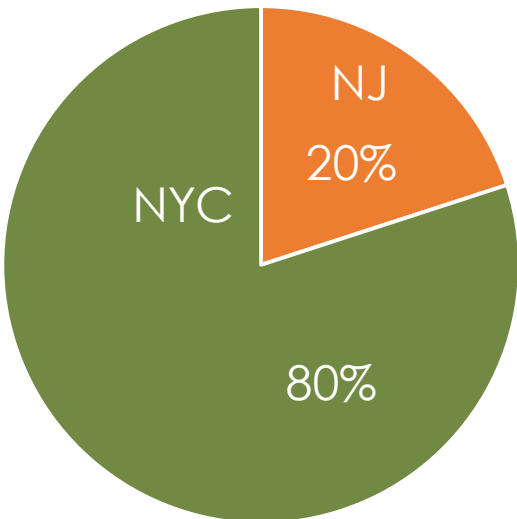
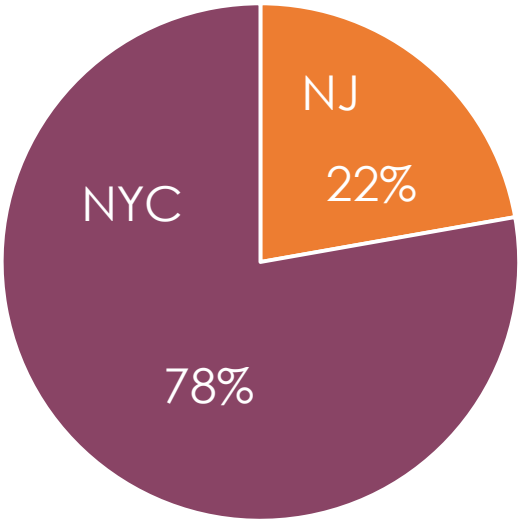
The opposite is true for recreation. There are fewer recreation jobs per organization in New Jersey than in New York City.

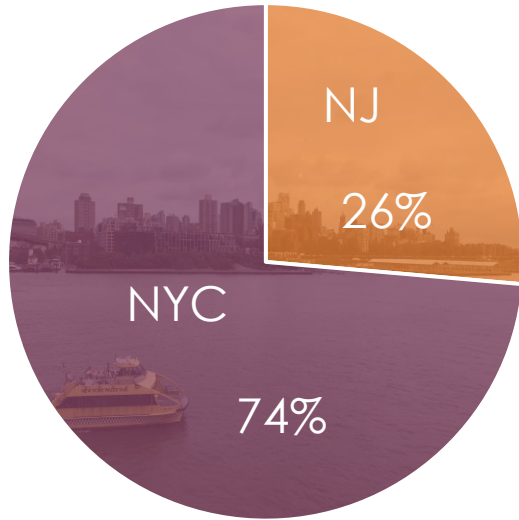
PASSENGER

RECREATION

SUPPORT/FREIGHT

Share of Organizations



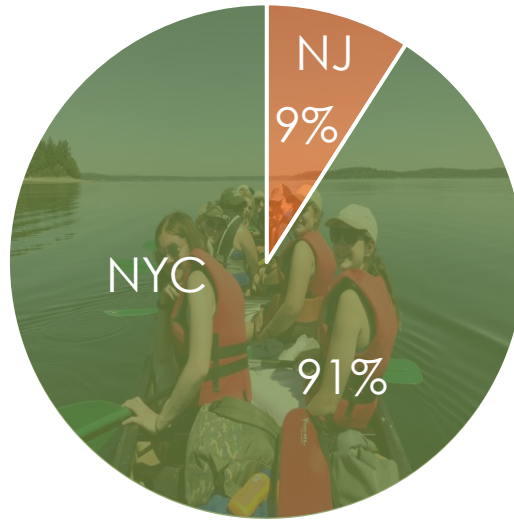


PASSENGER

1,790 - 2,860 Jobs

Average # of
employees:

112 -178

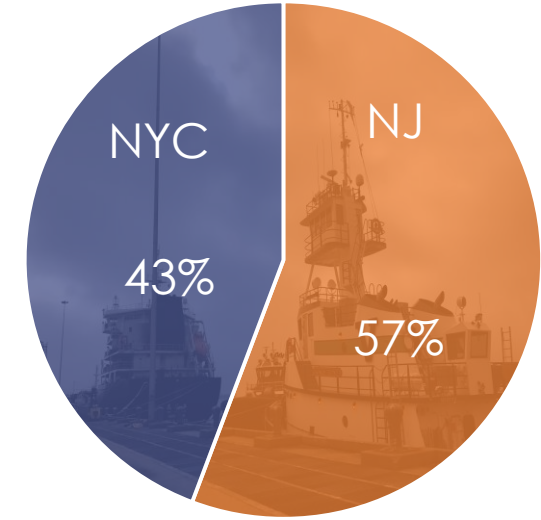


RECREATION

520 - 1,050 Jobs

Average # of
employees:

13 -26



SUPPORT/FREIGHT

5,940 - 8,920 Jobs

Average # of
employees:

110 – 165*

On average, passenger and support/freight firms have more employees than recreation. While support/freight firms have the most jobs overall, passenger maritime organizations have a slightly higher average number of employees per firm.

The average number of employees per organization in **freight: cargo & commodity terminals is between 177 and 264. Significantly higher than support/freight as a whole.*

Does your organization rely on the help of volunteers?

Recreational organizations rely heavily on the help of volunteers, whereas passenger and support/freight do not. Of those surveyed, 11 recreation groups are completely volunteer-based, representing 28 percent of respondents in that subsector. Another 57 percent of recreation organizations rely on volunteers to operate their business all or some of the time. In comparison, no support/freight or passenger organizations who answered the survey are completely volunteer operated and only 8 percent and 12 percent of their businesses respectively use volunteers.

Business Size By # of employees

16 Passenger

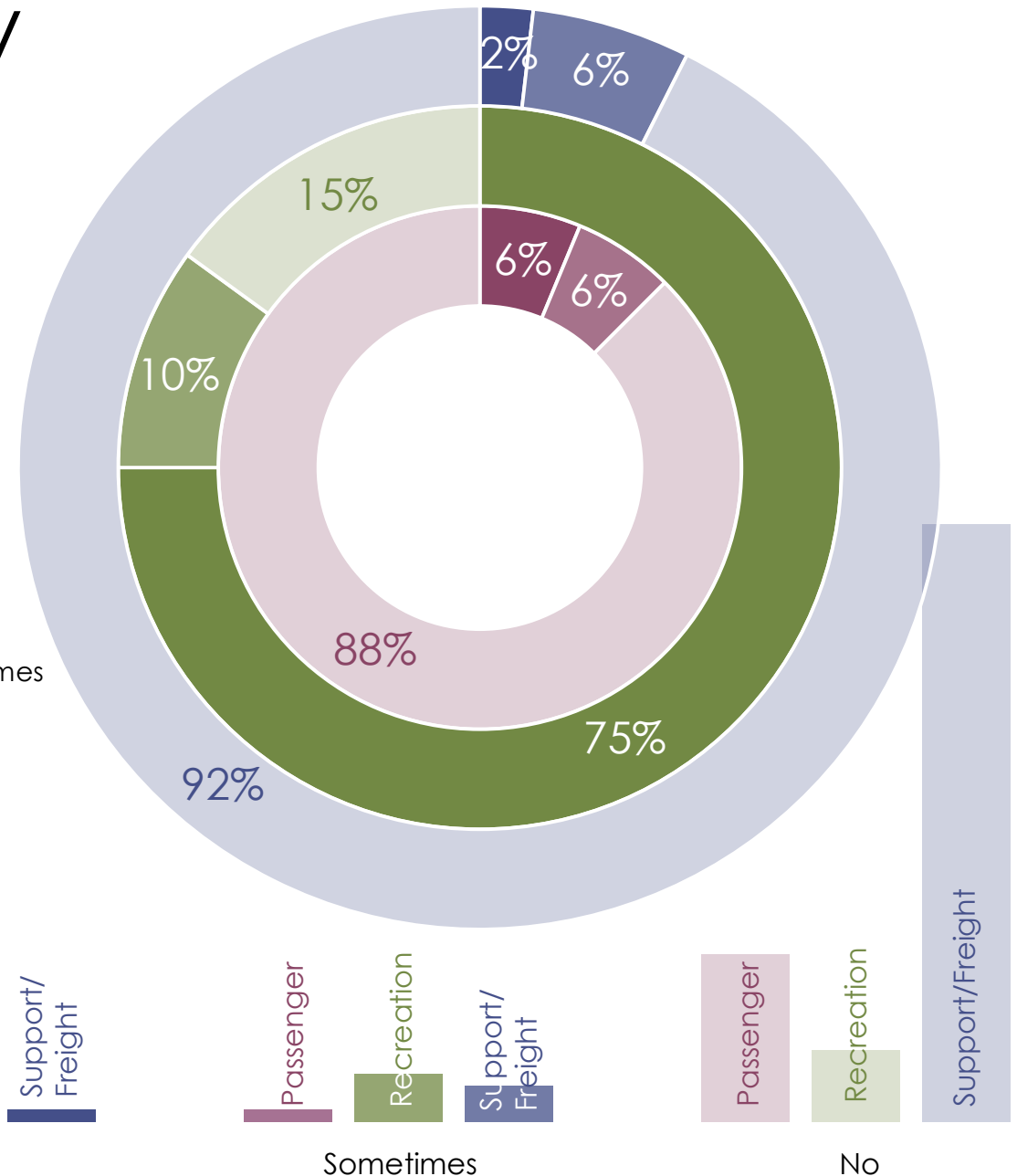
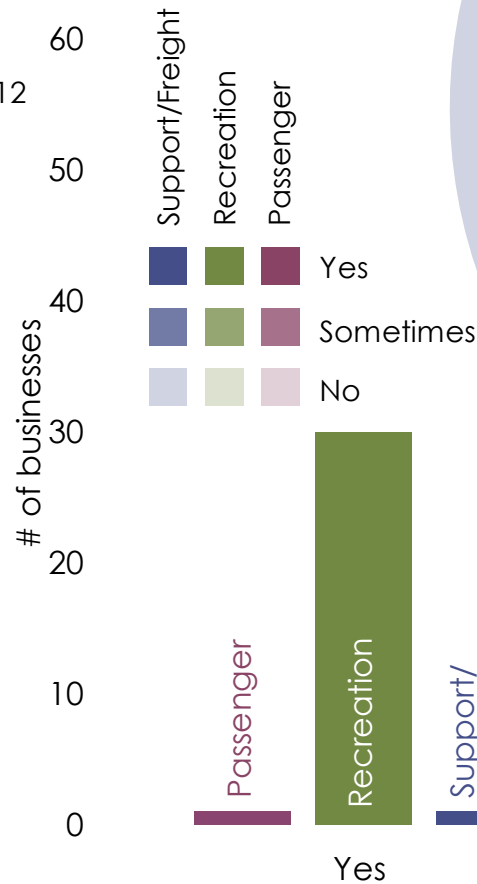
- 7 Small (1-50 Employees)
- 7 Medium (50-250 Employees)
- 2 Large (250+ Employees)

40 Recreation

- 11 All Volunteer
- 27 Small (1-50 Employees)
- 1 Medium (50-250 Employees)
- 1 Large (250+ Employees)

54 Support/Freight

- 30 Small (1-50 Employees)
- 16 Medium (50-250 Employees)
- 8 Large (250+ Employees)*



*Half of the 250+ employee businesses in support/freight are cargo terminals

All Respondents



8 in 10
Employees (82%)
are Full Time*

Passenger



7 in 10 Employees (67%) are Full Time

Recreation



6 in 10 Employees (59%) are Full Time

Support/Freight



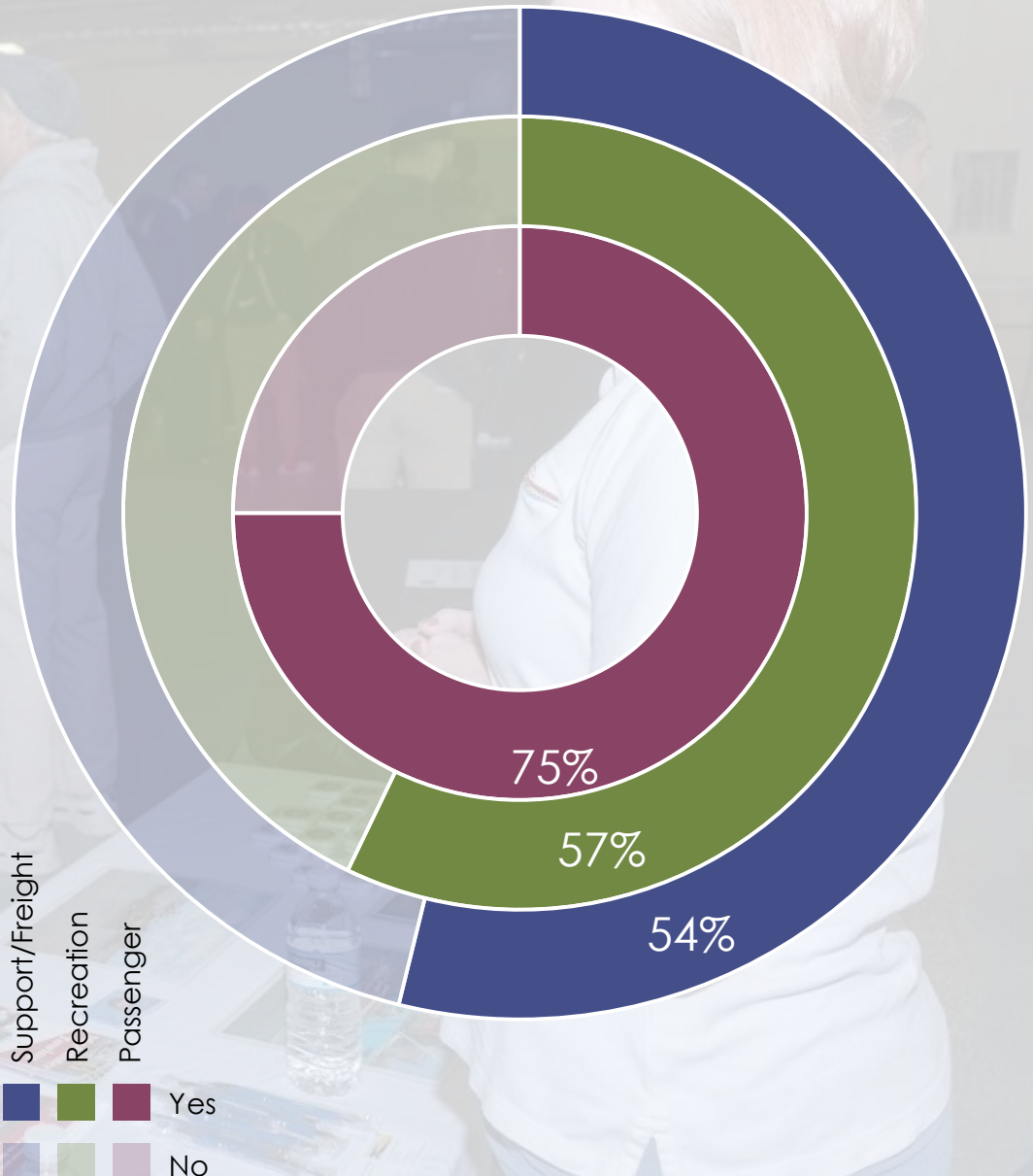
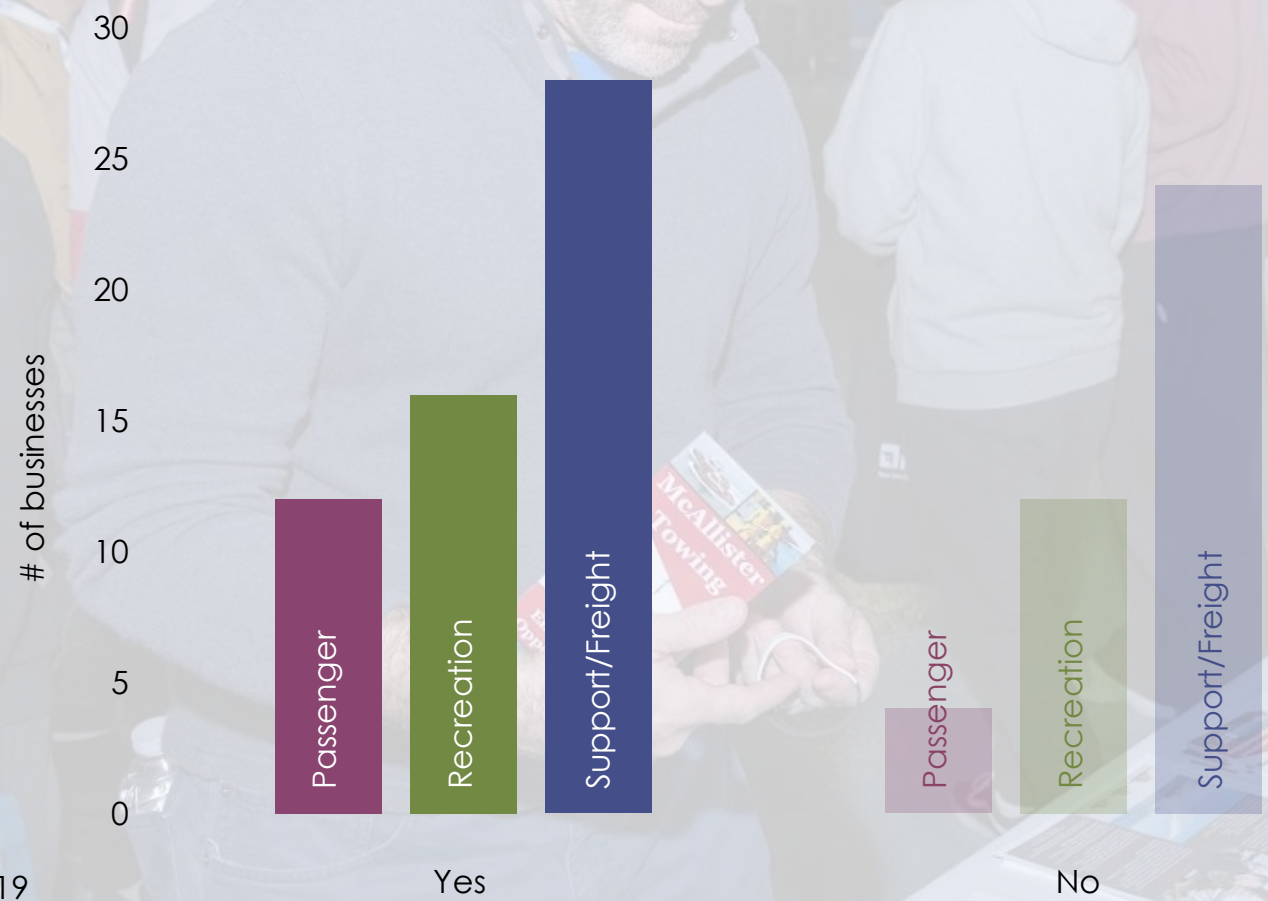
9 in 10 Employees (90%) are Full Time

*Percentage of employees who are full time normalized by number of employees in each organization

In addition to having fewer employees on average per organization, a smaller percentage of workers in maritime recreation are employed full-time. Only 59 percent of recreational employees are full-time compared to 67 percent of passenger and 90 percent of support/freight survey respondents.

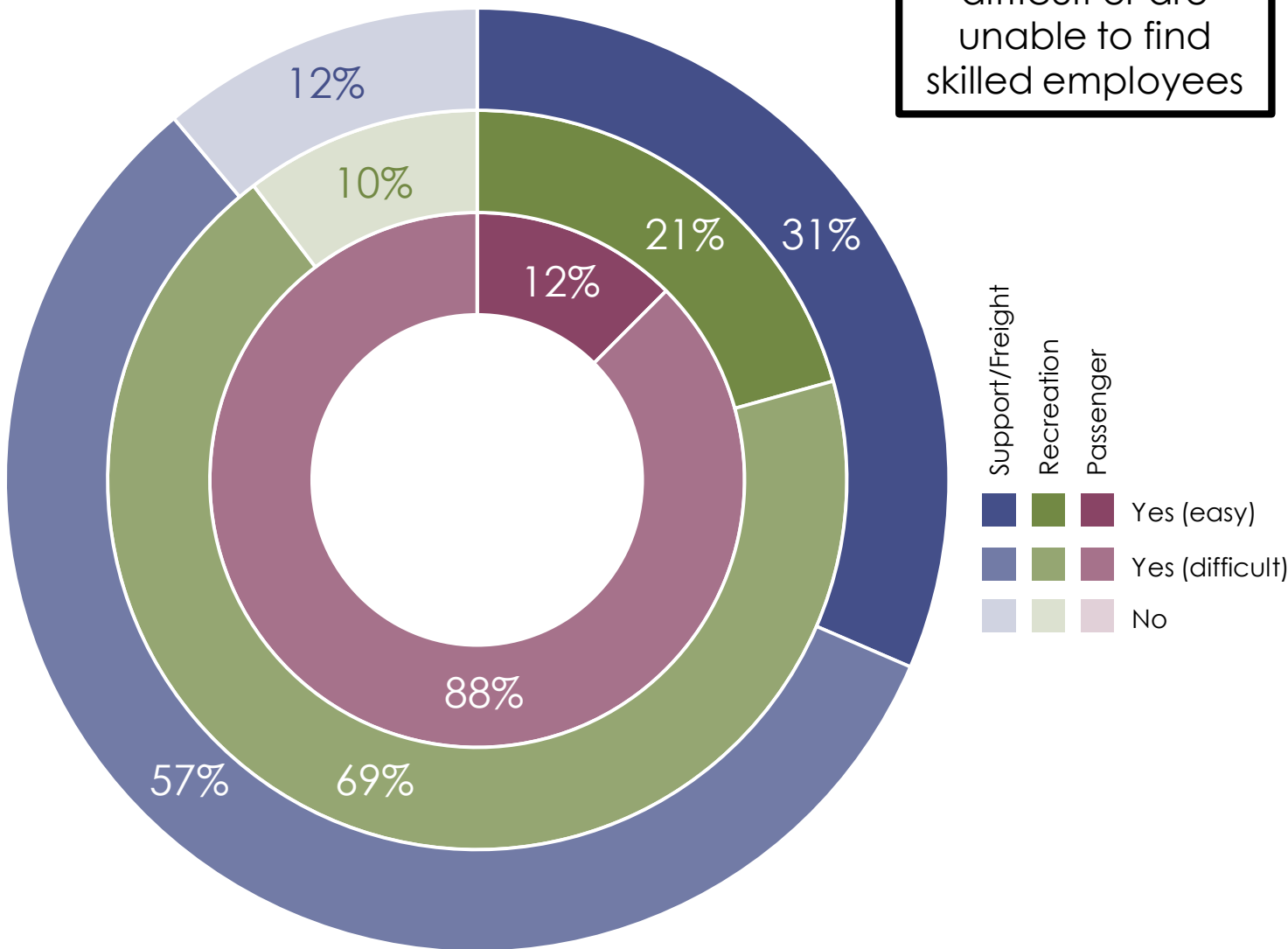
Are you hiring?

58%
of survey
respondents
are hiring



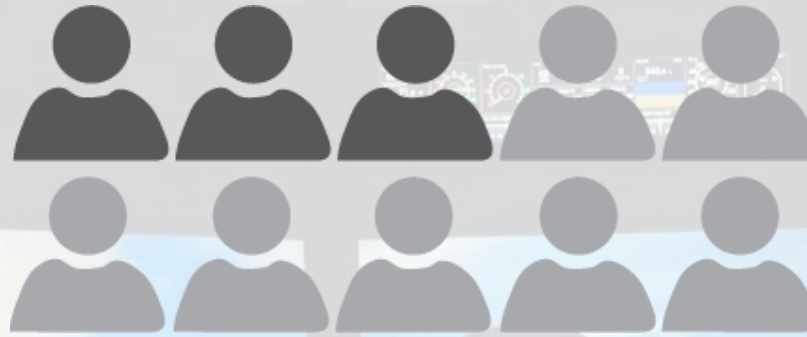
Are you able to find skilled employees?

75%
of survey
respondents find it
difficult or are
unable to find
skilled employees



31 percent of support/freight firms find it easy to recruit skilled employees, compared to 21 percent for recreation and 12 percent for passenger. Regional maritime academic programs, like those found at SUNY Maritime and City University of New York (CUNY) Kingsborough, as well as organizations like the Seafarers International Union and the International Longshoreman's Association, provide clear pathways for entry into the field. Despite these institutions, support/freight also has the largest proportion of survey respondents who are unable to find skilled employees (12%). Overall, 75 percent of survey respondents find it difficult or are unable to find skilled employees. Investment in workforce development would be beneficial to close existing skills gaps and connect qualified candidates to jobs in the maritime industry.

All Respondents



Passenger



2 in 10 Employees (24%) are Female

Recreation



5 in 10 Employees (47%) are Female

Support/Freight



2 in 10 Employees (23%) are Female

*Percentage female employees normalized by number of employees in each organization

According to the survey results, men are over-represented in the maritime industry. Although recreational organizations have a nearly balanced gender ratio, 8 in 10 passenger and maritime support/freight subsector workers are male. The low representation may be due, anecdotally, to the uniformed services serving as a strong career pipeline for maritime jobs. According to the Council on Foreign Relations, only 16 percent of the U.S. military is female. Similarly, the 2018 student population at SUNY Maritime was only 12 percent female. Because military service and maritime educational institutions are widely accepted as pipelines into the maritime industry, men are more likely to be exposed to maritime jobs.

All Respondents



4 in 10
Employees (40%)
are Non-White*

Passenger



6 in 10 Employees (57%) are Non-White

Recreation



3 in 10 Employees (32%) are Non-White

Support/Freight



4 in 10 Employees (36%) are Non-White

*Percentage non-white employees normalized by number of employees in each organization

Similar to scarce female representation, people of color—of all genders—are underrepresented in Port of NY/NJ maritime operations. According to the U.S. Census Bureau, New York City and the six New Jersey counties surrounding New York (Monmouth, Middlesex, Union, Essex, Hudson & Bergen) are 55 percent non-white. While the demographics of passenger organizations are reflective of the region, white employees are overrepresented in the support/freight and recreation sub-sectors.

On average how long
do employees stay
with the company?

9 Years

PASSENGER

8 Years

RECREATION

5 Years

SUPPORT/FREIGHT

11 Years

According to the U.S. Bureau of Labor Statistics (2018), the average American worker has been at their current job for 4.2 years. The NY/NJ maritime businesses that were surveyed retain their employees for twice as long as the U.S. Average.

What is the
average age of
your employees?

41

PASSENGER

39

RECREATION

39

SUPPORT/FREIGHT

42

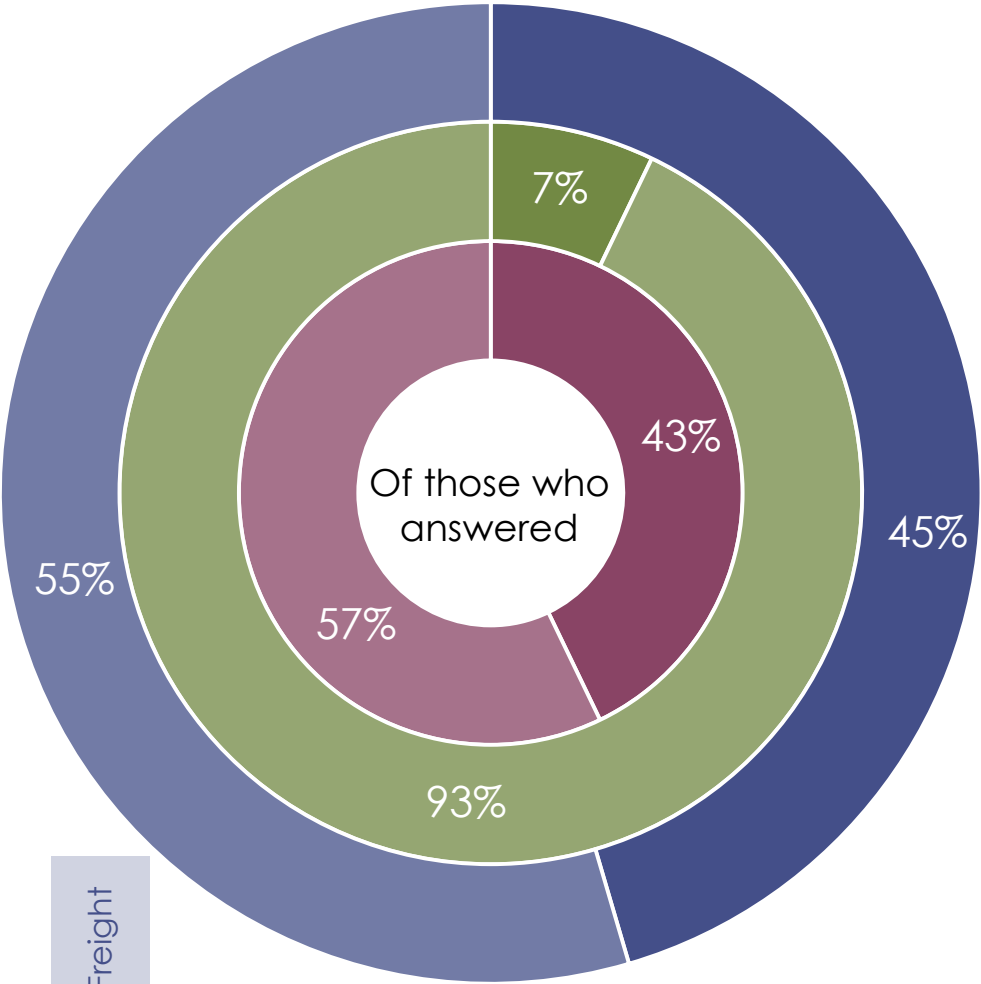
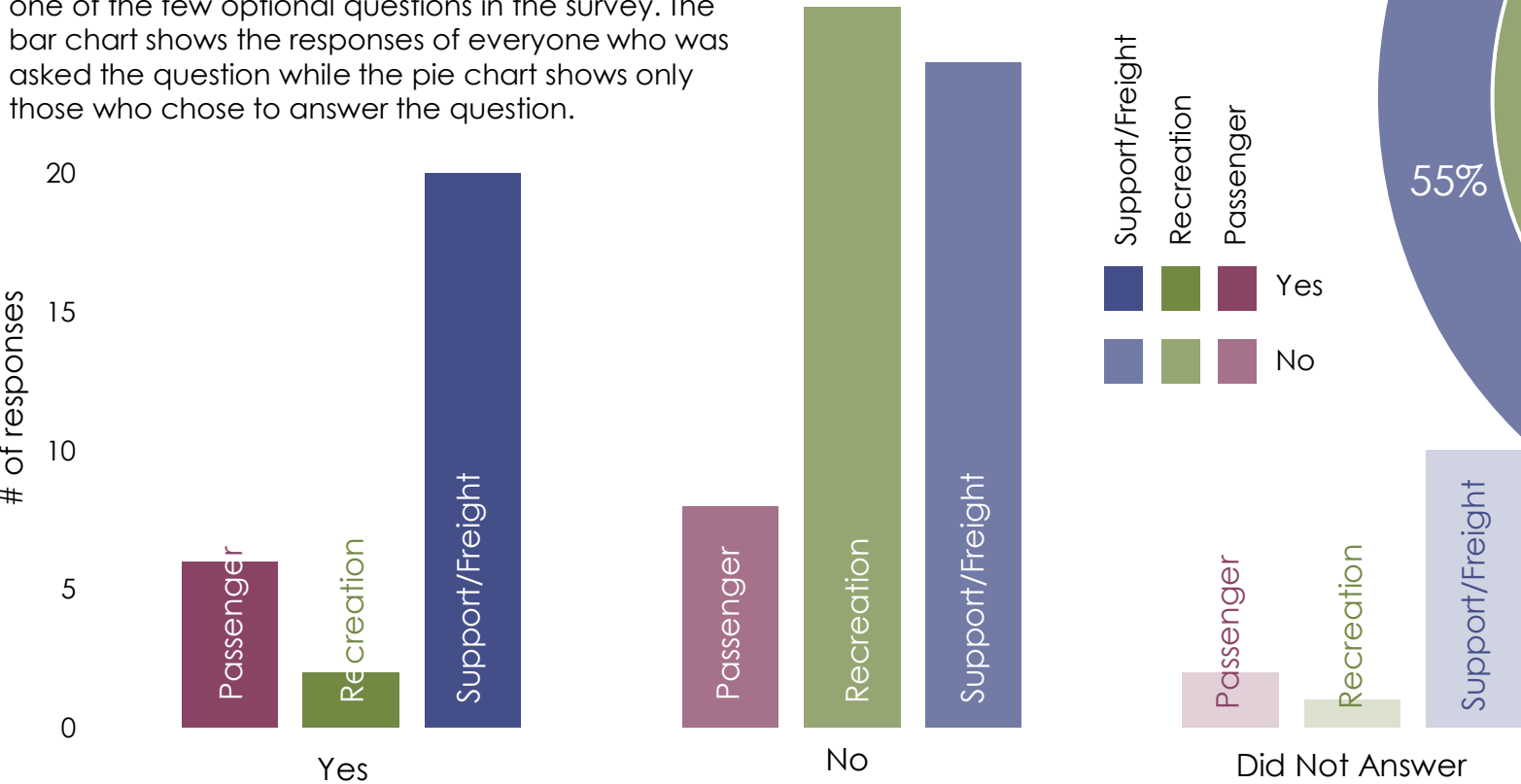
According to the U.S. Bureau of Labor Statistics (2018), the average age for ship and boat builders is 41.7, on par with the average age of maritime support/freight employees captured by this survey. The average age for "Water Transportation" is 45, older than that of survey respondents.



Are your employees members of a trade union?*

*Due to the sensitive nature of this question, this was one of the few optional questions in the survey. The bar chart shows the responses of everyone who was asked the question while the pie chart shows only those who chose to answer the question.

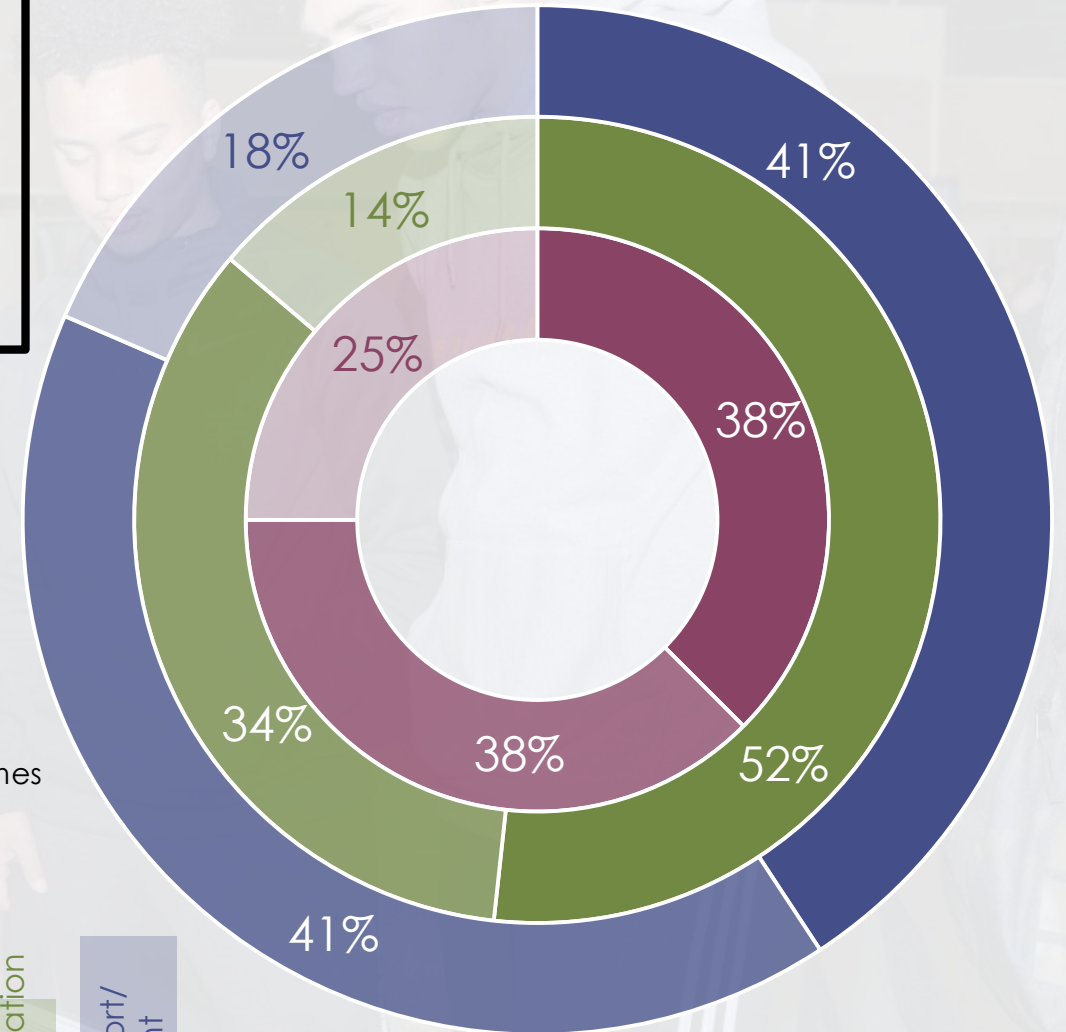
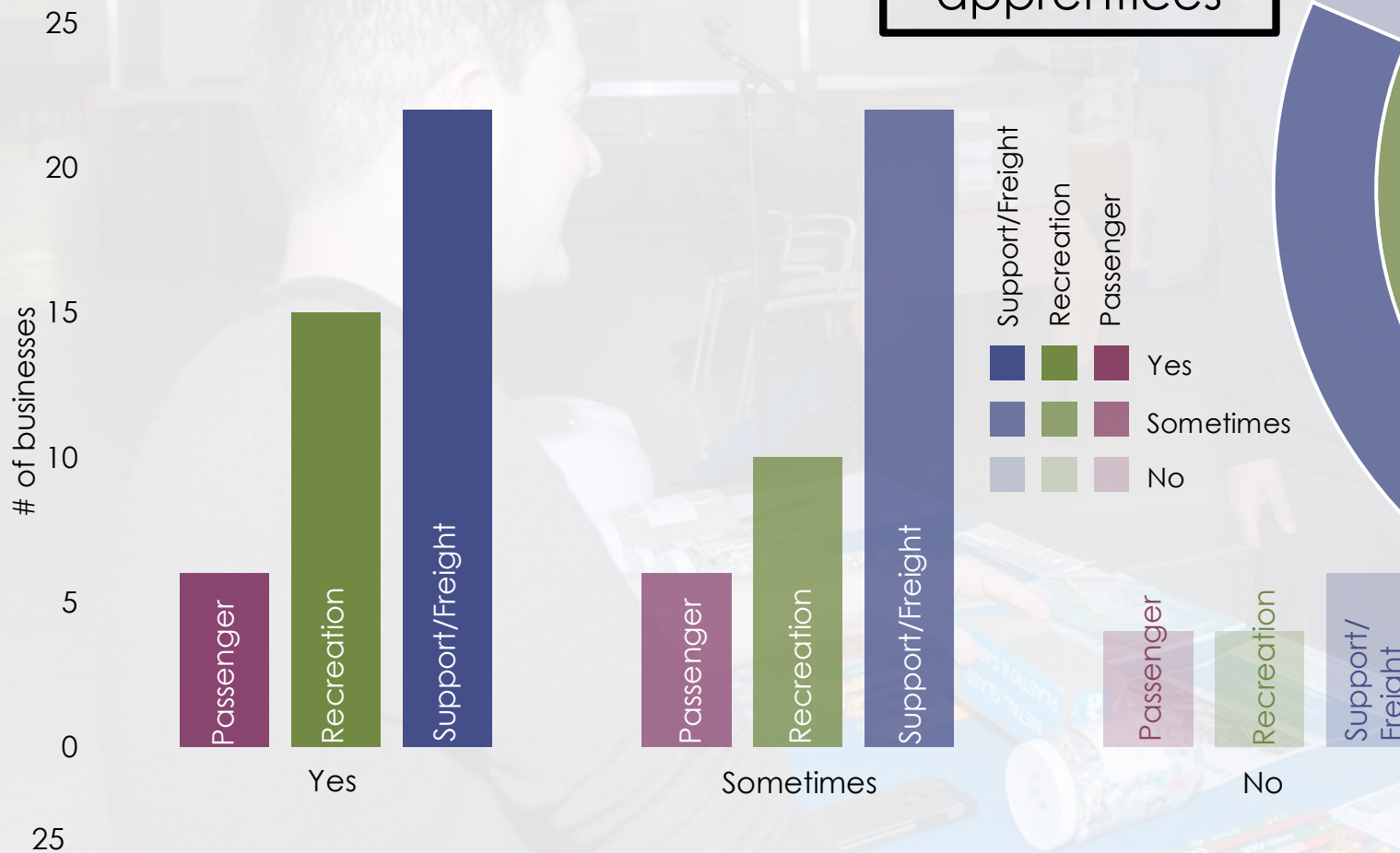
33%
of those who answered have employees that are part of a trade union



When compared to the national unionization rate of 10 percent, passenger and maritime support/freight firms in the Port of NY/NJ are well above the average while passenger is slightly below. Even when only looking at unionization rates for all businesses in all sectors, maritime and non-maritime, in New York City (24.2%) and New Jersey (14.9%), the passenger and support/freight firms that chose to answer have higher rates of unionization.

Do you host interns or apprentices ?

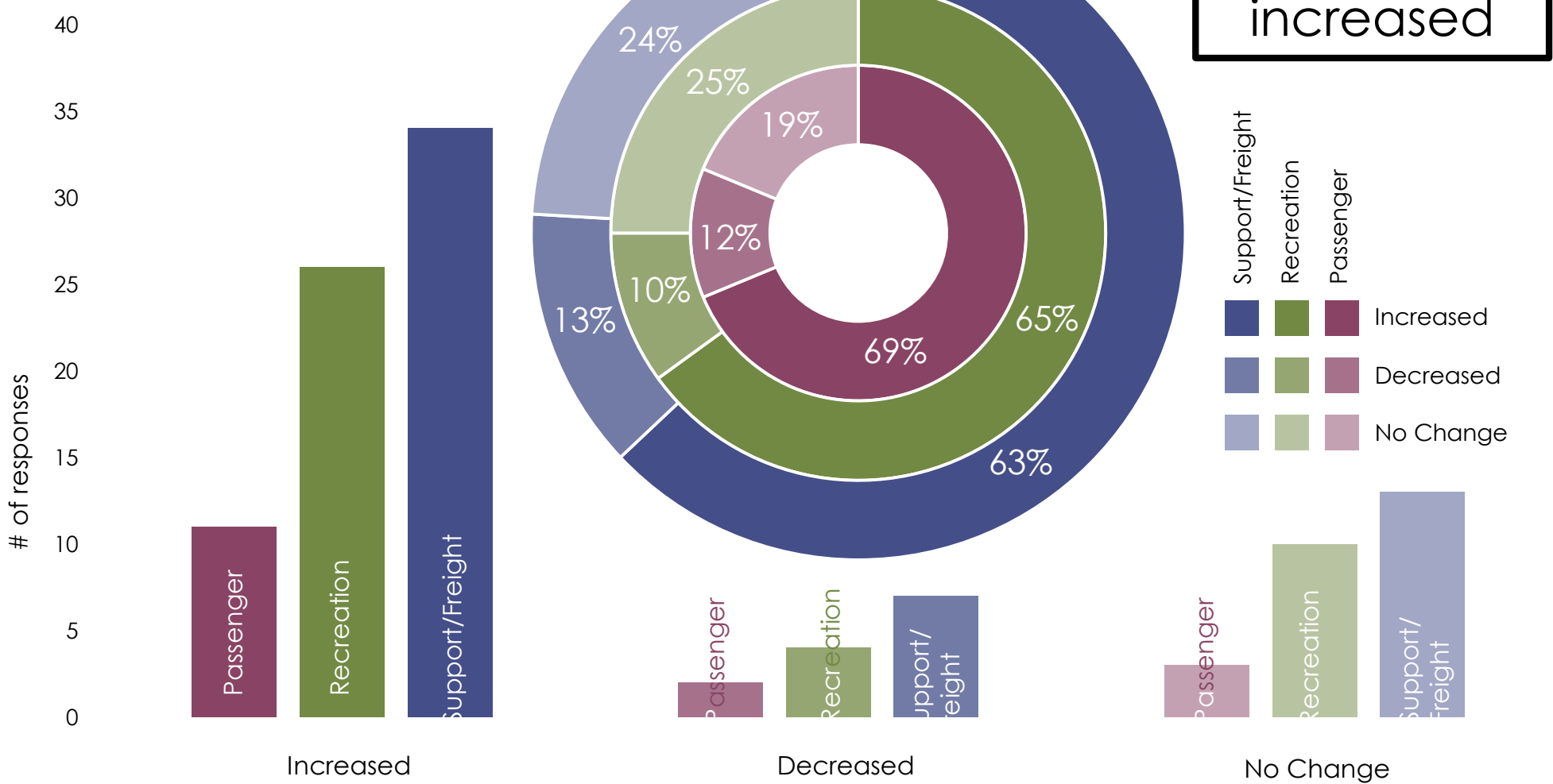
82%
of survey
respondents
have hosted
interns or
apprentices



III. Industry & Business Sentiment/Needs



How has your organization's revenue changed in the last 10 years?

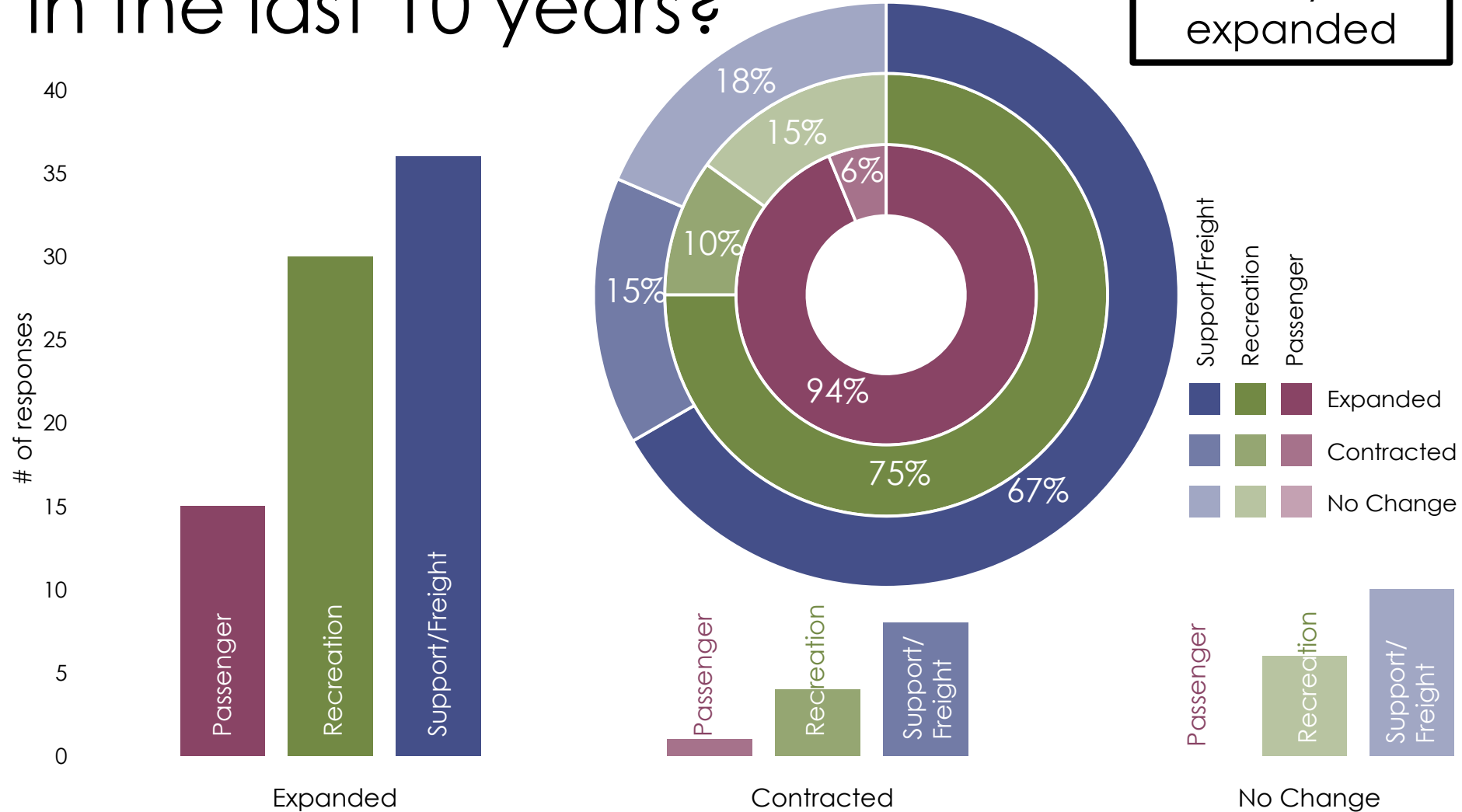


Although the 2019 SHS did not inquire how overall expenses have changed since the 2007 survey, the majority of businesses reported an increase in revenue. The overall reported sentiment is that the industry is growing.



How has the industry your business operates in changed in the last 10 years?

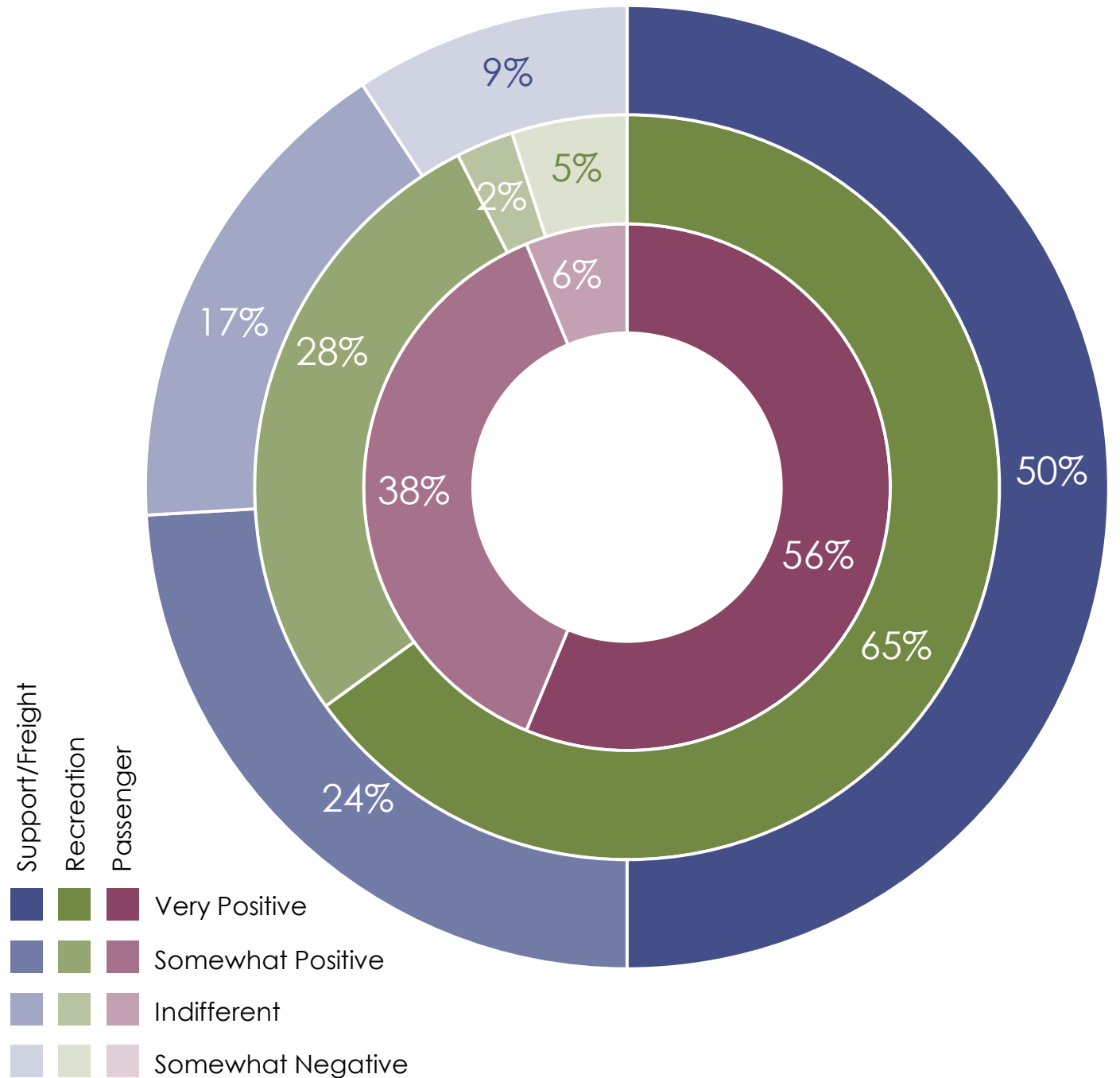
74% of respondents think their industry has expanded



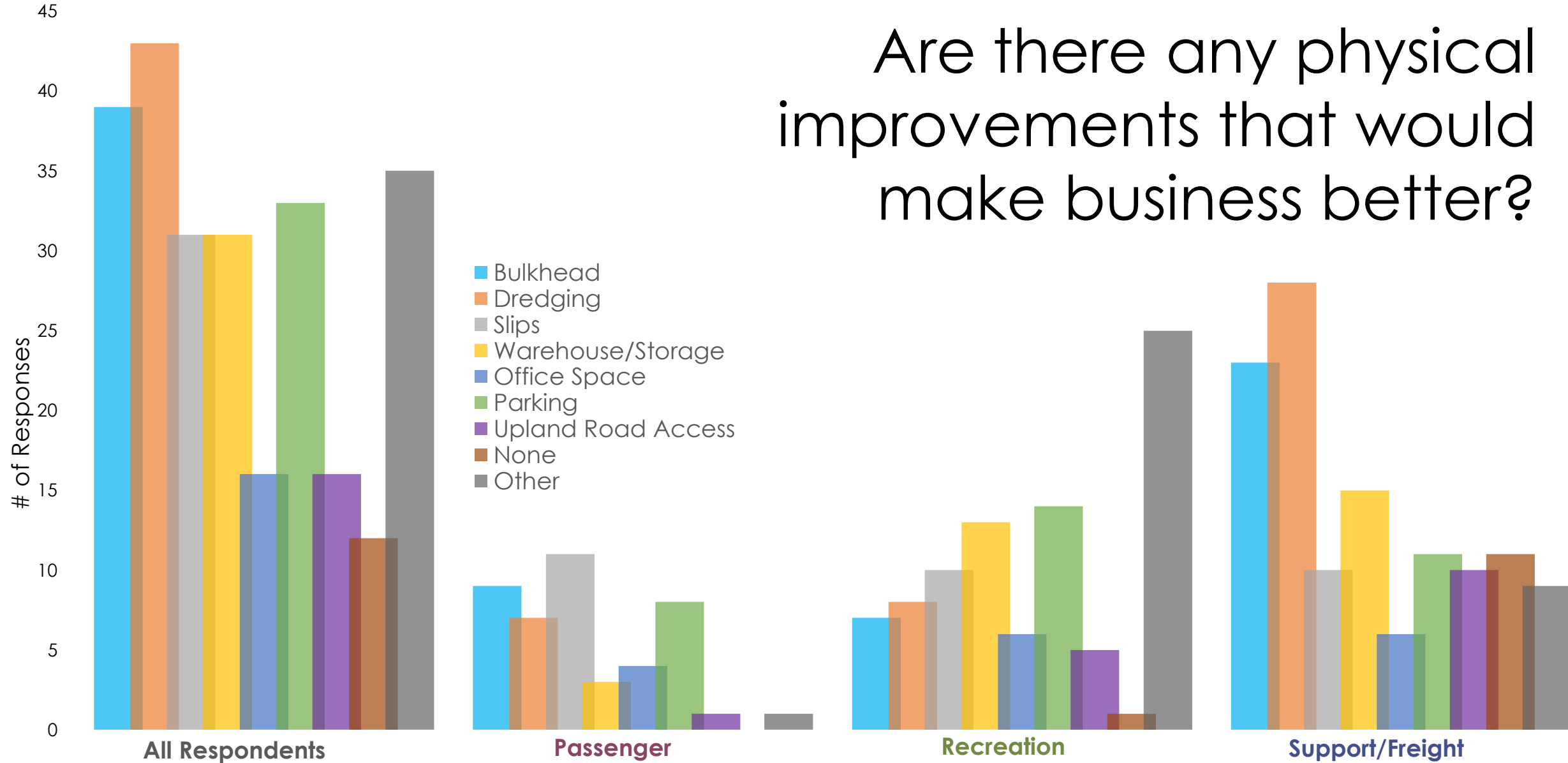
How are your maritime activities perceived by your neighbors and nearby upland communities?

84%

of respondents believe there neighbors have a positive view of their maritime activities

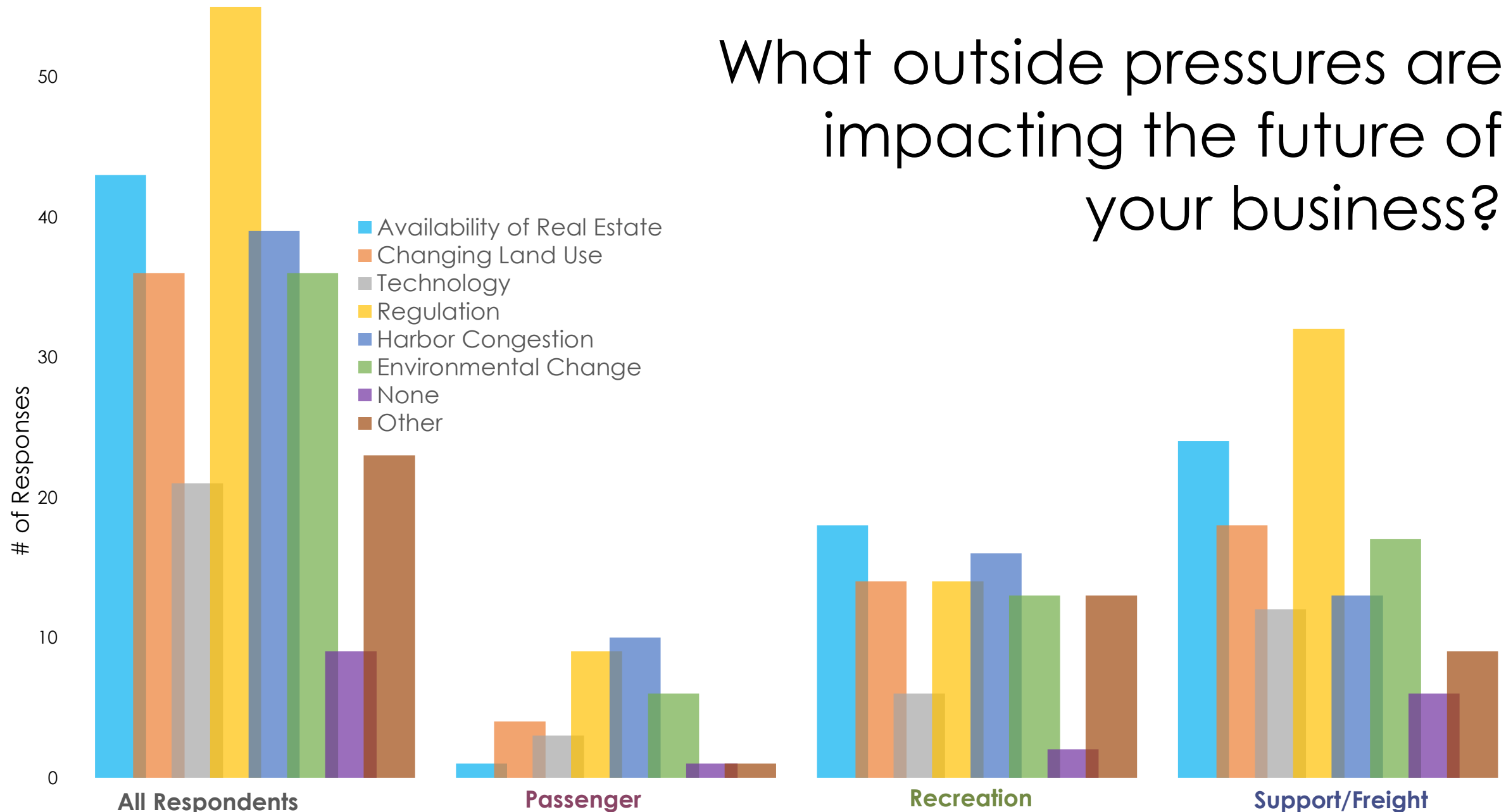


Are there any physical improvements that would make business better?



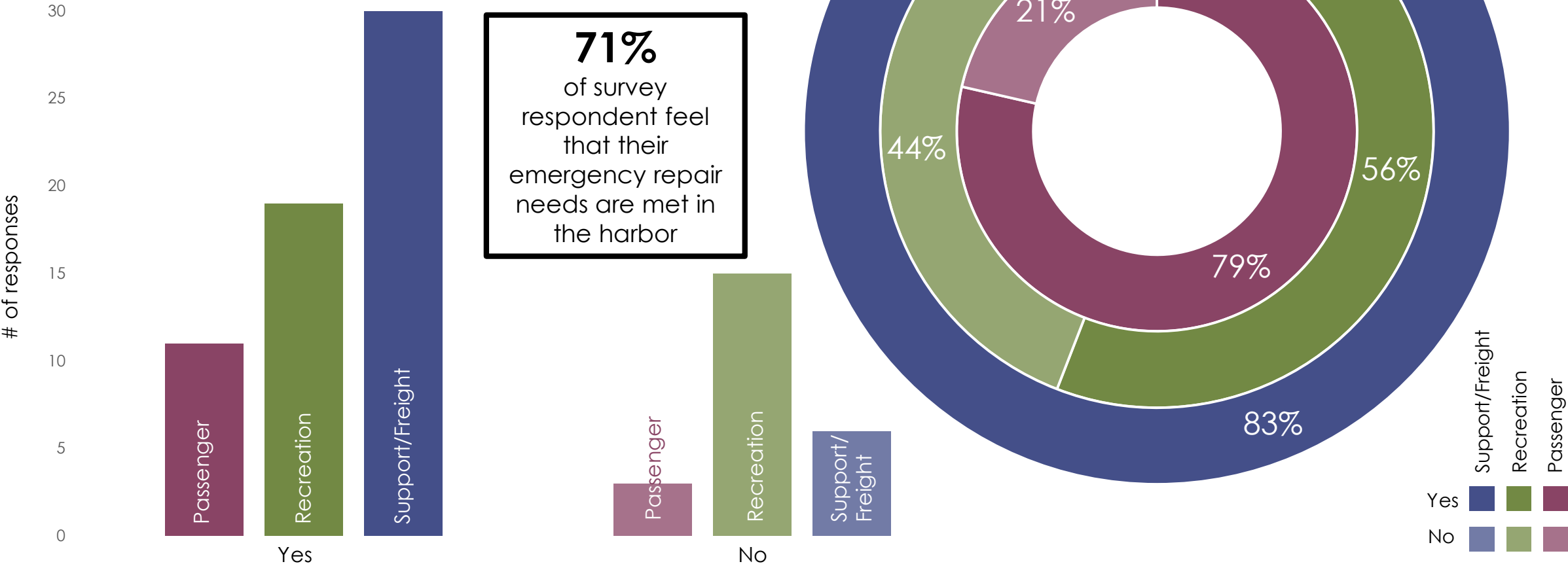
Overall, survey respondents cited dredging and bulkhead repair as the main improvements needed to make business better. However, when broken down by sub-sector, passenger organizations most often identified need for slips, industrial organizations a need for dredging, and recreational organizations a need for parking. In addition to parking, recreation also had an overwhelming number of written in responses, all of which are listed in appendix ii on page 64.

What outside pressures are impacting the future of your business?



Overall, respondents cited regulation as the largest outside pressure impacting the future of their business. In the context of the survey, specific definitions of terms were not provided. How respondents chose to interpret terms like “regulation” was left to their own judgement. By subsector, passengers’ biggest pressure is harbor congestion, while recreation’s is the availability of real estate.

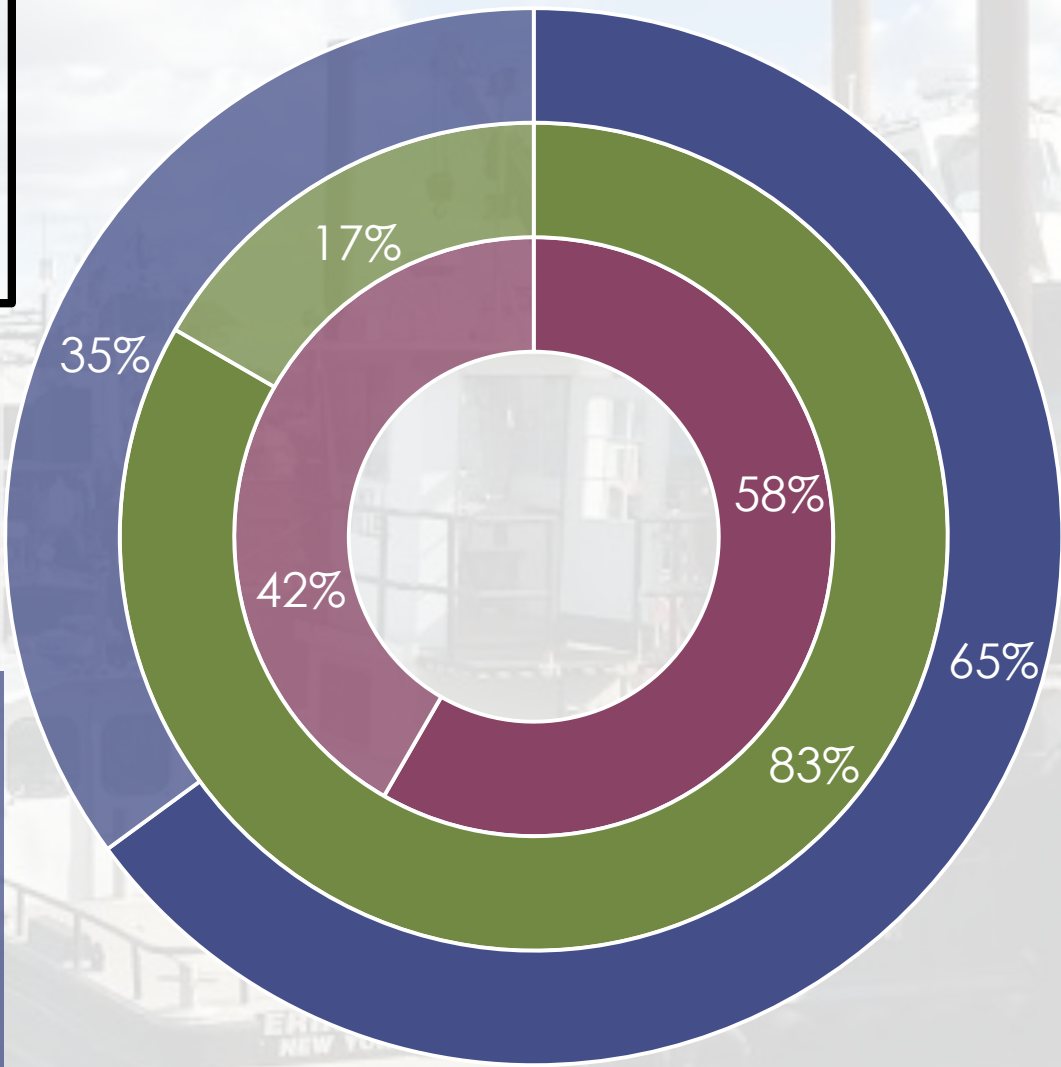
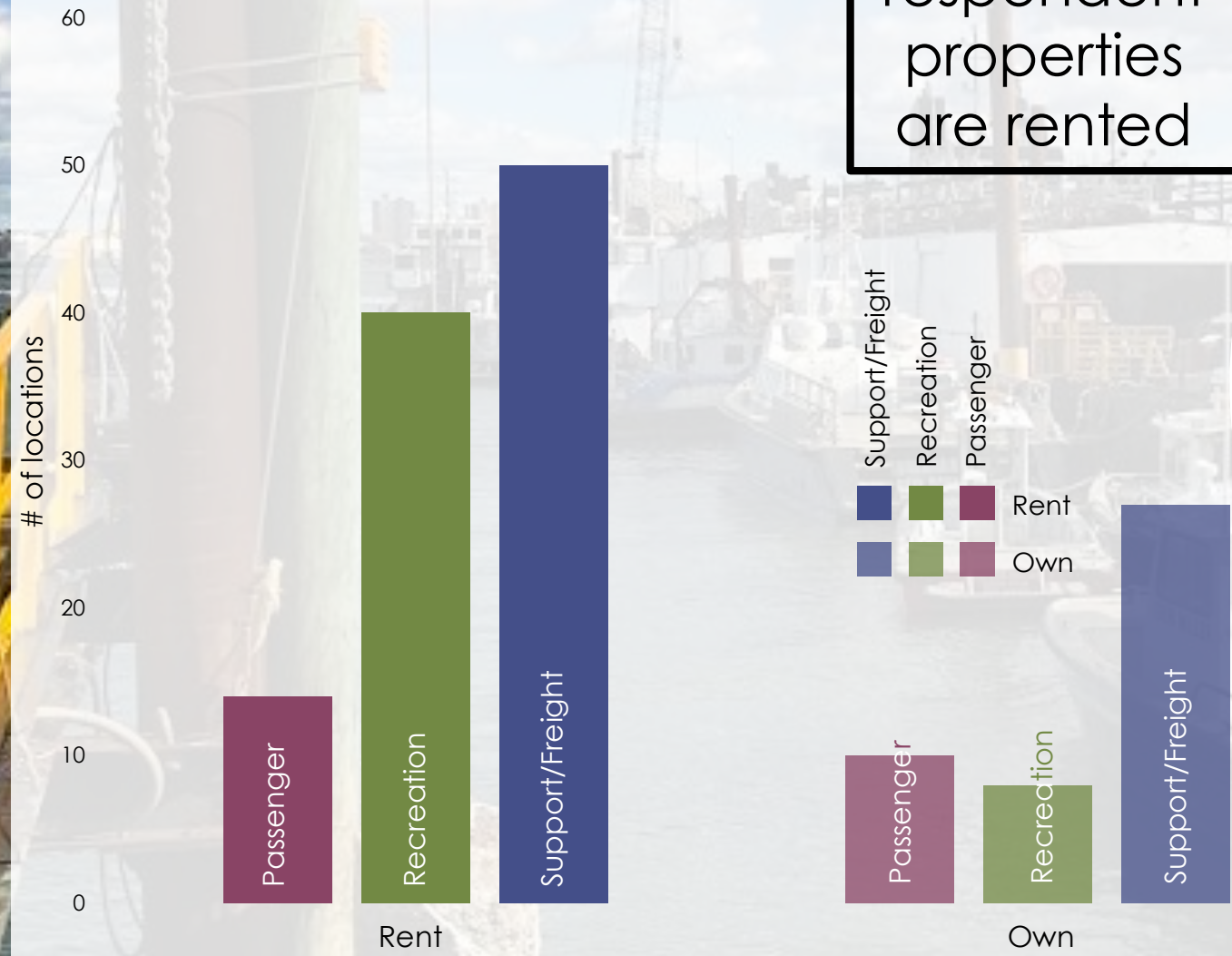
Do you feel that your vessels emergency repair needs are met in the NY/NJ harbor?



Based on the sample of non-maintenance establishments, 83 percent of support/freight and 79 percent of passenger respondents believe that their emergency vessel repair needs are met in the harbor, compared to only 56 percent of recreational users. Recreational users of the harbor may benefit from an increase in boat repair businesses.

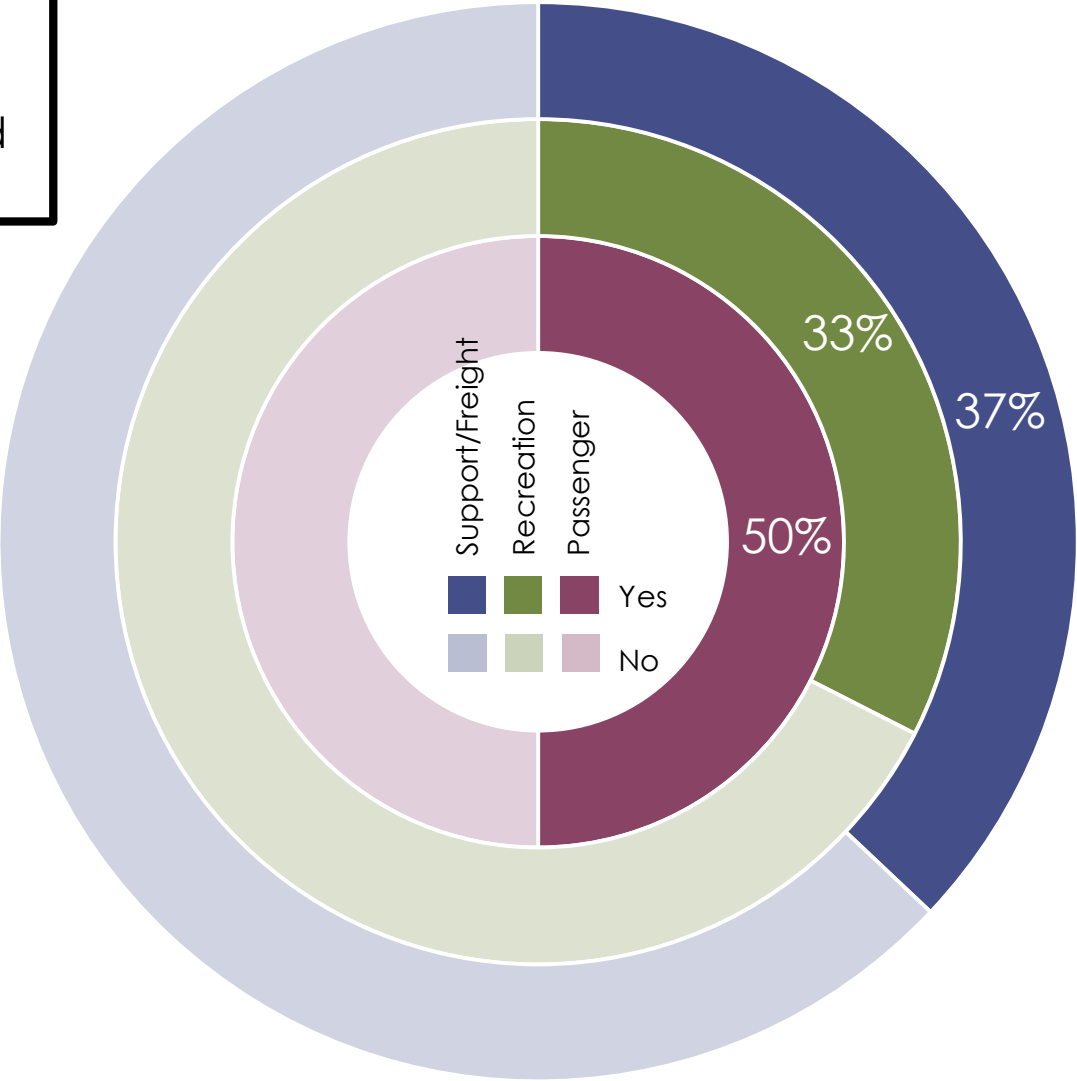
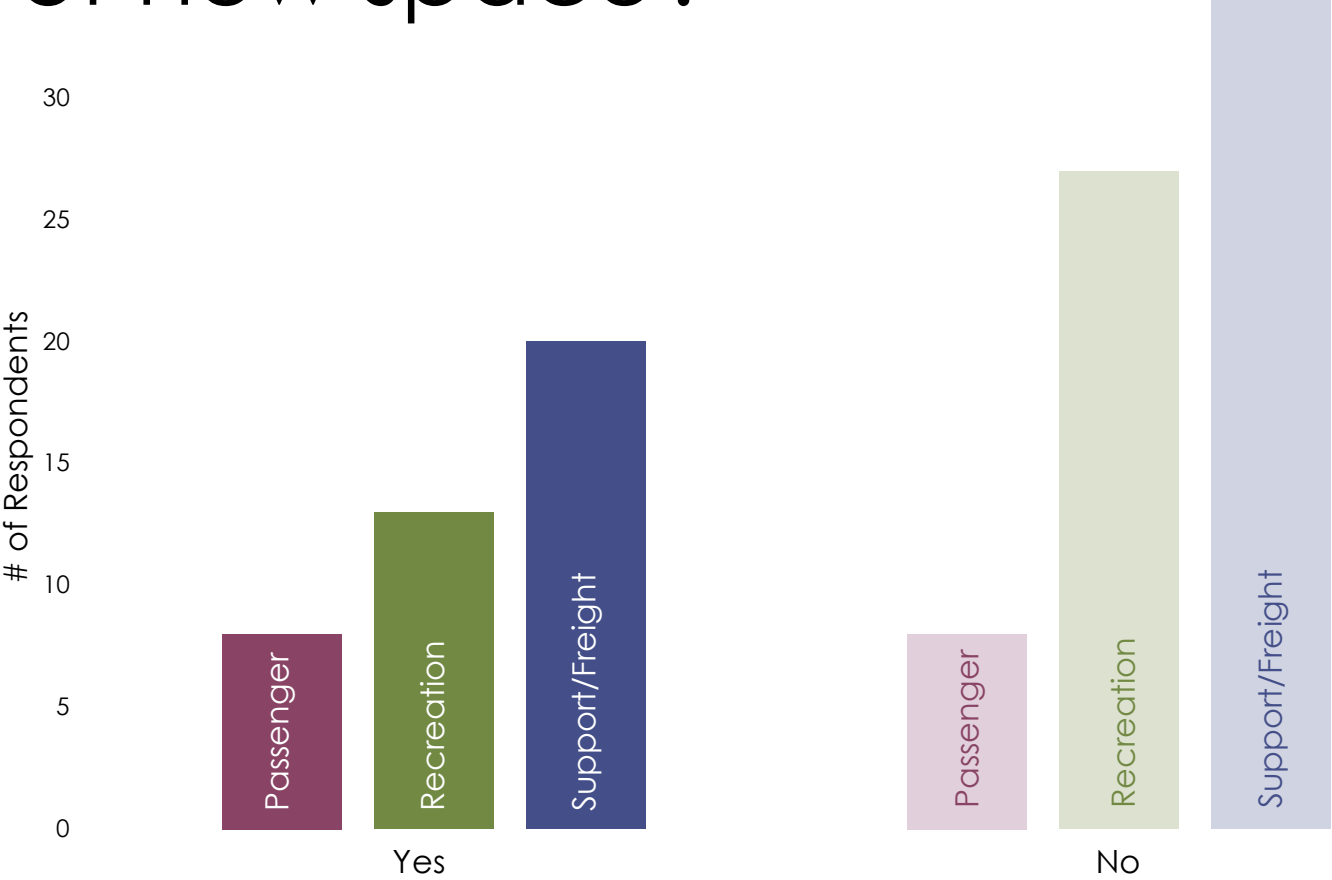
Do you rent or own this location?

70%
of survey
respondent
properties
are rented



Are you actively looking or in need of new space?

37%
of survey
respondents need
new space



Approximately 1/3 of maritime firms reported actively looking or needing new space. Half of all passenger-sector organizations who completed the survey are looking for new business locations.

IV. Location of Maritime Organizations In The Harbor

Freight: Cargo & Commodity Terminals

Recreational/Educational

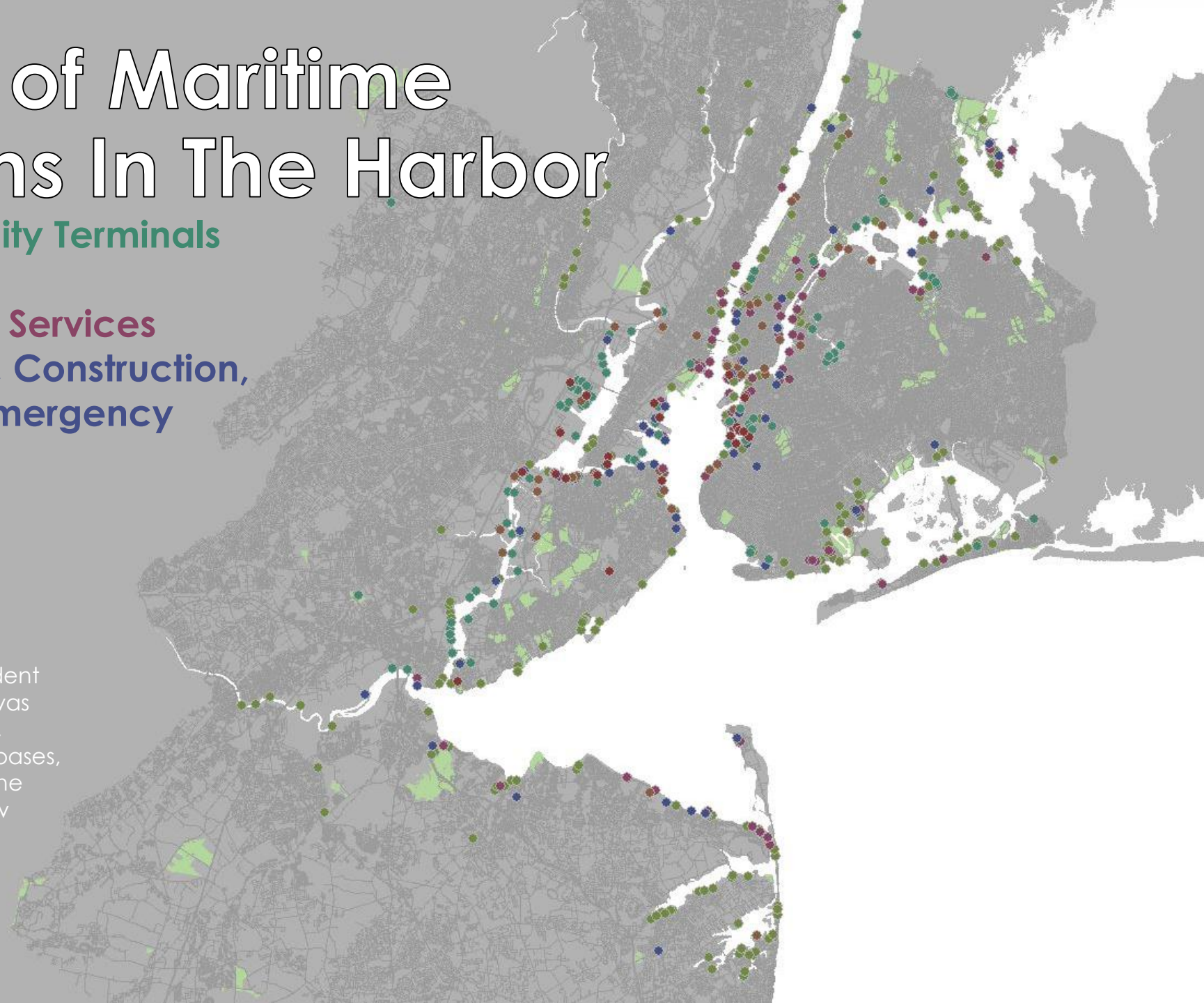
Ferry, Charter, & Excursion Services

**Maintenance, Ship Repair, Construction,
Waterfront Inspection, & Emergency
Response**

Other Maritime Businesses

Tug & Barge

In conjunction with the survey an extensive desktop research and mapping effort was conducted to identify all the water dependent organizations in the harbor. This database was created by combing through InfoUSA data, combining it with NJDOT, DPR, & DCP databases, as well as mailing lists and directories from the Port Authority, US Coast Guard, and the Tow Boat and Harbor Carriers Association, and reviewing aerial photography taken by NearMap.



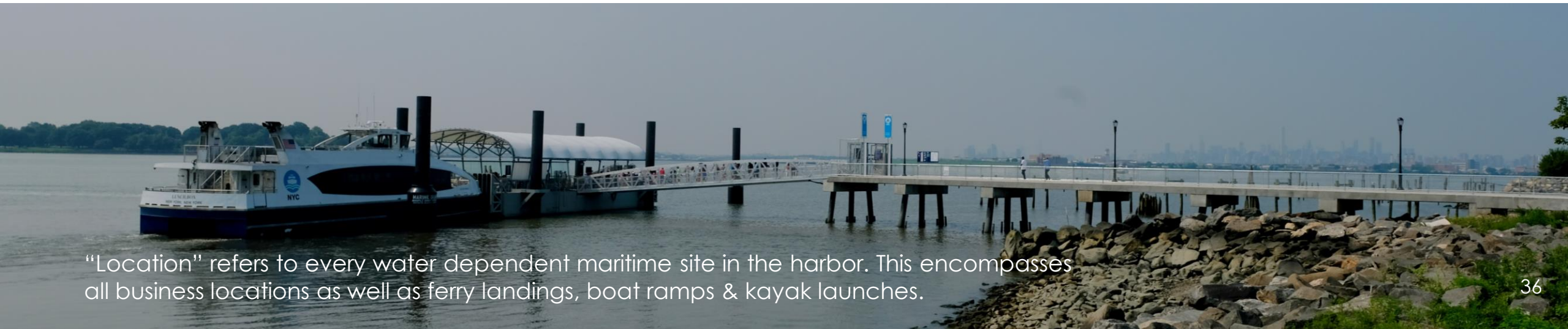
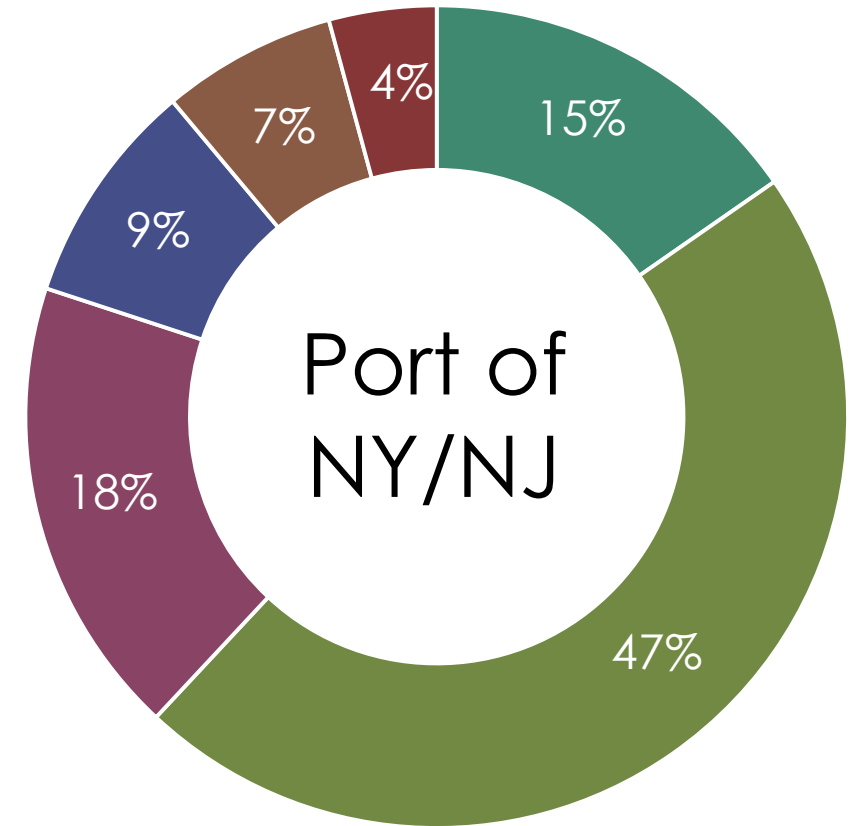
Industry Share

by # of locations in harbor

[757]

Locations

- 116** Freight: Cargo & Commodity Terminals
- 353** Recreational & Educational
- 137** Ferry, Charter, & Excursion Services
- 67** Maintenance, Ship Repair, Construction,
Waterfront Inspection & Emergency Response
- 52** Other Maritime Businesses
- 32** Tug & Barge

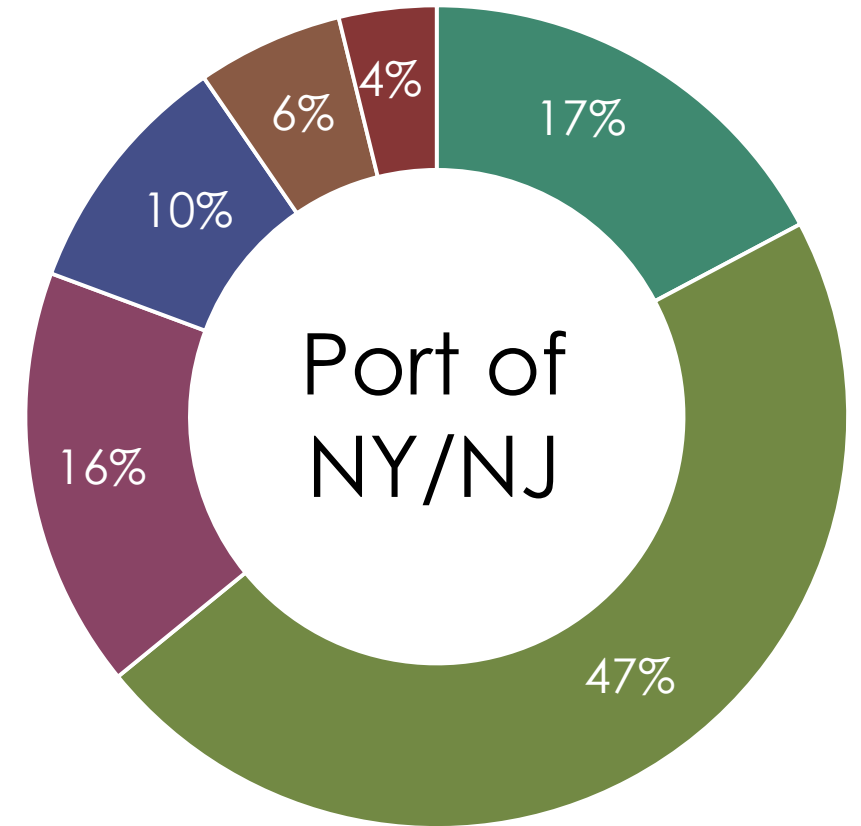


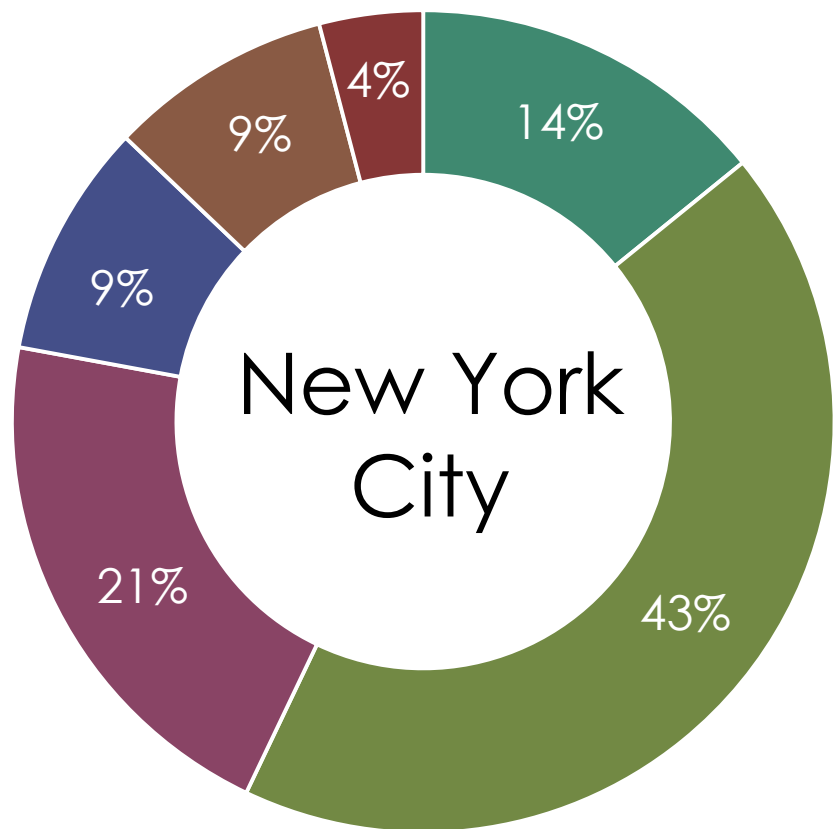
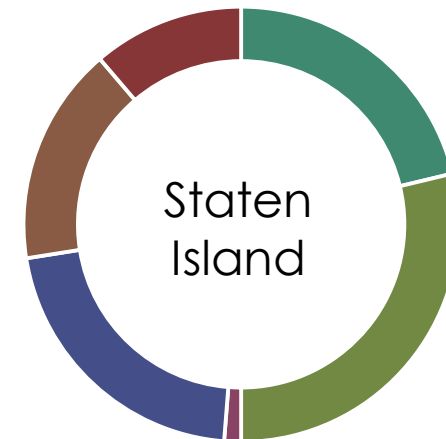
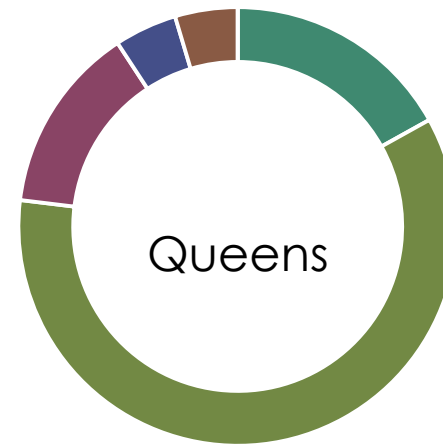
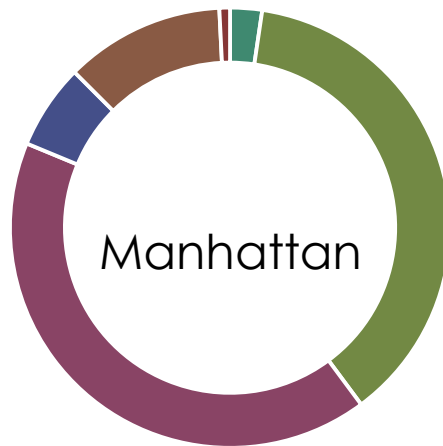
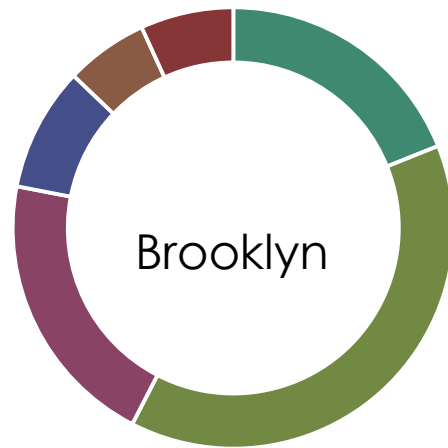
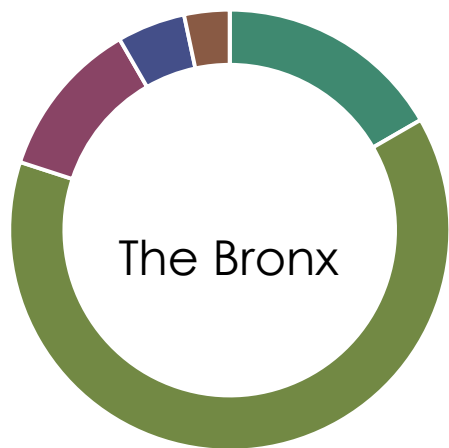
“Location” refers to every water dependent maritime site in the harbor. This encompasses all business locations as well as ferry landings, boat ramps & kayak launches.

Industry Share

by # of businesses in harbor [574]
Businesses

- 99 Freight: Cargo & Commodity Terminals
- 269 Recreational & Educational
- 95 Ferry, Charter, & Excursion Services
- 56 Maintenance, Ship Repair, Construction,
Waterfront Inspection & Emergency Response
- 33 Other Maritime Businesses
- 22 Tug & Barge





Industry Share

by # of locations in harbor

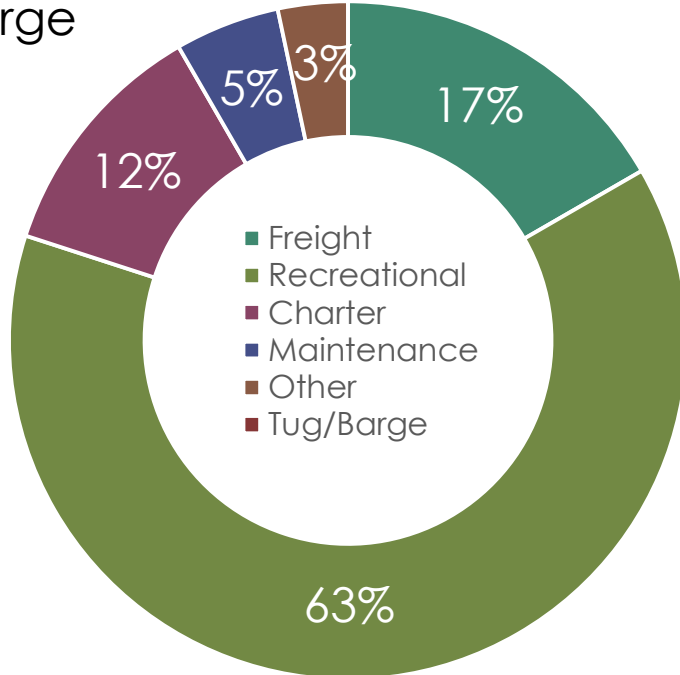
[466]
locations

- 66 Freight: Cargo & Commodity Terminals
- 200 Recreational & Educational
- 97 Ferry, Charter, & Excursion Services
- 43 Maintenance, Ship Repair, Construction,
Waterfront Inspection & Emergency Response
- 41 Other Maritime Businesses
- 19 Tug & Barge

The Bronx [60]

of locations

- 10 Freight: Cargo & Commodity Terminals
- 38 Recreational & Educational
- 7 Ferry, Charter, & Excursion Services
- 3 Maintenance, Ship Repair, Construction, Waterfront Inspection & Emergency Response
- 2 Other Maritime Businesses
- 0 Tug & Barge



Brooklyn [132]

of locations

25 Freight: Cargo & Commodity Terminals

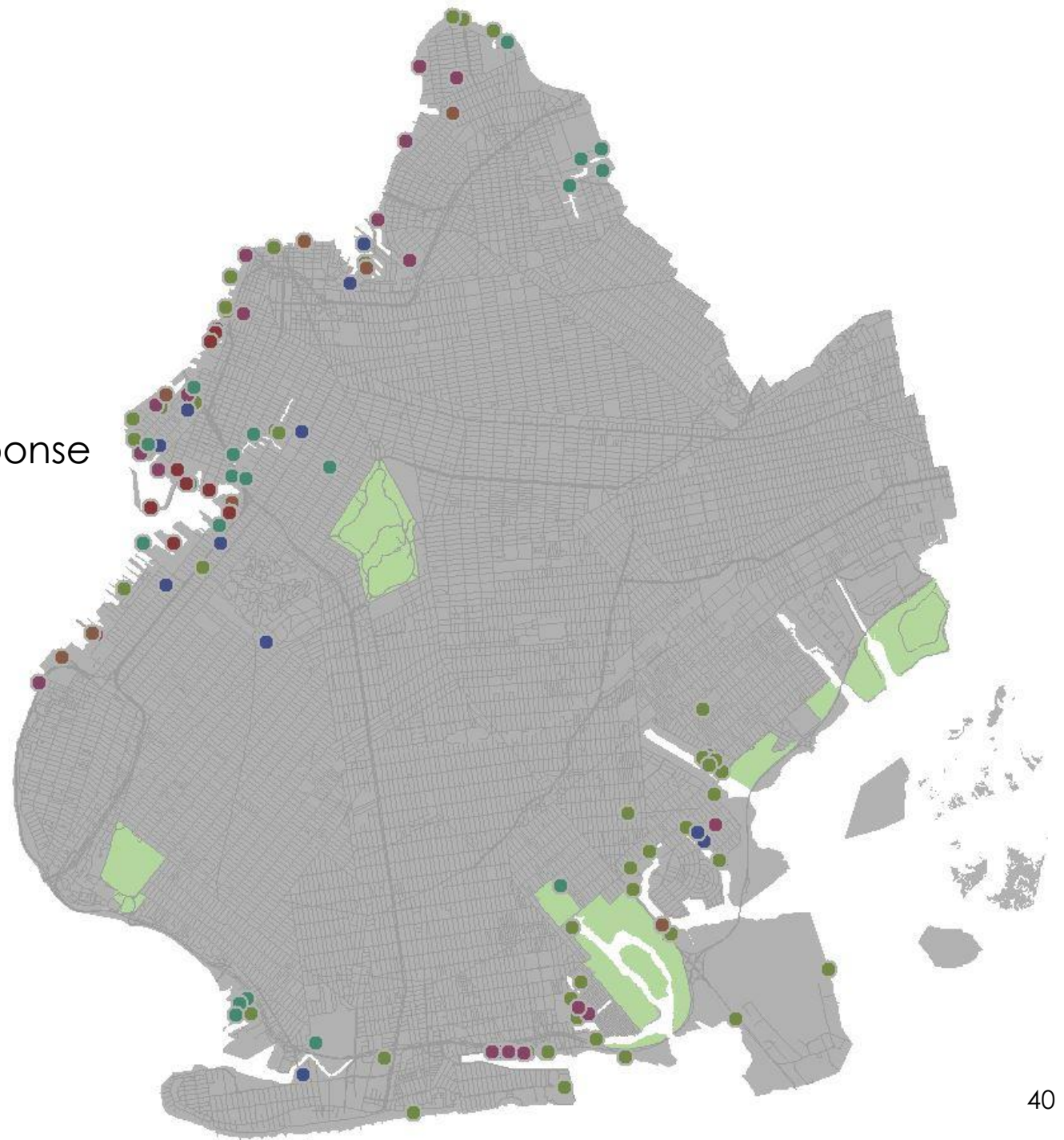
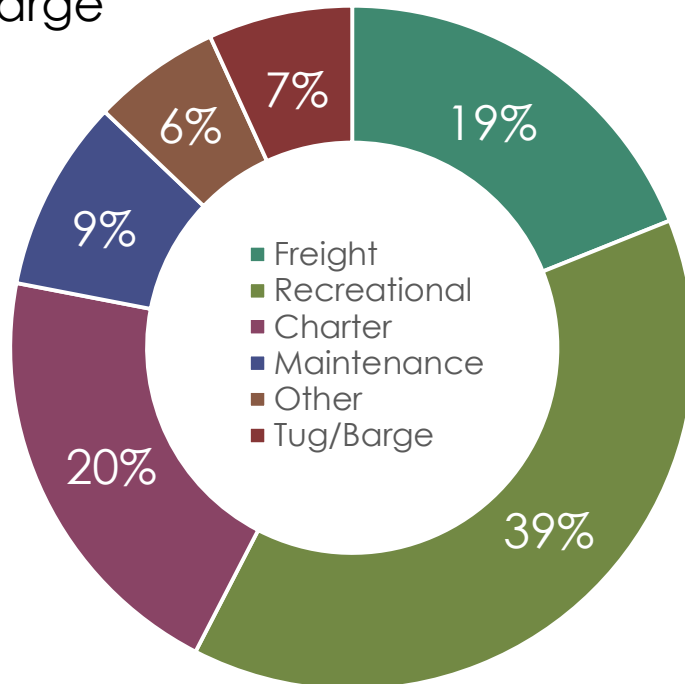
51 Recreational & Educational

27 Ferry, Charter, & Excursion Services

12 Maintenance, Ship Repair, Construction,
Waterfront Inspection & Emergency Response

8 Other Maritime Businesses

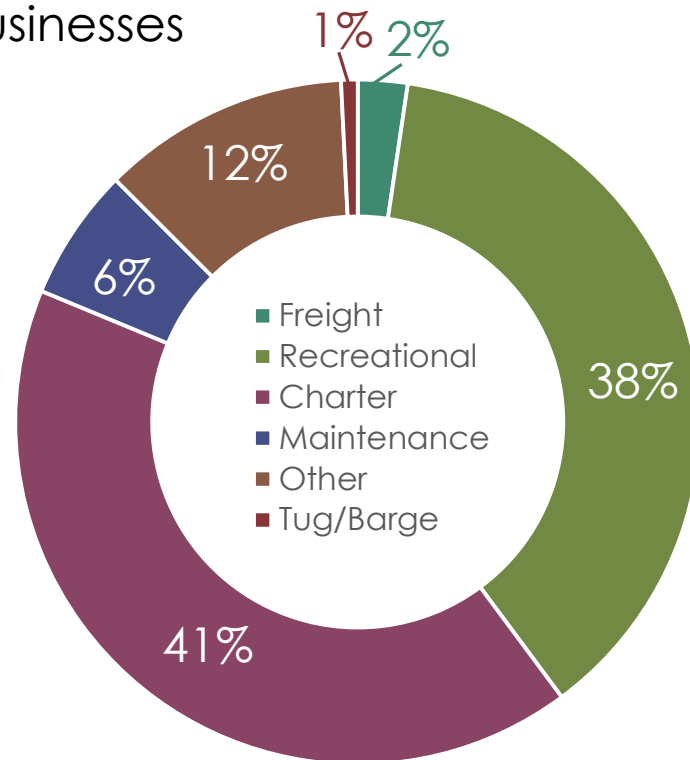
9 Tug & Barge



Manhattan [129]

of locations

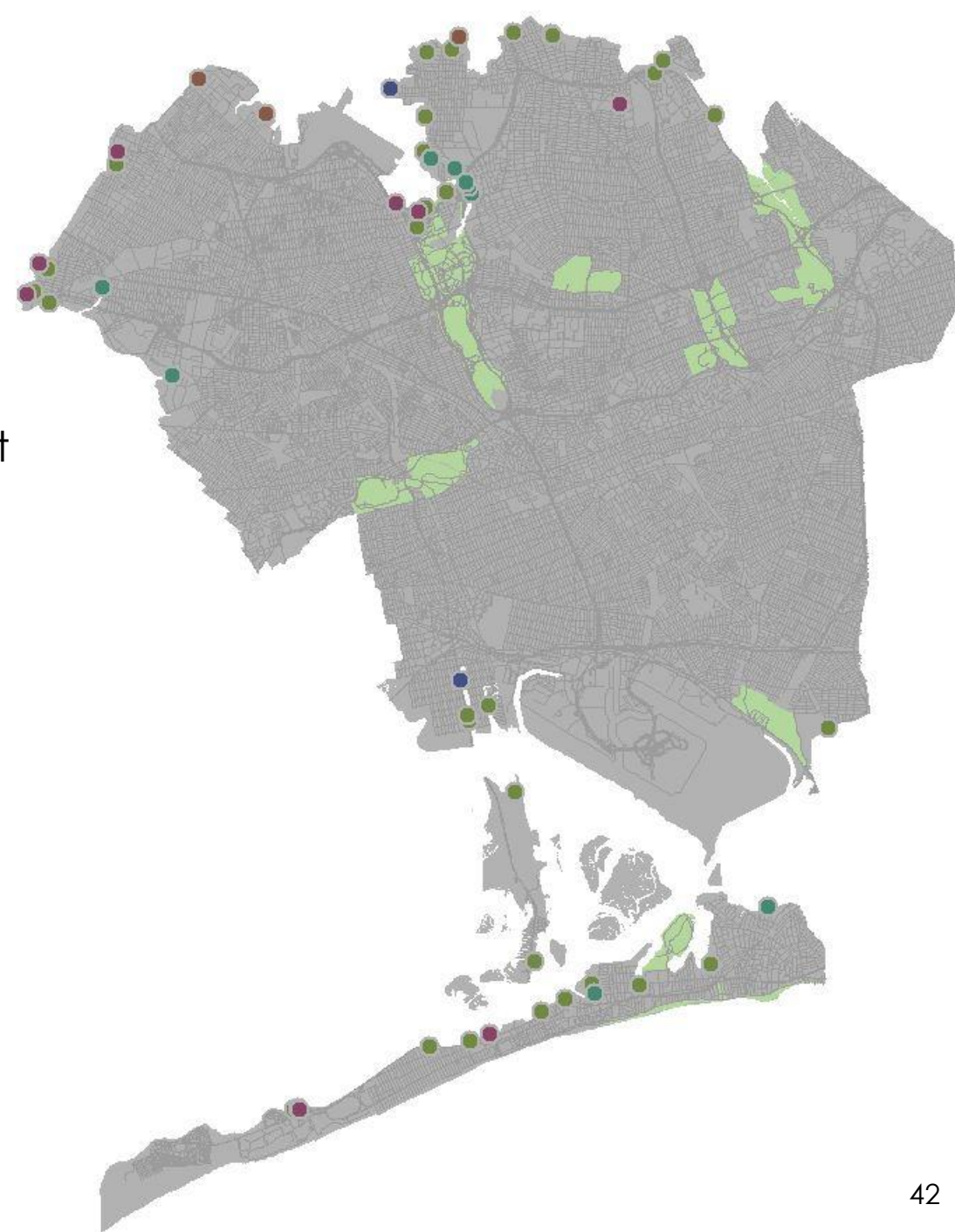
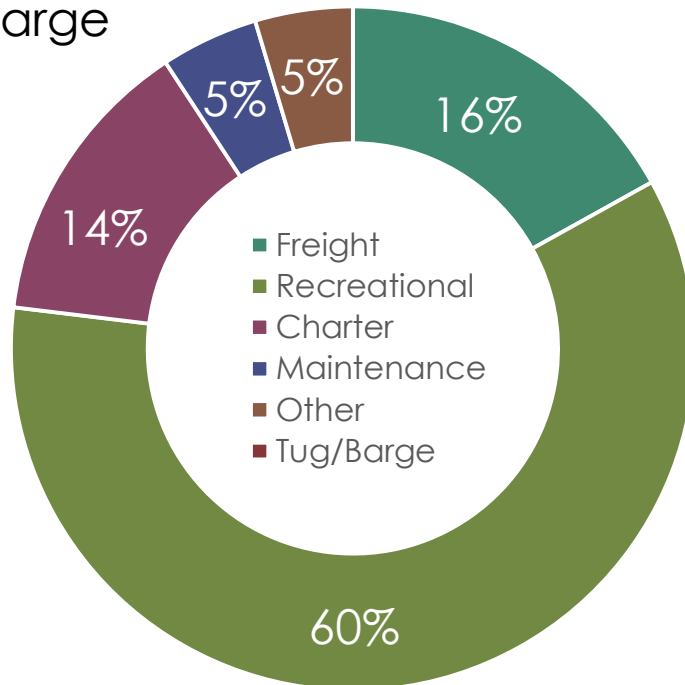
- 3 Freight: Cargo & Commodity Terminals
- 49 Recreational & Educational
- 53 Ferry, Charter, & Excursion Services
- 8 Maintenance, Ship Repair, Construction, Waterfront Inspection & Emergency Response
- 15 Other Maritime Businesses
- 1 Tug & Barge



Queens [65]

of locations

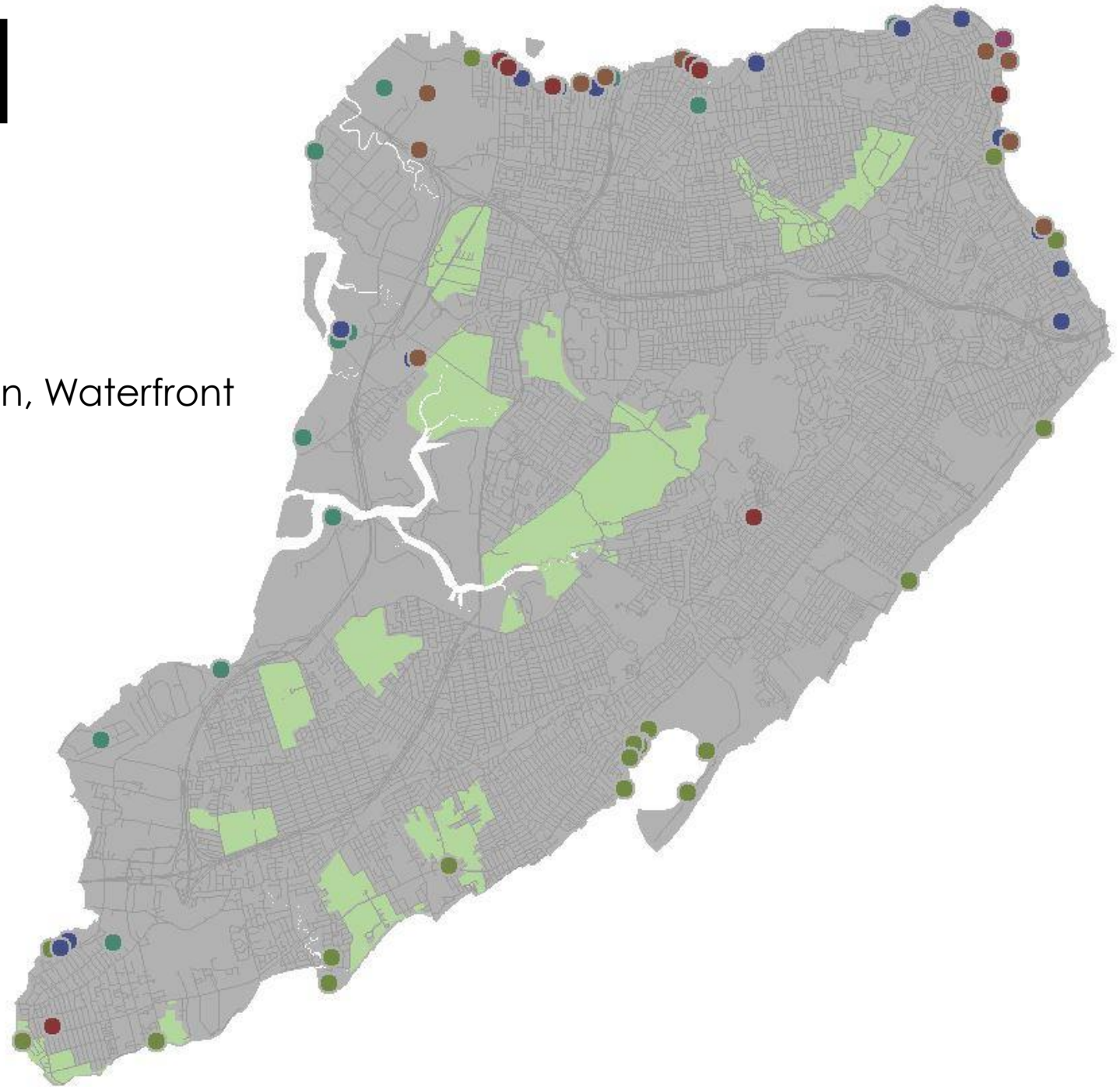
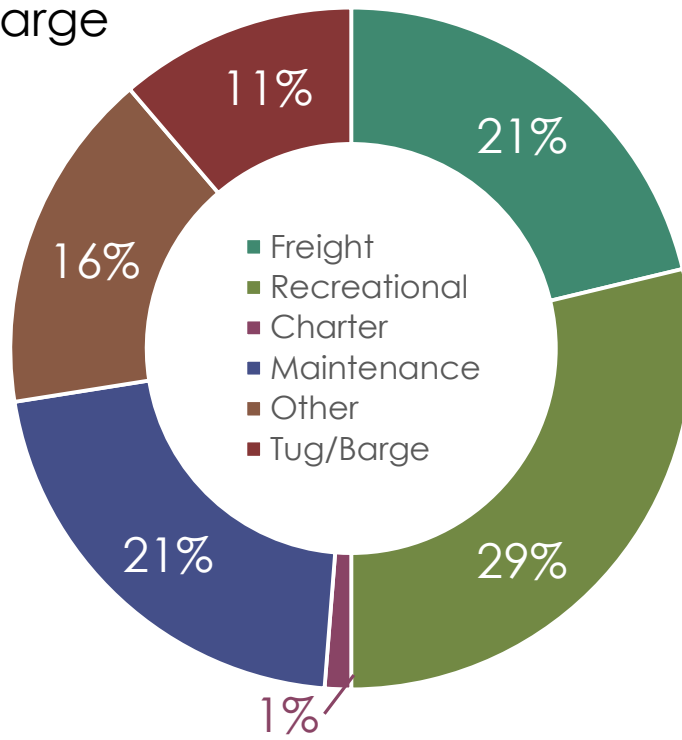
- 11 Freight: Cargo & Commodity Terminals
- 39 Recreational & Educational
- 9 Ferry, Charter, & Excursion Services
- 3 Maintenance, Ship Repair, Construction, Waterfront Inspection & Emergency Response
- 3 Other Maritime Businesses
- 0 Tug & Barge



Staten Island [80]

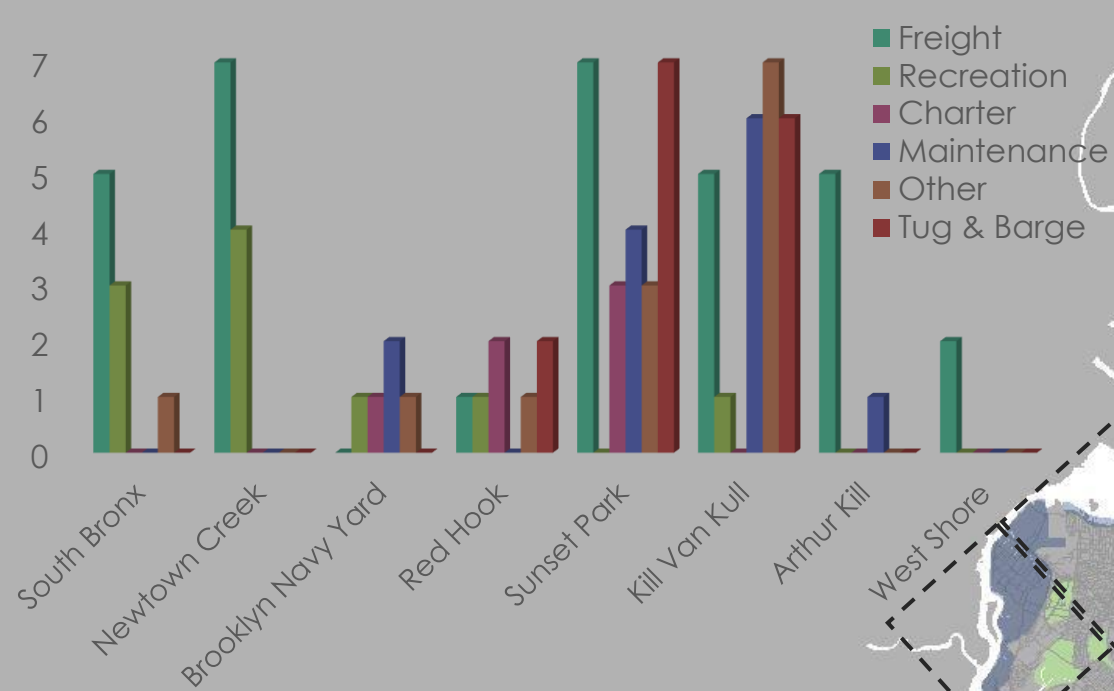
of locations

- 17 Freight: Cargo & Commodity Terminals
- 23 Recreational & Educational
- 1 Ferry, Charter, & Excursion Services
- 17 Maintenance, Ship Repair, Construction, Waterfront Inspection & Emergency Response
- 13 Other Maritime Businesses
- 9 Tug & Barge

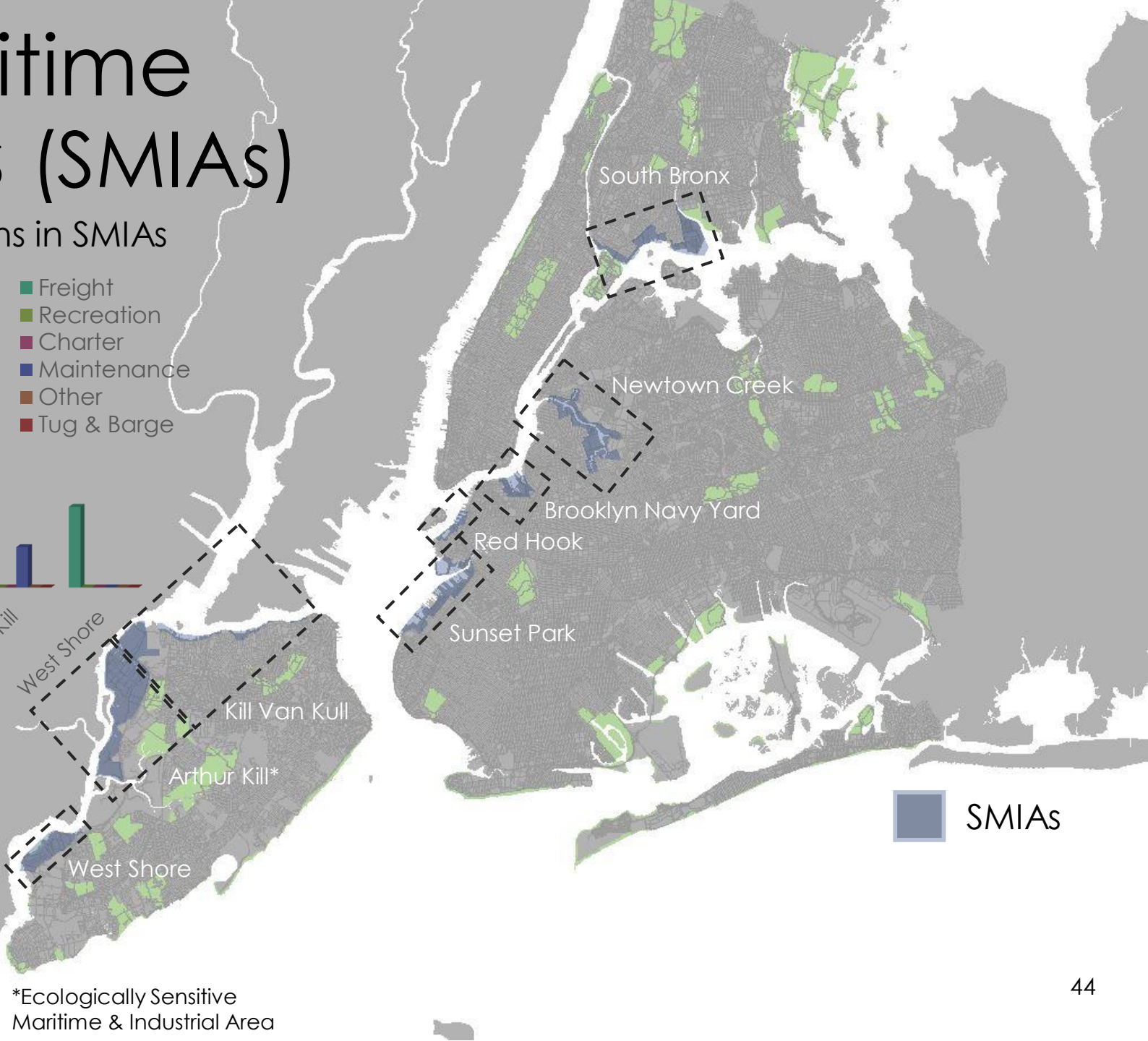


Significant Maritime Industrial Areas (SMIAs)

73 Maritime Freight/Support Locations in SMIAs



43% of NYC maritime support/freight locations are in an SMIAs

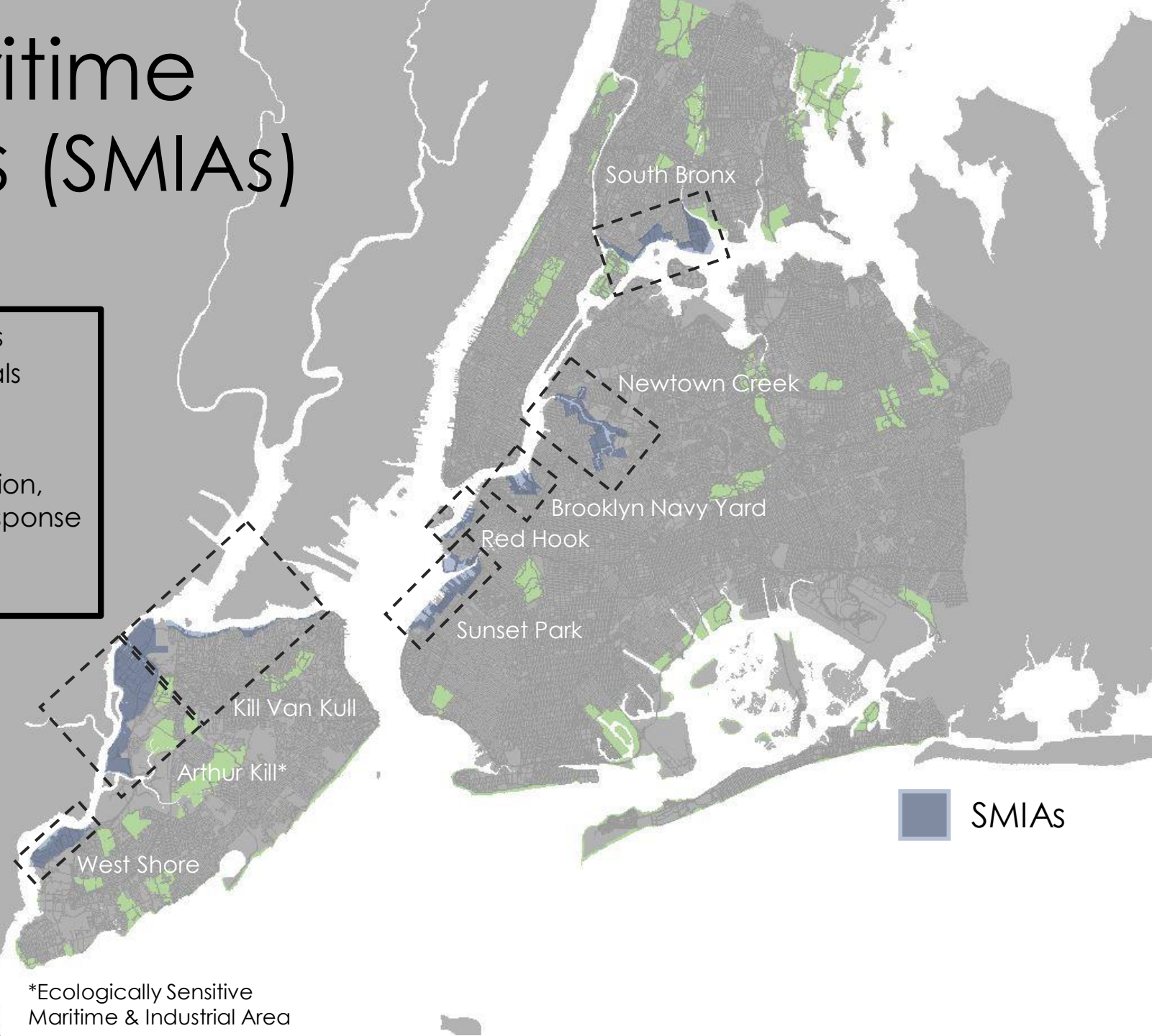


*Ecologically Sensitive Maritime & Industrial Area

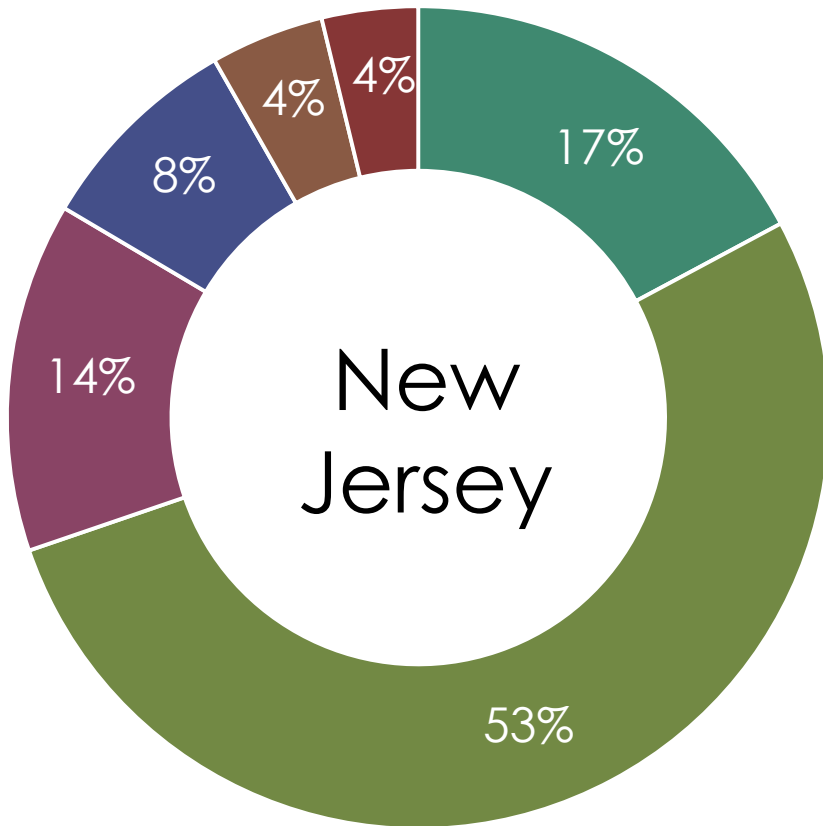
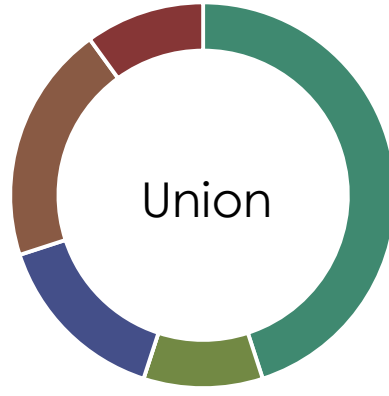
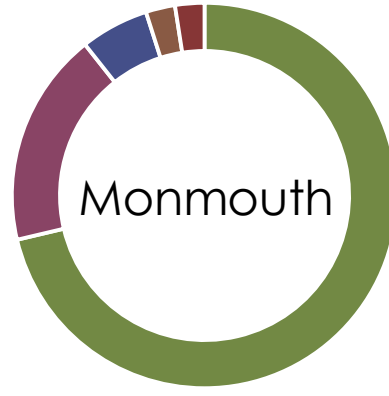
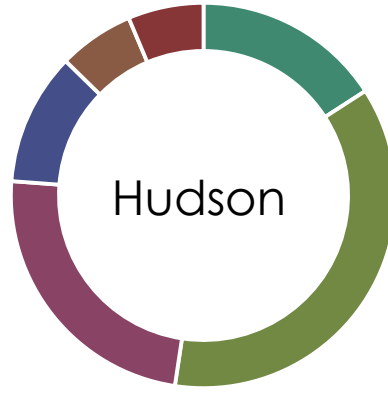
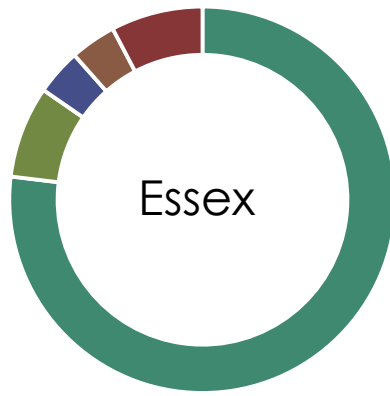
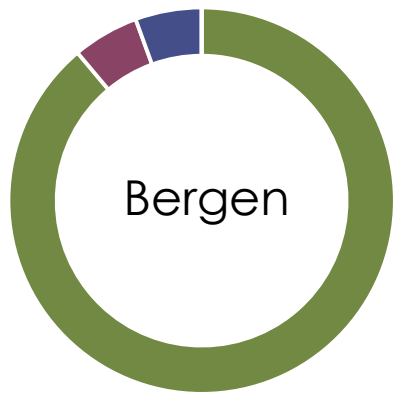
Significant Maritime Industrial Areas (SMIAs)

88 Maritime Businesses in SMIAs

19% of all NY maritime locations are in SMIAs
48% of Freight: Cargo & Commodity Terminals
5% of Recreational & Educational
6% Ferry, Charter, & Excursion Services
30% of Maintenance, Ship Repair, Construction,
Waterfront Inspection & Emergency Response
32% of Other Maritime Businesses
79% of Tug & Barge Operations



*Ecologically Sensitive
Maritime & Industrial Area



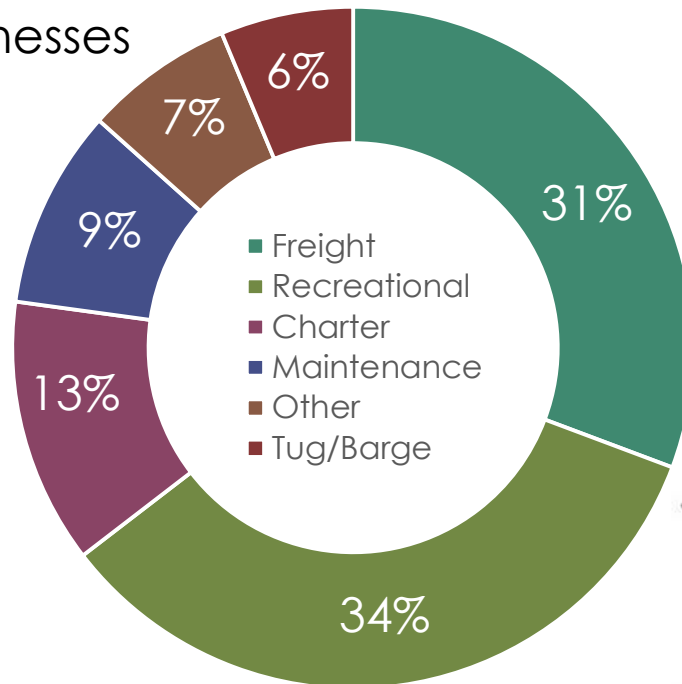
Industry Share [291] by # of locations in harbor locations

- 50** Freight: Cargo & Commodity Terminals
- 153** Recreational & Educational
- 40** Ferry, Charter, & Excursion Services
- 24** Maintenance, Ship Repair, Construction, Waterfront Inspection & Emergency Response
- 13** Other Maritime Businesses
- 11** Tug & Barge

New Jersey [127]

Hudson, Essex, Union, & Bergen Counties # of locations

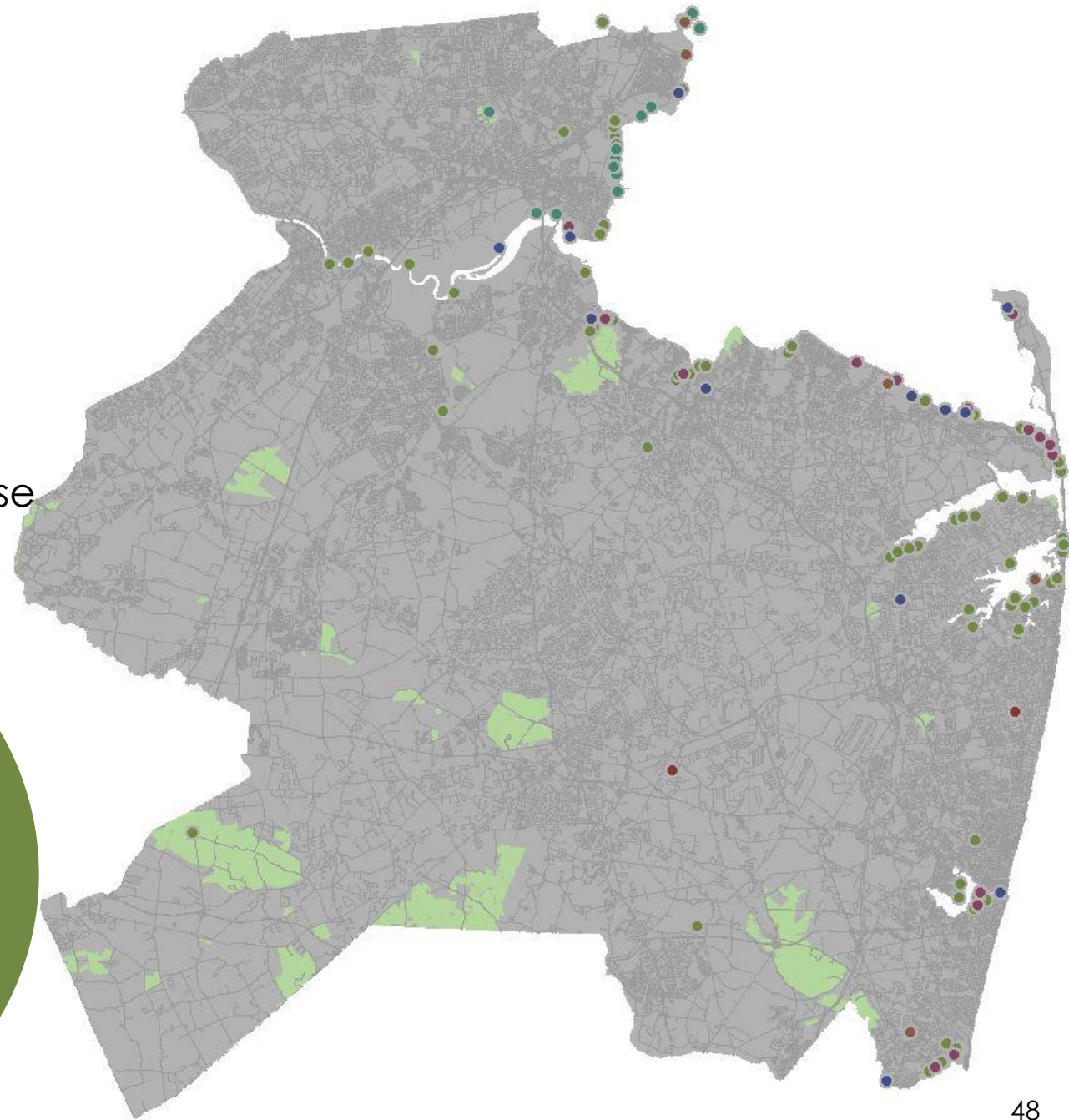
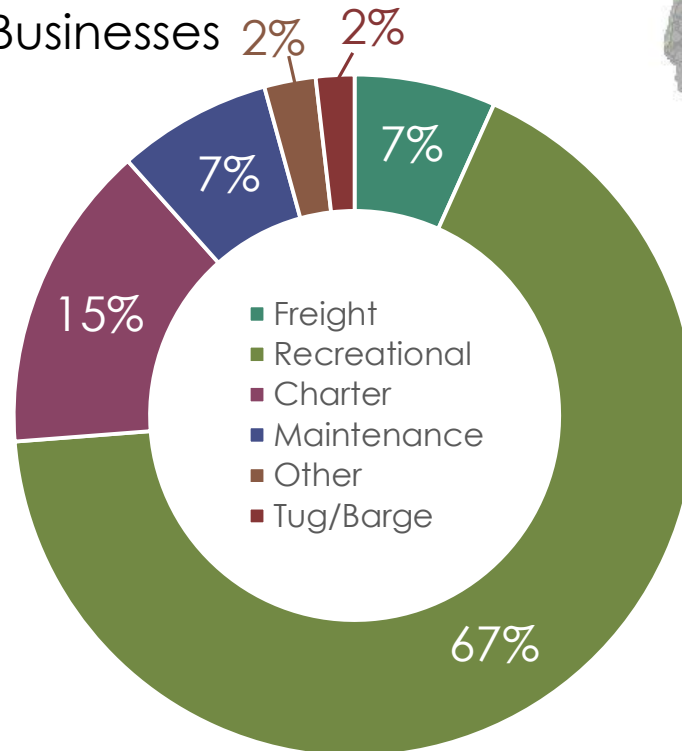
- 39 Freight: Cargo & Commodity Terminals
- 43 Recreational & Educational
- 16 Ferry, Charter, & Excursion Services
- 12 Maintenance, Ship Repair, Construction, Waterfront Inspection & Emergency Response
- 9 Other Maritime Businesses
- 8 Tug & Barge



New Jersey [164]

Middlesex & Monmouth Counties
of locations

- 11 Freight: Cargo & Commodity Terminals
- 110 Recreational & Educational
- 24 Ferry, Charter, & Excursion Services
- 12 Maintenance, Ship Repair, Construction, Waterfront Inspection & Emergency Response
- 4 Other Maritime Businesses
- 3 Tug & Barge



Survey Respondent Quotes

“NYC waterways must be **maintained to minimize heavy truck traffic** on our roads and bridges.”

“I still run into the public’s perception of the water being much **dirtier than it actually is** due to the horrific pollution legacy of the past.”

“...we know that the **latent demand to go kayaking** in NY Harbor is enormous.”

“We are looking for **better access and better maintenance** in order to lessen truck traffic and receive our sand and stone **deliveries by barge**”

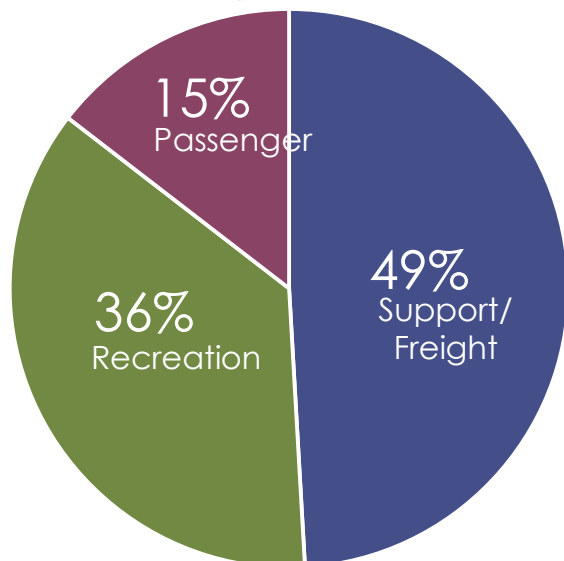
“We would like to expand to new neighborhoods and boroughs but need **more beaches and other access points**”

Appendix i: Methodology/Accuracy

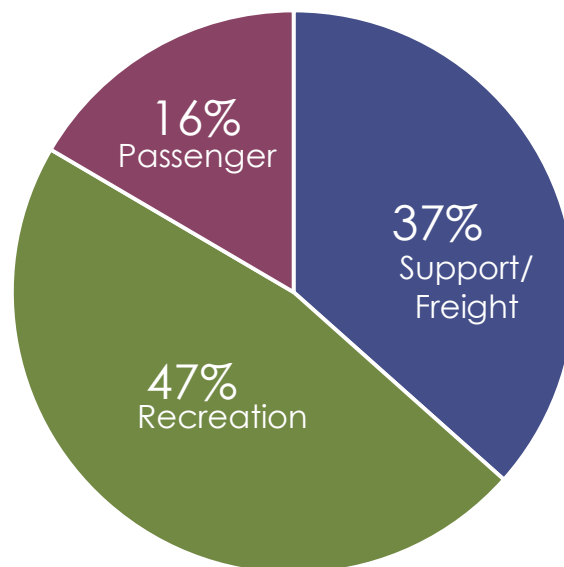


Methodology

of Survey Responses



of known organizations in Harbor



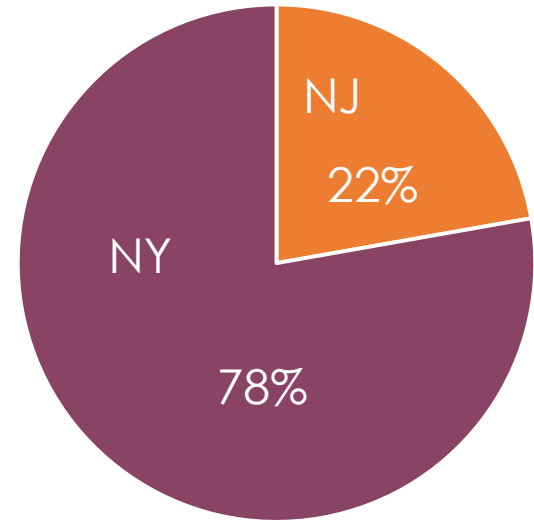
In conjunction with the survey, NYCEDC undertook a mapping effort to inventory all maritime dependent and water's edge organizations in the Port of NY and NJ. Through this effort 574 recreational, passenger, and support/freight organizations were inventoried across New York's five boroughs and in the New Jersey counties of Bergen, Essex, Hudson, Union, Monmouth, and Middlesex. Appendix iii lists the organizations accounted for in the inventory. The inventory was created combining several database sources including InfoUSA and through extensive direct desktop review of aerial maps. This effort was supplemented and crosschecked with inventory data sets and directories collected by NYC Parks & Recreation (DPR), NYC Department of City Planning (DCP), the New Jersey Department of Transportation (NJDOT), the United States Coast Guard, the Towboat and Harbor Carriers Association, and the Port Authority of NY/NJ's Port Directory. The 2019 SHS's comprehensive list of firms is the best estimate of existing maritime firms in the Port of New York & New Jersey to date.

The inventory shows the percentage of passenger organizations who completed the 2019 SHS survey are representative of the passenger subsectors total industry share. However, recreational organizations are somewhat underrepresented in the survey, while support/freight firms are somewhat overrepresented. In noting a reasonable margin of error, NYCEDC finds the firms most likely to be missing from 2019 SHS inventory are support/freight organizations on the New Jersey side of the harbor, largely due to the absence of InfoUSA data for New Jersey being used to compile the inventory.

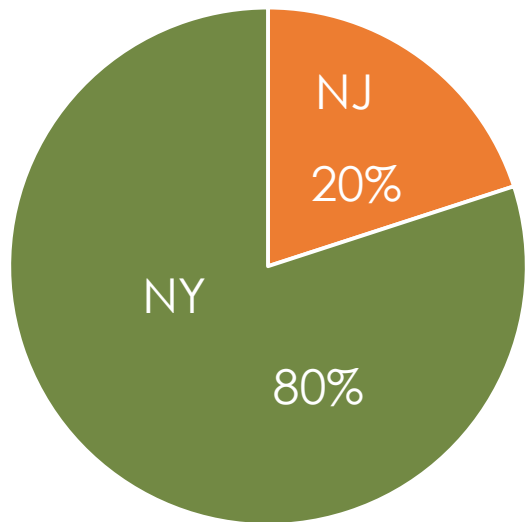
INDUSTRY BREAKDOWN BY LOCATION

Survey vs. Inventory

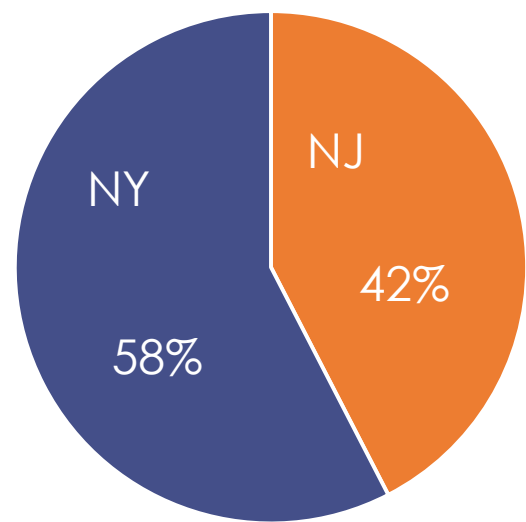
Survey Results



PASSENGER

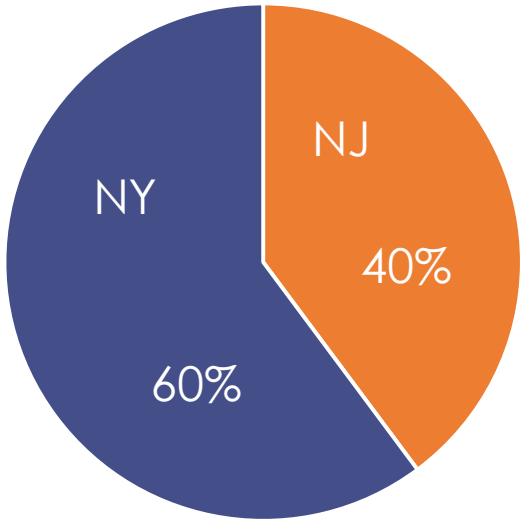
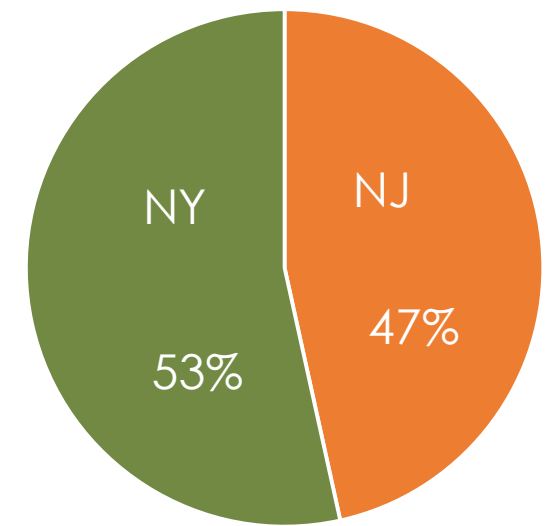
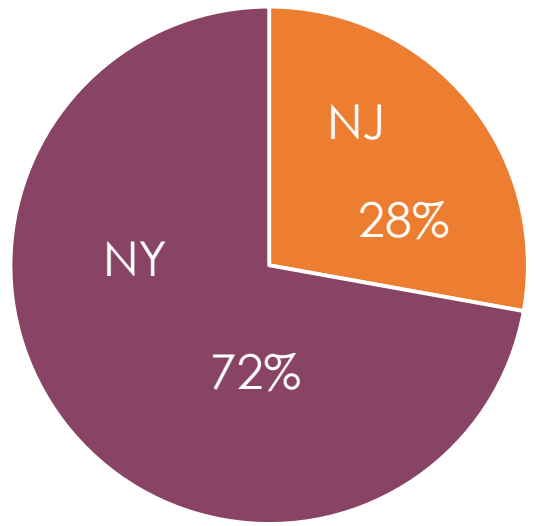


RECREATION



SUPPORT/FREIGHT

Inventory

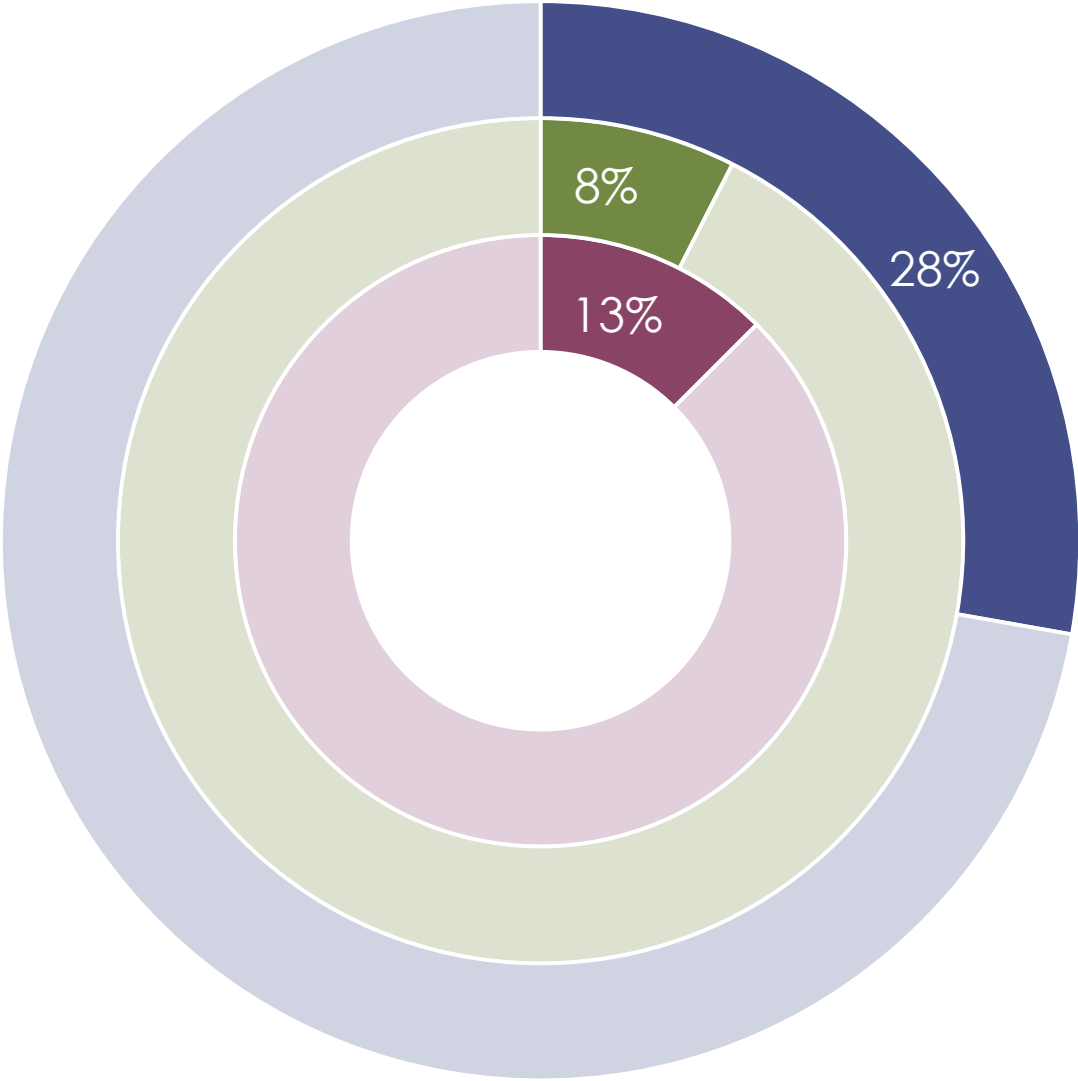
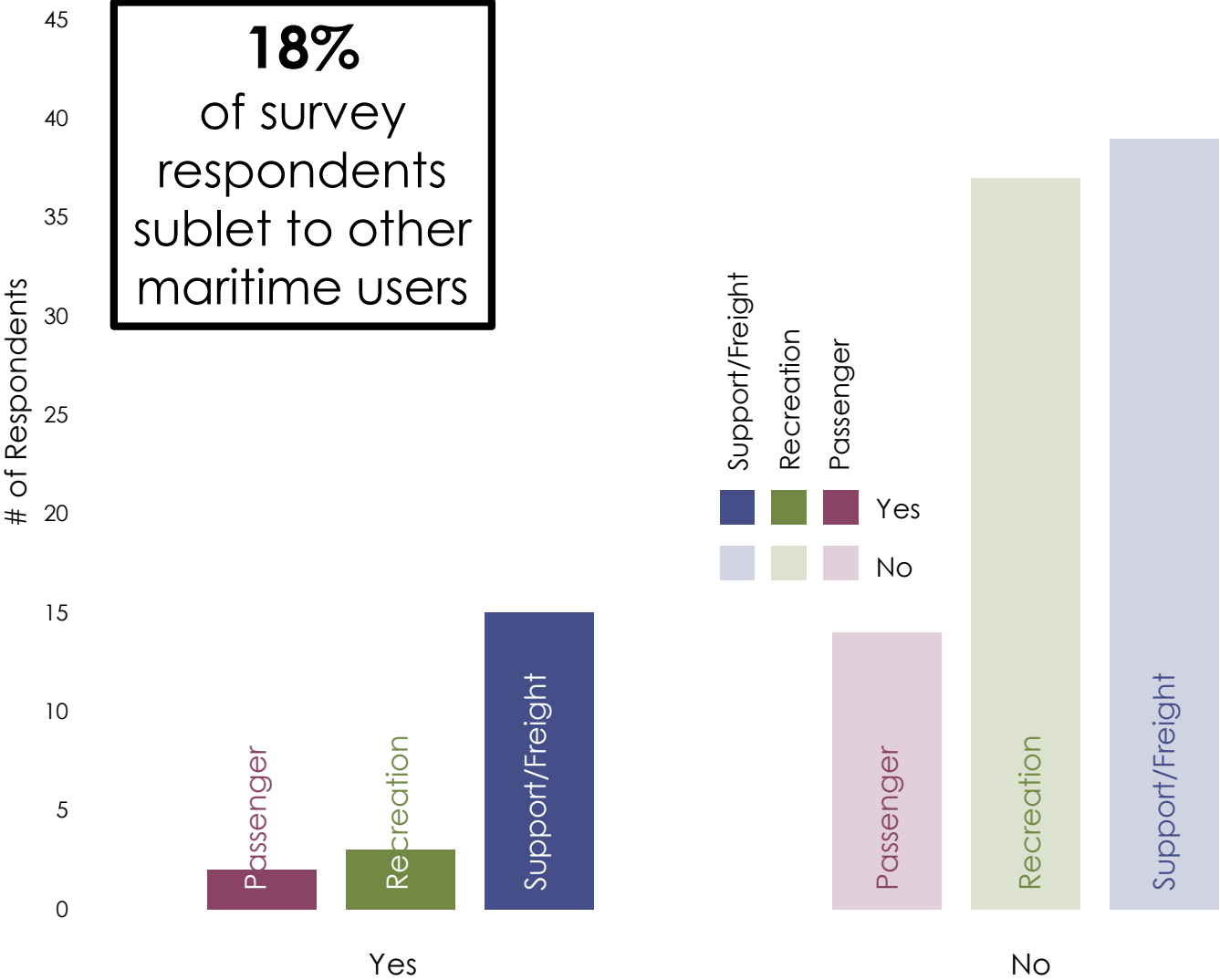


When broken up by location as well as industry type, we see a different picture of survey representation. The survey sample is geographically representative for two of the three subsectors. The share of passenger and support/freight survey respondents from the New York side of the Harbor is roughly proportional to the total number of New York maritime firms and organizations. However, it is clear that survey engagement overrepresented New York-side recreation firms. Only 20 percent of recreation responses are from New Jersey, whereas the inventory shows that 47 percent of recreation firms have holdings in New Jersey. This is likely due to the strong network of recreational boating organizations that exists on the NY side of the harbor.

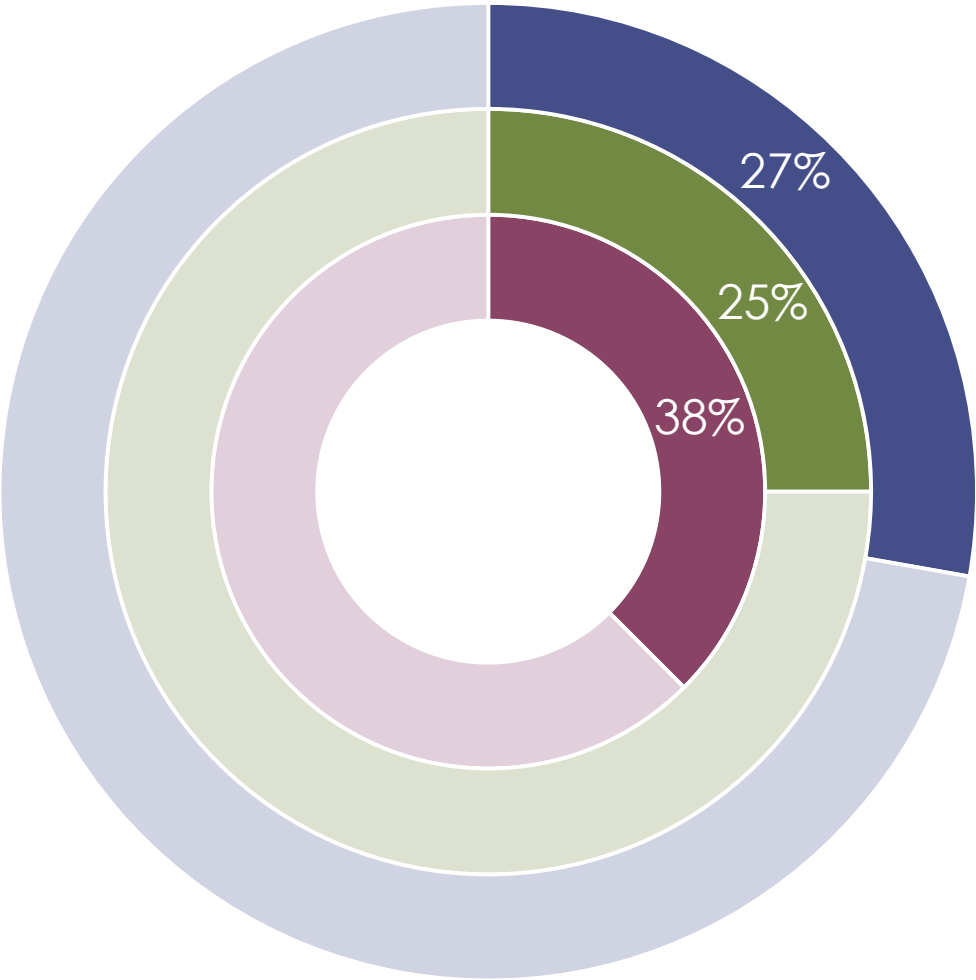
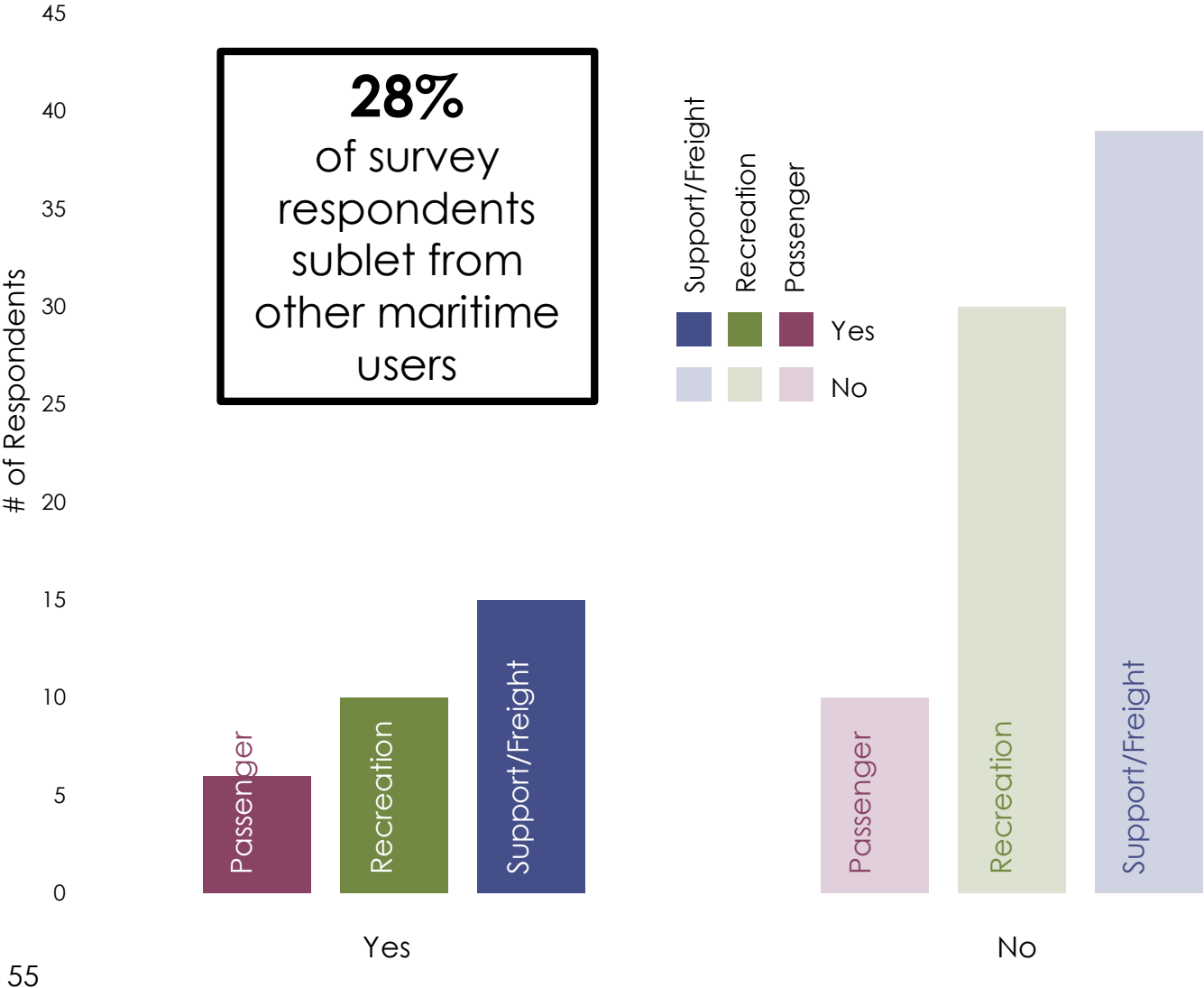
Appendix ii: Additional Findings



Do you sublet to other maritime dependent users?



Do you sublet from other maritime dependent users?



All Respondents



4 in 10
Employees (41%)
spend a majority of their
time on the water*

Passenger



5 in 10 Employees (53%) spend a
majority of their time on the water

Recreation



3 in 10 Employees (29%) spend a
majority of their time on the water

Support/Freight



4 in 10 Employees (42%) spend a
majority of their time on the water

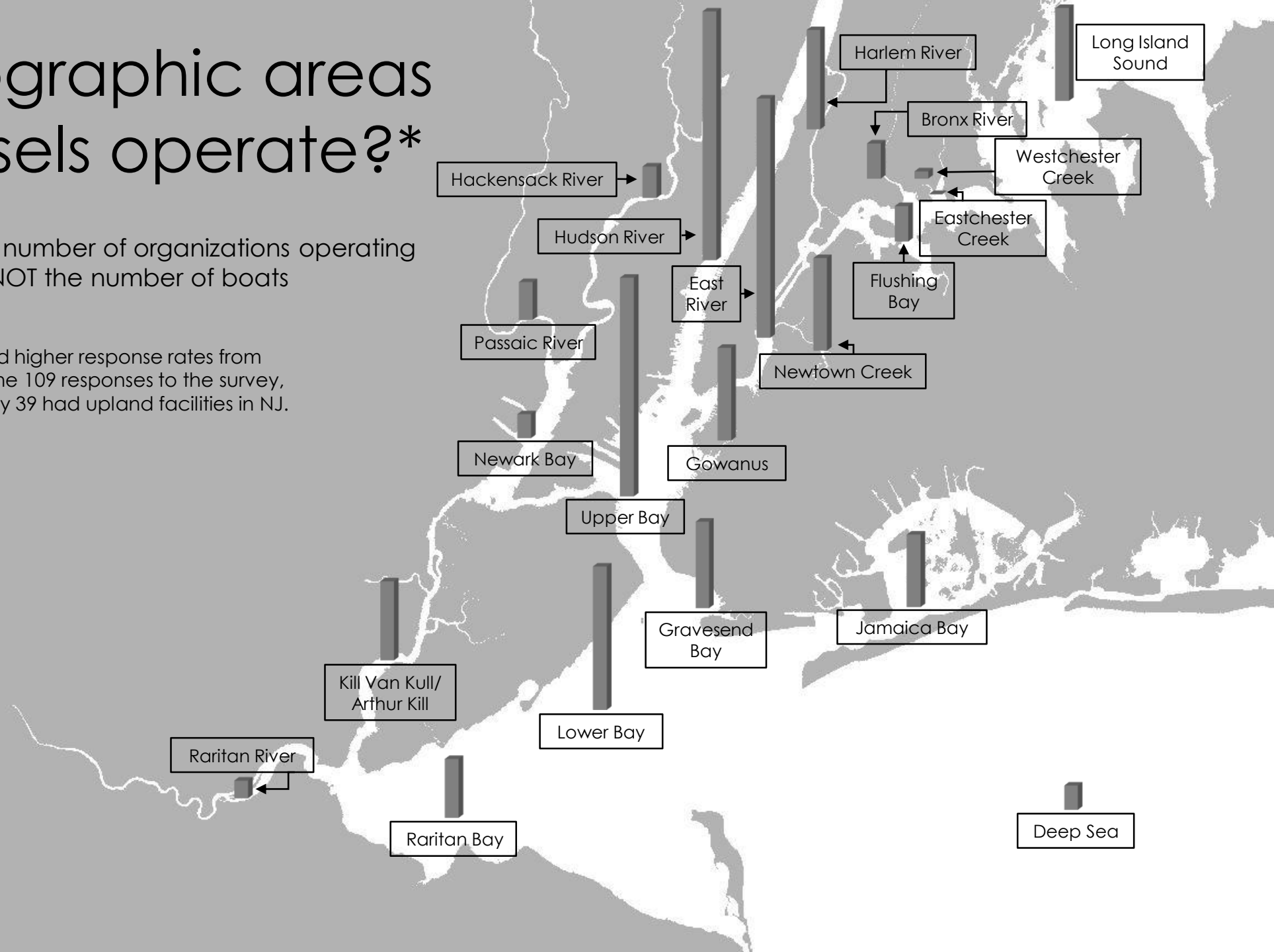
*Percentage of employees who spend a majority of their time on the water normalized by number of employees in each organization

In what geographic areas do your vessels operate?*

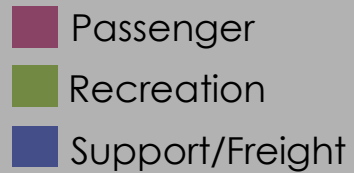
■ All Respondents

*This is a representation of the number of organizations operating boats in different waterways NOT the number of boats

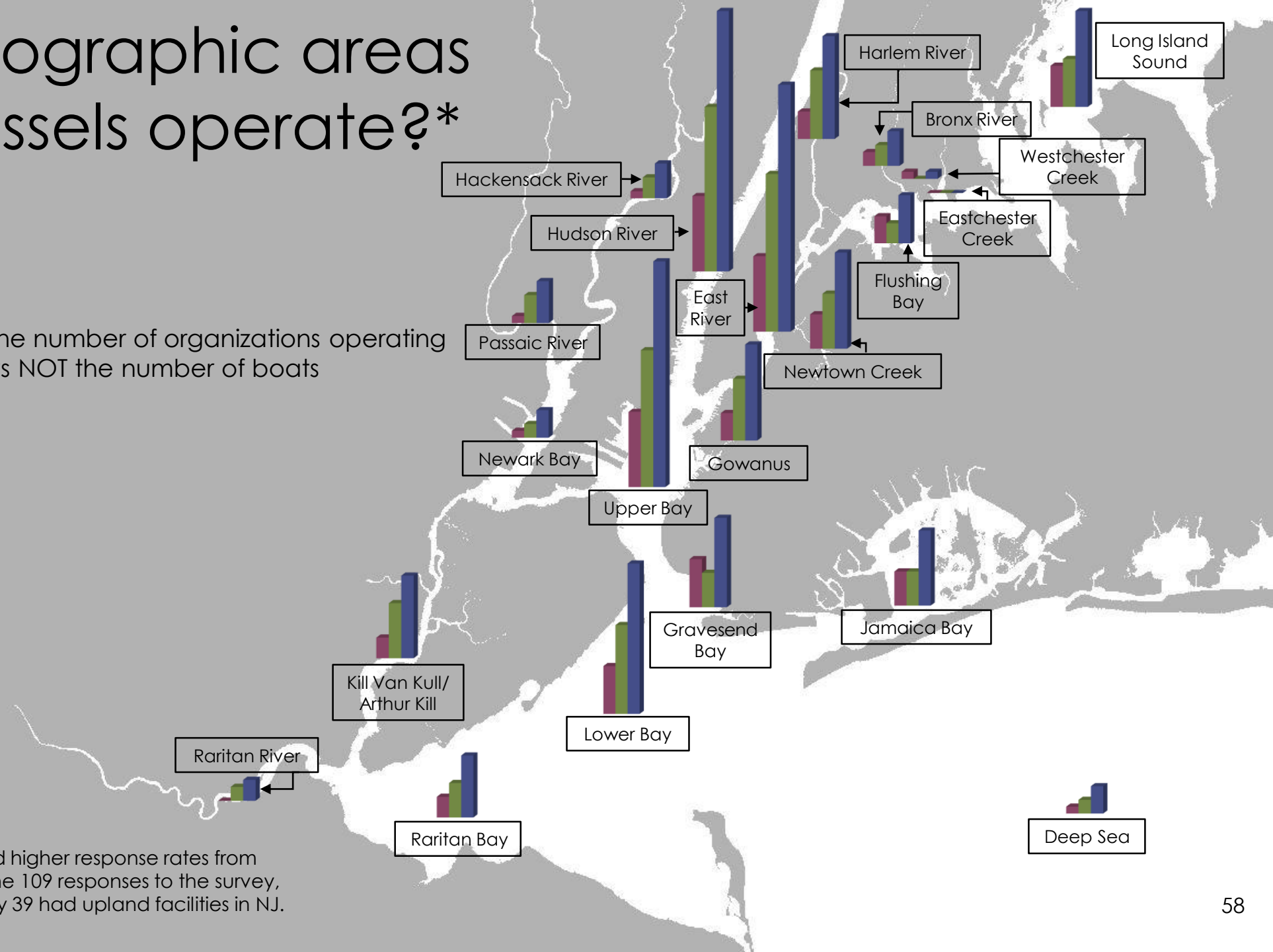
It is important to note that we received higher response rates from New York maritime organizations. Of the 109 responses to the survey, 80 had upland facilities in NY while only 39 had upland facilities in NJ.



In what geographic areas do your vessels operate?*



*This is a representation of the number of organizations operating boats in different waterways NOT the number of boats



It is important to note that we received higher response rates from New York maritime organizations. Of the 109 responses to the survey, 80 had upland facilities in NY while only 39 had upland facilities in NJ.

Are there any physical improvements that would make business better?

(continued from page 30)

RECREATION

- ❖ Human powered slips
- ❖ Bathrooms
- ❖ Showers
- ❖ Lock boxes
- ❖ Changing rooms
- ❖ Picnic tables
- ❖ Boat storage
- ❖ ADA ramps
- ❖ Boat launches
- ❖ Boat ramps
- ❖ Dock space
- ❖ Beach space
- ❖ Fuel dock
- ❖ Repair shop
- ❖ Wake enforcement
- ❖ Piling replacement
- ❖ Wi-Fi
- ❖ Dumpster
- ❖ Flexible pier fencing
- ❖ Equipment to handle larger boats
- ❖ Vehicle access
- ❖ Signage
- ❖ Building space
- ❖ Water quality
- ❖ Sand replenishment
- ❖ Indoor space

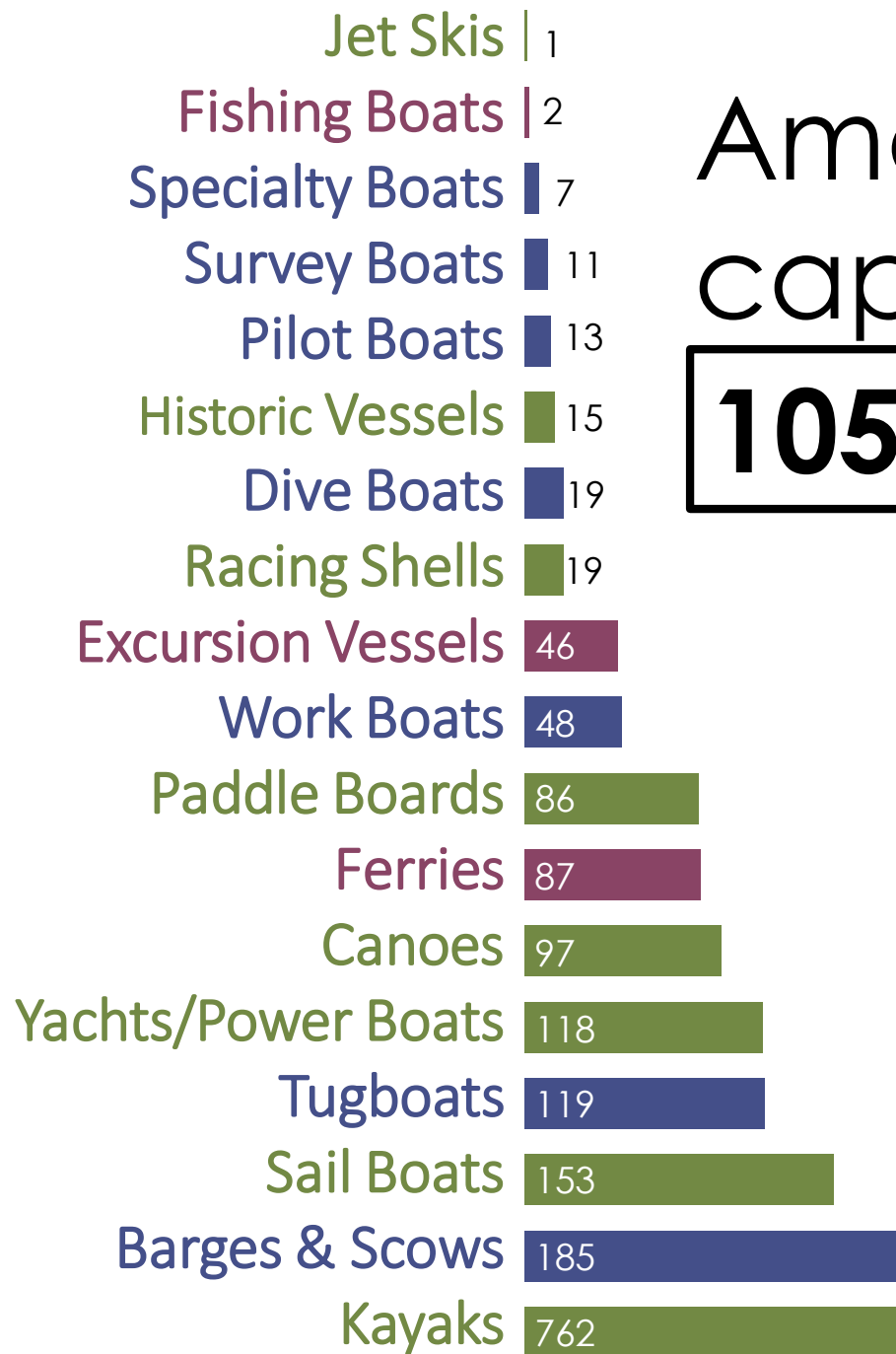
PASSENGER

- ❖ Reasonable priced pick up locations

SUPPORT/FREIGHT

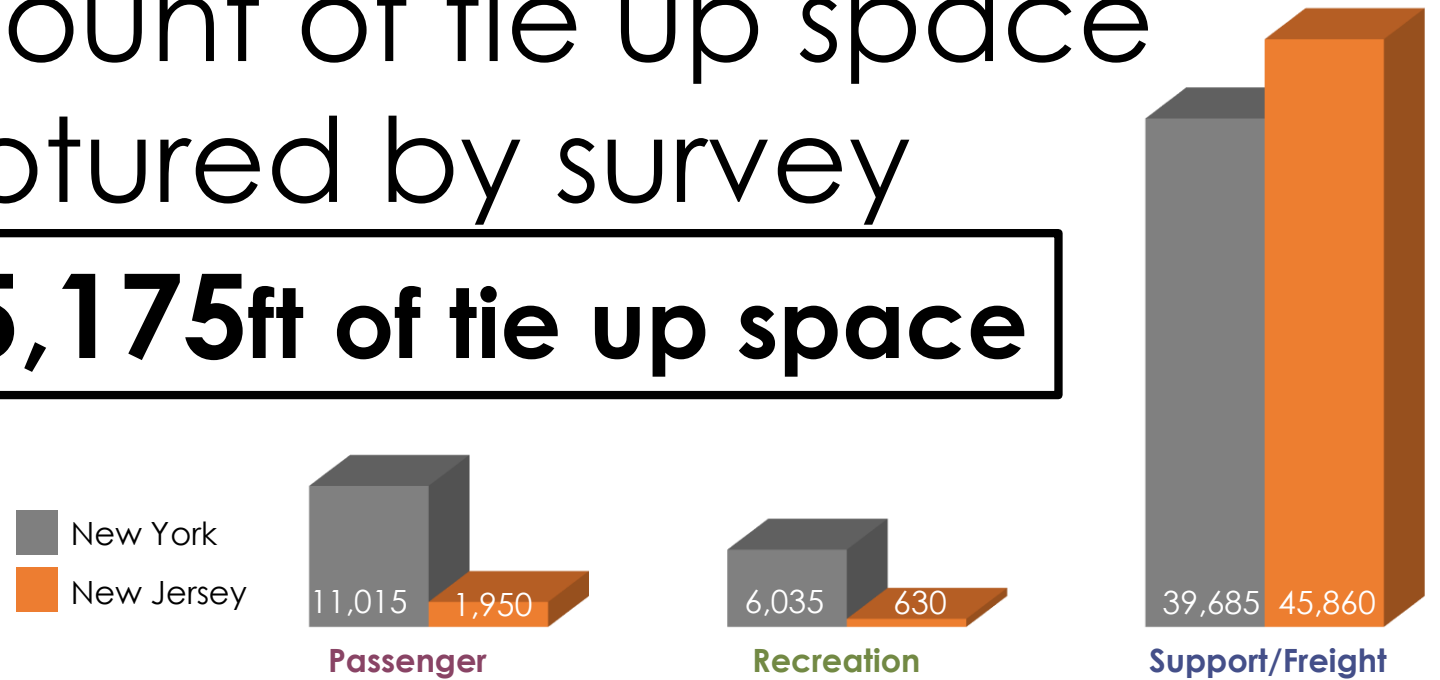
- ❖ Electronic permitting submission
- ❖ Offshore wind support
- ❖ Wake enforcement
- ❖ More surveys
- ❖ Salt storage warehouse
- ❖ Asphalt plant
- ❖ Capital investment
- ❖ Facility consolidation

In addition to bulkhead, dredging, slips, warehouse/storage, office space, parking, and upland road access, survey respondents had the opportunity to write in any physical improvements that were not provided to them as an option. Respondents could choose as many options as they saw fit as well as write in additional needed improvements. The list above is a summary of the write-in answers received for this question.



Amount of tie up space captured by survey

105,175ft of tie up space

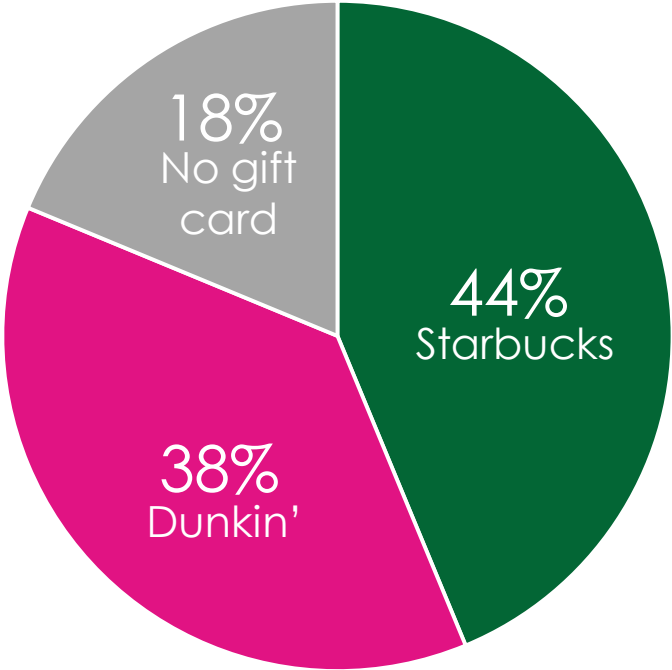


Number of Boats captured by Survey

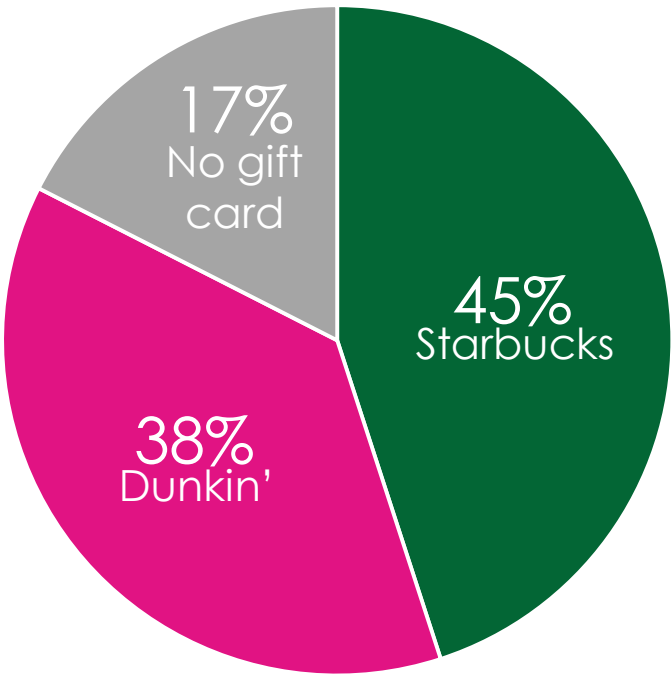
1,788 Boats

Gift Card to Starbucks or Dunkin' Donuts?

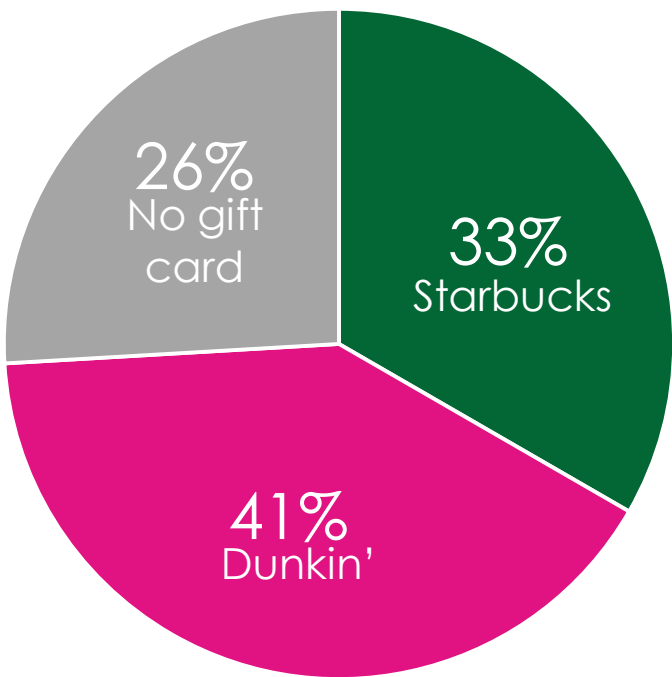
PASSENGER



RECREATION



SUPPORT/FREIGHT



TOTAL

| | |
|--------------|----|
| DUNKIN' | 43 |
| STARBUCKS | 43 |
| NO GIFT CARD | 24 |

Appendix iii: Inventory of Organizations [574]

A

Alpine Boat Basin
Acquarian Charters
Adirondack Sailing
Adventure Sightseeing Tours
All NYC Yachts
All Seasons Marine
Allocco Recycling
AM Marina
Amberjack Cruises
American Princess Cruises
American Ship Repair
Amertech Industries
Ampere Fishing & Yacht Club
AmpRod Corporation
Angler's Marina
APM Terminals
Arrow Yacht Club
A-Team Paddle Boarding
Atlantic Highlands Municipal Harbor
Atlantic Highlands Yacht Club
Atlantic Marina
Atlantic Salt Corporation
Atlantic Yachting
Atlantica Yacht Charters
Atlantis Marina Boat Sales
Atlantis Yacht Club
Atlas Yacht Club

B

Bahr's Landing Marina
Baker's Marina on the Bay Yacht Club

Barnacle Bill's Marina
Barron's Marine
Bay Beach Marina
Bay End Marina
Bayonne Dry Dock & Ship Repair
Bayonne Energy Center
Bayshore Recycling Corporation
Bayside Fuel Oil Depot
Bayside Marina
Bayway Phillip 66
Belle Harbor Yacht Club
Belmar Marina
Benson Scrap Metal
Best Concrete Mix
Best Transportation
Big Kid Charters
Bill Chaser Charters
Billion Oyster Project
Boat and Yacht Report
Boatmax II
Boatride NYC
Bogan's Brielle Basin
Bogan's Deep Sea Fishing Center
Bolton & Myers Marina
Boro Park Cutting Tools
Boston Marine
Bouchard Transportation
BP Marine Americas
Brady Marine Repair Co
Bridge Construction Services
Brielle Anchorage Marina
Brielle Yacht Club & Marina

Bronx River Alliance
Bronxonia Yacht Club & Marina
Brooklyn Bridge Park Boathouse
Brooklyn Cruise Terminal
Brooklyn Kayak Guides
Brooklyn Navy Yard Development Corp.
Brooklyn VI Fishing Boat
Brooklyn Yacht Club
Brook's Marina
Brown's Boat Yard
Brown's Point Mairna
Brown's Point Marine Service
Buckeye Terminals

C

Caddell Dry Dock & Repair Co
Caldwell Marine
Caliber Yacht Charters
Calypso Cruises
Calypso Sailing Adventures
Cape Liberty Cruise Port
Capitol Princess
Captain Hook's Marina
Captain Dave Fishing
Captain Dave III Party Boat Fishing
Captain Ron's Fisherman
Captains & Mates Yacht Club
Captain's Cove Marina
Carriage House Marina
Casa Redimix Concrete
Castle Port Morris Terminals
Catch 22 Dragon Boat Racing
Ceres Atlantic Terminals

Channel Club Marina
Charles J King Inc
Charter Sails
Chelsea Piers Maritime Center
Chelsea Sailing School
Chevron Asphalt Plant
Chevron Oil Refinery
Chris' River Plaza Marina
CI Consultants
CIBBOWS
Circle Line
CITGO Petroleum Terminal
City Island Lobster House
City Island Marina
City Island Yacht Club
City Island Yachts & Marina
City Sightseeing New York
Classic Harbor Line
Clean Earth Dredging Technologies
Clean Harbor Co-Op
Clean Water of New York
Cliffside Marina
Cloud 9 Marine Enterprises
CMC Rebar
Coastline Marine Tug & Barge
College Point Yacht Club
Con Edison
Consolidated Yachts
Construction & Marine Equipment
Cornucopia Cruise Lines
Corvetts Auto & Boat Fiber

Covesail
Cummins Sales & Service

D

Dapro Solutions
DCH Racing Dragon Boat Club
Deep Creek Cove
Deep Water Landing Marina
Del Rio Yachts
Dep. of Environmental Protection
Department of Parks & Recreation
Department of Sanitation
Department of Transportation
Di Meglio Marina
Diamond Point Yacht Club
DiMeglio Dan Marinas
Drury Marine Corporation
DOC Hart Island Ferry
Dock NYC
Domino Sugar
Don Jon Marine
Don Jon Recycling
Dorothy B. Fishing Party Boat
Down Deep Sportfishing
Downtown Boathouse
Duraport Marine & Rail Terminal

E

East River Crew
Eastern Metal Recycling Terminal
Eastern Star Cruises
Eastern Warehouse

Ebb Tide Marina
Edgewater Marina
EIC Associates
Elco Marina Inc
Elizabeth Marina
Elizabeth Marine Terminal
Empire City Watersports
Empire Cruises
Empire Dragon Boat
Empire Dragons NYC
Empire Metal Trading LLC
Empire Transit Mix Inc
Englewood Boat Basin
Entertainment Cruises
Erie Basin Marine Associates
Essex Cement Company
Evers Marina
Executive Yacht Club

F

Fair Haven Yacht Works
FAPS Inc
FDNY Marine Division
Fenton Marine
Ferrara Bros Ready Mix
Flag Container Services
Flamingo III Wiegand Marine
Flushing Asphalt
Fort Monmouth Marina
Frank A. Vincent Marina
Freedom Cruises
Front Street Transfer Station
Futura Yacht & Ship Building

G

Gapro Marine Services

Gateway Bike & Boathouse
Gateway Marina
GCT Bayonne
GCT New York
Gellatly & Criscone Services
Genesis Marine
Global Chassis Depot
GMD Shipyard
Gordon Terminal Service
Company
Gotham Aggregates
Gowanus Bay Terminal
Gowanus Dredgers Canoe Club
Grand Cove Marina
Great American Lines
Great Kills Yacht Club
Great Lakes Dredge & Dock

H

Hackensack Riverkeeper
Hackensack Yacht Club
Hamilton Asphalt
Hamilton Ave Marine Transfer Station
Hammond Cove Marina
Hans Pedersen & Sons
Harbor Ferry Services
Harbor Lab
Harlem River Community Rowing
Harlem Yacht Club
Harley Marine
Hennessy Yacht Charters
Henry Marine Service
Highbridge Stone
Hoffman's Marina East
Hoffman's Marina West
Hornbeck Offshore Operators

Hornblower Cruises
Howard Beach Motor Club
HRC Marine
Hudson Point Marina
Hudson River Community Sailing
Hudson River Pilots Association
Hudson River Yacht Club
Hughes Brothers

I

Ikea Ferry
Imagine Yacht Charters
International Longshoreman's
Association
Inwood Canoe Club
Inwood Material Terminal
Irwin marine
Island Current Fleet

J

JK Petroleum
Jacque Pierot Jr & Sons
Jan & Jerry's Marina
JDL Precision CNC Machine
Jenny Lee Sportsfishing
JT Cleary Inc

K

Kaufman Marina
Kayak & Canoe Club of NY
Kayak Staten Island
Kelly's Landing Marina
Ken's Marine Service
Keyport Marine Basin
Keyport Yacht Club

Kinder Morgan
Kings Plaza Marina
Kingsborough Community College
Kirby Offshore Marine
Kirby Street Marina
Kuehne Chemical

L

LA Marina
Laboratory Service
Lafarge Holcim
Langan International
Lentze Marina
Leonardo State Marina
Lexington Classic Cruises
Liberty Harbor Marina
Liberty Island Ferry
Liberty Landing Ferry
Liberty Landing Marina
Lil Cricket Too Marina
Lilac Preservation Project
Lincoln Harbor Yacht Club
Lockwood Boat Works
Locust Point Yacht Club
Long Branch Ice Boat & Yacht Club
Long Island City Community Boathouse
Long Shot Charter
Lubeck's Landing

M

M&B Marine
Maher Terminal
Mammoet USA North
Manasquan River Yacht Club

Manhattan By Sail
Manhattan Community Boathouse
Manhattan Cruise Terminal
Manhattan Kayak & SUP
Manhattan Sailing School
Manhattan Yacht Club
Manning Electric Inc
Manning Supply Co
Mansion Marina
Marco Polo Cruises
Marilyn Jean Charters
Marin & Ottaway
Marina 59
Marina Bay Club
Marina Lansky
Marina Moscone
Marine Basin Marina
Marine Oil Service of New York
Marine Park Alliance
Marine Spares International
Marine Trades Association of NJ
Mariner III Charters
Mariners Harbor Cargo Terminal
Mariners Harbor Yacht Club
Maritime Association
Matrix Global Logistics Center
May Ship Repair
McAllister Towing
McCarthy Marine Sales
McInnis Cement
Mermaids Cove Marina
Metro Associates Sea Kayakers
Metro Athletic Dragons
Metro Marine Inc
Metro Marine Corporation

Metro Yacht Charter NYC
Metropolitan Marine
Transportation
Mid Ocean Wind
Midget Squadron Yacht Club
Miller's Launch
Minneford Marina
Miramar Yacht Club
Misty Morn Fishing Boat
Mola Sheet Metal & Supplies
Molly Pitcher Inn Marina
Monmouth Boat Club
Monmouth Cove Marina
Monmouth Sailing Center
Monte's Marine Service
Moonbeam Gateway Marina
Moran Towing
Morgan Marina
Morris Yacht Beach Club
Motiva Seawaren Dock
Muller Boatworks

N

National Cargo Bureau
National Marine Manufacturers
National Oceanic & Atmospheric
Association
Naval Weapon Station Earle
Waterfront Complex
Navesink Marina
Neptune Machine Works
Neptune Marina
Nereid Boat Club
Never Enuff Fishing
New Jersey Sailing Center

New Jersey State Police
New York Cruise Lines
New York Cruises The Atlantic
New York Harbor Fishing
New York Harbor School
New York Kayak Company
New York Kayak Polo
New York Outrigger
New York Sailing Center
New York Sand and Stone
New York Shipping Association
New York Terminals
New York Wall Street Dragons
New York Waterway
New York Water Taxi
New York Yacht Club
Newport Yacht Club & Marina
Nichols Great Kills Marina
North Brooklyn Boat Club
North Channel Yacht Club
North Hudson Yacht Club
North Minneford Yacht Club
North Shore Marine Transfer Station
North Shrewsbury River Ice Boat &
Yacht Club
NYC Ferry
Nycon Supply Corporation
NYPD Harbor Unit

O

Ocean Eagle V
Ocean View Marina
Ocean Yacht Club
Oceanic Marina
Oceanport Landing

Ocean 150 Marina
Old Mill Yacht Club
On Time Ready Mix
One 15 Brooklyn Marina
One 15 Brooklyn Sail Club
One Edison Avenue Corp
Osprey Maritime
Overpeck Park Kayak & Canoe Center

P

Paerdegat Yacht Club
Panalpina Carteret
Parker Petes Sportfishing
Pascap Export Inc
Passaic River Rowing Association
Patten Point Yacht Club
Peckham Asphalt
Penn Maritime
Perth Amboy Municipal Marina
Peter J Sharp Boathouse
Pirate's Cove Marina
Plan B Marine
Pleasure Bay Yacht Basin
Point Comfort Marina
Poling and Cutler Marine
Transportation
Port Atlantic Yacht Club
Port Authority of NY & NJ
Port Imperial Marina
Port Newark Container Terminal
Port Regalle Yacht Club
Ports America
Portside

Pratt Industries Paper
Praxair Mid Atlantic
Prestige Yacht Charters
Prime Fishing Charters
Princess Bay Boatmen's Association
Private Sail Boat Charter
PSE&G Hudson Power Station

Q

Quadrozzi Enterprise

R

Rahway Yacht Club
Rapp's Boat Yard
Raritan Marina
Raritan River Boat Club
Raritan Riverkeeper
Raritan Yacht Club
RCA Asphalt
Red Bank Marina
Red Bank Municipal Marina
Red Hook Boaters
Red Hook Container Terminal
Reel Fun Sportsfishing
Reicon Group
Reinauer Transportation
Resilience Adventures
Reynolds Shipyard Corporation
Rib New York
Richmond County Yacht Club
Richmond Recycling LLC
Riptide III
River Barge Park Marina

Riverdale Yacht Club
Riverview Towers
Robbins Reef Yacht Club
Robinson's Anchorage
Rockaway Jet Ski
Rocket Charters
Rockfish Charters
Rocking the Boat
Row New York
Rumson County Club
Rutgers University

S

Sail Away New York
Sailors NYC
Sal's Scrap Metal
Sandy Hook Bay Marina
Sandy Hook Pilots
Sandy Hook Yacht Sales
Scara Mix
Schupps Landing
Sea Fever Excursions
Sea Hunter
Sea Queen VII
Sea Scout Ship 228
Sea Tiger II
Sea Tow Marine Services
Sea Travelers Marina Inc
Seaboard Marine
Seafarers International Union
Seamens Church
Seaport Inlet Marina
Seashore Restaurant & Marina
Seastreak Ferry

Seaway Marine Corporation
Sebago Canoe Club
Shark Inlet Charters
Shark River Beach & Yacht Club
Shark River Municipal Marina
Shark River Yacht Club
Shearwater Classic Schooner
Sheepshead Bay Yacht Club
Shell Oil Company
Shelter Cove Marina
Shipyard Marina
Shrewsbury River Yacht Club
Shrewsbury Sailing & Yacht Club
SIMS Metal Management
SIMS Recycling
SIS Yachts Marina & Service Center
Skyline Cruises
Smith's Marina & Boat Yard
Snipes Boat Club
South Amboy Boat Club
South Amboy Marina
South Brooklyn Marine Terminal
South Minneford Yacht Club
South River Boat Club
South Street Seaport Museum
Southern Services Group
Sparks Columbia Rowing Camp
Spectraserv Inc
Spirit City Cruises
Staten Island Asphalt
Staten Island Ferry
Staten Island Recycling
Staten Island Terminal
Staten Island Yacht Club

Staten Island Yacht Sales
Statue Cruises
STC Marine
Sterling Equipment
Stevens Institute of Technology
Stevens Technical Service
Stillwell Ready Mix
Sun Line Cruises
Sunoco Logistics Partners
Sunrise Marina
SUNY Maritime College
Surfside Marina

T

T&T Scrap Metal
Tamaqua Bar & Marina
Teal Cruises
Technico Marine Corporation
The Sailmaker Marina
The Sea Hawk
The Seda Marine Company
Thomas J Brown & Son
TM Maintenance Inc
TNT Machine
Torbell Inc
Total Marine at Seaview
Tottenville Marina
Touring Kayak Club of New York
Toyota Logistics Services
Tractel Inc
Trade Winds Marina
Tremley Point Sea Scout Base
Trevcon Construction
Tribeca Sailing

Tugamotorsports Jetski Rentals
Twin Lights Marina
TW Smith Welding Supply Corporation
Two River Water Reclamation

U

Union Maintenance Corps
United Pilots Association
United States Coast Guard
US Army Corps of Engineers
US Concrete
USS Baylander

V

Vane Brothers Co
Varuna Boat Club
Venice Marina
Ventura
Viking Marina
Village Community Boathouse
Von Dohln Marina on the Hudson

W

Wagner Boat Works
Wagner's Twin Towers Marina
Wallenius Wilhelmsen Logistics
Warren George Inc
Waterfront Museum
Weeks Marine
West 79th St Boat Basin
Wet Dream Sportfishing
Wharfside Manor Marina
White Beach Marina
Whitepoint Shores

Whitestone Marina
Wickberg Marine Contracting
Willets Point Asphalt Corporation
William Donovan Municipal Marina
Williamsburgh Yacht Club
Windserve Marine
Wittich Bros Marine
Women in Canoe Dragon Boat Racing
Woodbridge Marina
Woodbridge Township Public Marina
World Yacht

World's Fair Marina
Worldwide Ferry Safety Association
& Sustainable Ports

X

Xtreme NY Dragon Boat Racing

Y

Yacht Service International

Z

Zuback's Marine



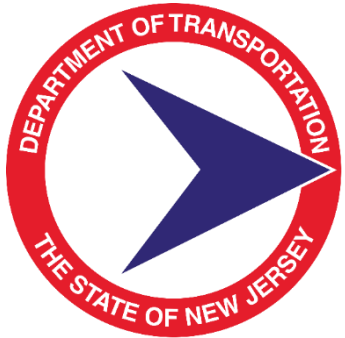
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