



**Boston By Boat: An Agenda for the Future
Interim Report
June 6, 2008**

Introduction

“Boston By Boat” is a special project of Save the Harbor/Save the Bay. It was designed to assess existing passenger water transportation services in the Boston Harbor Region and to determine how best to strengthen and promote commercial and recreational passenger vessel use by commuters, local and regional residents, businesses, institutions, and tourists.

The initiative is led by David Spillane, Director of Planning and Urban Design at Goody Clancy, noted Maritime Economist Frank Mahady of FXM Associates, and by Bruce Berman, Director of Strategy and Communications at Save the Harbor / Save the Bay.

Outreach

Boston By Boat examined the current state of passenger water transportation in the broadest sense, including commuter services, water taxis, excursions like harbor tours, dinner cruises, and whale watches, and seasonal ferries to Provincetown, Salem, and the Boston Harbor Islands National Park.

To date Save the Harbor/Save the Bay has reached out to more than 100 stakeholders, including operators, harbor advocates, waterfront landowners, industry experts and policy-makers. We asked participants to fill out a brief survey and to share their unique perspective on the current state of water transportation with us. We also asked each respondent what one thing they would change if they could.

In addition to the surveys, we also conducted a series of face-to-face interviews with a number of advocates and operators to get a fuller sense of issues of concern to them. Notes from these conversations were integrated into the survey data.

We then organized initial responses to the survey by question, and shared them with an Advisory Committee of 30 stakeholders. This group was asked to respond to the comments, and elaborate on any ideas they thought were missing.

After integrating all additional comments into the Survey Digest, we organized the responses according to rough themes and distributed them electronically to the group as a whole in preparation for the “Boston By Boat” summit held on May 13 at the Exchange Conference Center on Boston’s Fish Pier.

At the same time, we began to assemble an inventory of existing passenger vessel services, and reached out to operators and the MBTA to get a sense of both ridership and rider demographics. Using this information, we were able to assemble a rough picture of both the available services on Boston Harbor, and the economic opportunity they represent.

The Economic Picture

Using rough ridership and capacity information from operators of a majority of the scheduled services on Boston Harbor, Frank Mahady was able to sketch a fairly comprehensive picture of the current and potential economic impact of passenger vessel services on Boston Harbor.

- ⇒ In 2007, passengers took about 2.5 million trips on commuter ferries, water shuttles, excursion/charter boats, and water taxis.
- ⇒ Commuter ferries and water shuttles accounted for about half of these trips. The vast majority (nearly 90%) of these commuter trips were taken by a core group of approximately 5,000 passengers on MBTA routes.
- ⇒ Charter, excursion and water taxi services account for approximately the same number of trips as commuter services but, not surprisingly, served a larger number of riders. Nearly 1,000,000 people—primarily regional residents and visitors—took excursion, charter, and water taxi trips in 2007. Revenues per rider are significantly higher for these trips than revenues from comparable commuter service trips.
- ⇒ Visitors to Boston, including regional residents and tourists, spent over \$250 million in Boston hotels, restaurants, and retail shops as part of their boating day.
- ⇒ Mahady concluded that better utilization of the current capacity of existing vessels could more than double both the number of excursion trips on Boston Harbor and the already high level of visitor spending.

Although the numbers we presented were estimates, they tell an interesting story:

- Capacity: With the existing passenger vessels already in service, there is plenty of room for most, if not all, services to handle many more passengers.
- Who's Riding: While a core group of approximately 5,000 dedicated commuters account for about one million trips every year, another nearly one million visitors and residents used the water for non-commuter purposes in 2007.
- Growth Potential: Without investing in additional vessels or docks, the passenger vessel industry could nearly double its ridership (and revenue) without stretching market potential, add several thousands of jobs to the regional economy by attracting more regional residents and lengthening the stay of tourists, and contribute millions to city and state tax revenue.
- Turning Potential into Ridership: One key question that emerged from this analysis is how to better capture this market potential, which we have already begun to address. (See below.)

Transportation Summit: Key Themes and Emerging Consensus

On May 13, 2008 more than 60 government officials, boat operators, harbor advocates and businesses participated in a water transportation summit, *Boston By Boat: An Agenda for the Future*. These individuals contributed expertise and insights into every aspect of water transportation in Boston Harbor.

During the summit participants reviewed and discussed a comprehensive list of survey responses—numbering several hundred items-- and suggested additional issues, concerns and potential improvements. The summit concluded with a voting exercise where participants identified both their priority concerns and the action steps needed to advance the success of water transportation within the harbor.

The voting exercise demonstrated a remarkably shared understanding of the issues and the solutions. Participants with very different perspectives highlighted a few similar issues as priorities for attention, and several key themes emerged. The following is a preliminary summary of the issues that attracted the most comment.

What is working:

There was wide agreement that, in general, the services that currently exist work well. Some services double up as public transportation and recreational services

What is *not* working:

There was a broad consensus that, from several perspectives, the existing potential is not being tapped. Key concerns included a lack of public information, day-to-day operational challenges, environmental issues, coordination, the need for affordable access and additional investment in infrastructure.

Participants noted:

- Lack of basic information, signage and marketing is limiting use of services
- Lack of public oversight and coordination is resulting in fragmented services with no sense of a real system.
- Limited lower cost service to the harbor islands is a barrier to access for working families.
- Some existing vessel and dock designs make access and operations difficult and do not minimize environmental impacts

What to do?

Though there were a wide variety of perspectives on how to best address the challenges and take advantage of the enormous potential opportunity, there was an emerging consensus that a few simple things, done well, could put a million new people a year on Boston Harbor without buying a boat or building a dock, though the group agreed that we definitely need new boats and new docks as well.

Participants noted:

- Publicize, market and promote the existing services with one central source of information, better signage
- Create a unified system design and establish an oversight board with the ability to plan and monitor service delivery
- Enhance the effectiveness of existing services (all boats to all landings, improve docks, purchase new vessels, bulk fuel purchases, better waiting facilities, expanded affordable service to the harbor islands)
- Go GREEN with new vessels to promote the development of a state of the art system

There were other important areas of discussion as well, including

- The seasonal Salem ferry is one model for expanding water transportation service that can bring both commuters and visitors from outside Boston to the City by boat. The seasonal Salem ferry carries mostly non-commuters who are charged market rates that subsidize regular commuters. Public funds were used to acquire the Salem ferry vessel for lease to a private operator.
- Access to the current supply of prime dockage serving water taxi, commuter, and excursion and charter vessels is limited. In some instances existing facilities in Boston are inadequate to handle current needs. For example, the Town of Winthrop has just issued an RFP for non-subsidized water transportation services to Boston that can take advantage of its new multi-use public pier. One potential barrier to this new service – as well as others in the future – is the availability of dockage at prime locations in Boston within walking distance of employment and recreational destinations.

Next Steps

Addressing each of the key priorities identified by summit participants—and many other important related concerns – will require multiple actions by many of the people that have a stake in the success of passenger water transportation in the harbor region.

Save the Harbor/Save the Bay has begun a series of follow up conversations with summit participants to explore next steps. We look forward to reporting back to all summit participants and other stakeholders later this summer on the results.

In the meantime, as a first step, we have launched Boston By Boat (www.bostonbyboat.com), the first comprehensive on-line listing of water transportation services available around the harbor.

We are pleased to report that the site has already attracted significant interest and traffic confirming the belief of summit participants that if we work together to connect the dots and make it easy for people to get on a boat, we would be well on the way to tapping the full potential of passenger water transportation and taking Boston Harbor off the "Best Kept Secrets" list.