ANACORTES MARITIME STRATEGIC PLAN 2018

CITY OF ANACORTES 1891

EDASC
Economic Development Alliance of Skagit County

PORT OF ANACORTES Est. 1926

ACKNOWLEDGEMENT

The Maritime Strategic Plan would not have come together as it did without the invaluable information provided by the individuals and members of our maritime community. The strategies of this Plan were put together after meeting with members of this vibrant community that have first-hand knowledge of what it will take to maintain, support and grow our incredible maritime heritage and community.

We conducted extensive outreach to approximately 123 individuals and businesses who work within our community's maritime industry and were able to meet with approximately 46 individuals. We realize that time constraints did not allow more participation but will continue to work with all of the businesses and individuals as we finalize this important strategic plan.

We extend a sincere thank you and acknowledge the following participants; their assistance provided the information to develop a well thought out plan to help us support the maritime industries through the coming years.

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Andy Schwenk	**Northwest Rigging**
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Doug Lombard	**Marine Service Center**
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Jim Raard	**Marine Service Center**
Jimmy Blais	**MJB, Gary Merlino Construction**
John Hackstadt	**Best Day Yacht Sales**
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Mark Turner	**Oracle**
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Mystic Sea Charters	**Mystic Sea Charters**
Nordic Yachts Northwest	**Nordic Yachts Northwest**
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ANACORTES MARITIME STRATEGIC PLAN 2018

Contents

Anacortes Maritime Strategy 1

BACKGROUND 1

OUTLINING THE NEEDS 1

GOALS OF THIS STRATEGY 3

Goal 1: Build public support for and engagement in development of a thriving, sustainable Anacortes maritime sector. 3

Goal 2: Position Anacortes as the Pacific Northwest's center for the emerging future maritime industry. 5

Goal 3: Establish Anacortes as a state-wide and national center for maritime workforce development, education, and research and development. 11

Goal 4: Establish Anacortes as a regional and international destination for marine-related tourism. 13

APPENDIX 16

Appendix A: Maritime Industry Definitions 17

Appendix B: Anacortes Maritime Sector Employment, 2016 19

Appendix C: Maritime Sector Interview Questions 20

Appendix D – SWOT – Strengths, Weaknesses, Opportunities, Threats 21

Anacortes Maritime Strategy

BACKGROUND

In September 2016, the City of Anacortes and Port of Anacortes, together with the Economic Development Alliance of Skagit County (EDASC), initiated discussions to develop a new comprehensive strategic plan for promoting and expanding a sustainable maritime economy in Anacortes and Skagit County, while preserving the authentic maritime culture of Anacortes. During 2017, the executive teams of the City, Port, and EDASC met and conducted an extensive set of interviews with a diverse range of local maritime sector manufacturers, services providers, retail businesses, property owners, educational institutions, and non-governmental organizations, among others, to assess the characteristics, strengths, challenges, and opportunities facing the maritime sector in Anacortes (interview questions listed in Appendix C). These interviews were augmented by discussions of the Skagit County Maritime Industry Cluster Working Group convened by EDASC during 2016 and 2017, which incorporated a broader cross-section of countywide maritime industry stakeholders. This draft strategic plan is an outcome of these discussions and interviews.

OUTLINING THE NEEDS

The maritime industry is one of the oldest, most historically important, and economically impactful sectors in Washington State and in Anacortes. It encompasses a broad, diverse range of businesses and trades, including: shipbuilding, repair, and maintenance; recreational boating and boat building; maritime logistics and shipping; commercial fishing and seafood products; maritime support services; and passenger water transportation.

In Washington State, employment across these six maritime industry categories totaled 69,500 direct jobs in 2015, which paid over $4.7 billion in wages. The average salary for these jobs was $67,000, above the state average of $56,700 (not including benefits). Every maritime industry job in Washington supports 1.8 jobs elsewhere in the economy; for every $1 million in revenue, 11 jobs are supported elsewhere in the economy. Moreover, the industry is growing: industry-wide revenues have grown 2.4 percent per year from 2012 to 2015, with the largest growth rate found in maritime logistics and shipping at 5.2 percent.[1]

Anacortes has a long history and rich culture related to the maritime industry. In the six maritime subsectors identified above, Anacortes had an estimated 1,186 jobs across 43 employers in 2016, which paid over $59 million in wages with an average salary of $49,863, according to data from the Washington State Employment Security Department.[2] The city hosts a diverse range of marine manufacturers, along with one of the leading recreational boating marinas in Washington State.

Anacortes is a natural center in Puget Sound for the maritime industry, with unique, superb assets that position it as one of the most competitive locations in the Pacific Northwest for sustained and future growth in this sector. These include:

- The Port of Anacortes, one of only eight deep water ports in Washington State, which can accommodate new Panamax vessels with additional dredging. The port ranked 49th among U.S. ports (and 5th among Washington State ports) in total trade by cargo tonnage during 2016, with 10.7 million tons, ranking 34th for total domestic trade (8.3 million tons) and 36th in total exports (2.2 million tons).[3]

- Concentrated access to a diverse, highly skilled maritime sector workforce.

[1] *Washington State Maritime Sector Economic Impact Study. 2017 Update (April 2017)*, http://www.maritimefederation.com/uploads/2/9/9/6/29962189/cai.wmf.maritime_cluster_study_2017_update.2017_0413.pdf.
[2] See Appendix B for more information.
[3] According to data collected by the American Association of Port Authorities.

- Skagit Valley College and the Northwest Career and Technical Academy Marine Technology Center in Anacortes, which hosts Washington State's designated Center of Excellence for Marine Manufacturing & Technology, and offers the only comprehensive marine technology program on the U.S. West Coast.

- Two marine research facilities—Western Washington University's Shannon Point Marine Center and Walla Walla University's Rosario Beach Marine Laboratory, with close proximity to a third facility, the Padilla Bay Natural Estuarine reserve.

- One of the most scenic locations of any Pacific Northwest community, Anacortes is a leading destination for marine-related tourism in the Pacific Northwest. It is the primary point of access to the San Juan Islands, and Fidalgo Island itself offers some of Washington State's finest marine recreation opportunities.

- A location convenient to Interstate 5; close proximity to greater Seattle, Vancouver, and Victoria; and strategically situated for Alaska-related maritime logistics and operations.

The sustained growth of the maritime sector is of great importance for Anacortes's continued prosperity and economic development. Anacortes is well-positioned to offer a cost-competitive location for maritime businesses being priced out of other Pacific Northwest locations. Its desirable quality of life and tourism attractions are being enhanced by new investments in infrastructure and projects such as the Guemes Channel Trail that increase public access to the waterfront. There is broad community and local political support for a robust, diversified maritime industry sector. Moreover, the emerging needs for next generation vessels and Pacific fishing fleet recapitalization offers immense opportunities for Anacortes, which is already home to world-class shipbuilders and repair and maintenance services.

At the same time, there are concerns about the future prospects of the industry in Anacortes, and indeed Washington State. In particular, marine manufacturers describe difficulties finding workers trained with the necessary technical skills, while young people in Anacortes and Skagit County are increasingly pursuing career paths that do not include the maritime industry. Retaining existing businesses is taking on increasing importance, with challenges including the regulatory environment and burdens; infrastructure constraints and limitations; and business succession planning for business owners approaching retirement, among others.

This strategy is intended to serve as a blueprint of guiding objectives and tangible actions that the City and Port, along with EDASC and members of the broader local and regional community, can take to strengthen the foundations of the maritime industry in Anacortes. These actions will advance its sustained growth, retain existing businesses, attract new industry, train a world-class workforce, and enhance its role as a tourism destination.

This strategy is timely as it coincides with the launch in December 2017 of the Governor's *Washington Maritime BLUE: 2050 Vision for Accelerating Innovation* project. This strategy aims to make Washington State home to the nation's most sustainable maritime industry by 2050, leading the United States in the maritime shift towards decarbonization, clean technology innovation, and best management practices. These practices will support a strong maritime economy with living wage jobs, a healthy environment and resilient communities. Mayor Laurie Gere is serving on the Governor's Maritime Innovation Advisory Council overseeing development of this strategy, and the Port of Anacortes and EDASC are actively involved in related activities. Through the Anacortes Maritime Strategy, Anacortes and Skagit County can take a leading role within this statewide effort and position itself as Washington's primary location for the future maritime industry.

GOALS OF THIS STRATEGY

Goal 1: Build public support for and engagement in development of a thriving, sustainable Anacortes maritime sector.

Goal 2: Position Anacortes as the Pacific Northwest's center for the emerging future maritime industry.

Goal 3: Establish Anacortes as a state-wide and national center for maritime workforce development, education, and research and development.

Goal 4: Establish Anacortes as a regional and international destination for marine-related tourism.

GOALS

Goal 1: Build public support for and engagement in development of a thriving, sustainable Anacortes maritime sector.

Objective	Actions: Near Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes			
Increase public access to waterfront	1 Improve Washington Park Boat Ramp/Boat Dock, and increase access to industrial and commercial boat ramp at Fidalgo Bay 2 Review management practices for access to industrial and commercial boat ramp at Fidalgo Bay	1 Complete Guemes Channel Trail project 2 Develop public boat ramp on Fidalgo Bay	1 Explore feasibility of community boatyard in Anacortes
Increase public awareness and understanding of the value of the maritime industry to the city and regional economy	1 Publish joint communications by Mayor and Port Executive Director about increased alignment and how this will support a strategic approach by Anacortes towards the maritime industry	1 Conduct longer-term, ongoing communication efforts in community to highlight the importance of the maritime industry to the Anacortes economy 2 Develop a vision for a "sustainable marine community" that extends along Fidalgo Bay from Cap Sante Marina to Anacortes	

Objective	Actions: Near Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
		Marina, incorporating Seafarers Park, waterfront trails, existing and new marinas, and residential and commercial space	
Build alignment and cooperation among Anacortes and Skagit County stakeholders in the maritime industry	1 Convene joint meeting(s) of City and Port to present Anacortes Maritime Strategy to the public		
LEAD ORGANIZATION: City of Anacortes, Port of Anacortes, Anacortes Chamber of Commerce, EDASC, businesses, state and federal regulatory agencies, etc.			
	2 Engage Anacortes Chamber Marine Trades Committee, EDASC Skagit Maritime Industry Working Group, and others to build synergies across Skagit County's maritime sector		
LEAD ORGANIZATION: City of Anacortes			
Ensure Anacortes remains a livable community, including for the marine trades workforce		1 Offer a diverse range of affordable housing options in Anacortes to enable the local marine industry workforce to live within the city if they choose	
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes			
			1 Conduct research on potential impacts of sea-level rise on Anacortes and economic implications, and develop action plan for preparing for these changes

Goal 2: Position Anacortes as the Pacific Northwest's center for the emerging future maritime industry.

Objective	Actions: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: Anacortes Chamber of Commerce, Port of Anacortes, City of Anacortes, EDASC			
Support and retain existing maritime industry businesses, and facilitate their growth	1 Continue support of local maritime-related businesses through facilitation with local, state, and federal officials	1 Identify and implement regulatory zoning, and policy changes that will ensure optimal use of industrial/commercial lands for maritime-related business	
	2 Benchmark similar U.S. communities and identify best practices, including regulatory, that will support Anacortes in maintaining a competitive edge		
LEAD ORGANIZATIONS: Port of Anacortes, City of Anacortes			
		2 Enhance infrastructure, including installation of travel lifts and cargo loading/unloading facilities	
LEAD ORGANIZATIONS: Anacortes Chamber of Commerce, EDASC			
	3 Support local maritime sector businesses with succession planning, access to finance and capital, and in addressing other challenges to ensure their retention in Anacortes		

Goal 2: Position Anacortes as the Pacific Northwest's center for the emerging future maritime industry.

Objective:	Actions: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: Port of Anacortes, City of Anacortes, state & federal regulatory agencies, EDASC			
	4 Work with local maritime sector businesses to further understand regulatory constraints and work with various agencies to advance business interests in a way that balances regulatory interests		
LEAD ORGANIZATIONS: City of Anacortes			
	5 Develop a municipal fiber optic broadband system within the city limits to provide more opportunities and essential infrastructure for the maritime industry		
LEAD ORGANIZATIONS: EDASC, Anacortes Chamber of Commerce, business community, higher education institutions			
Build new synergies among local maritime industry businesses	1 Increase spirit of cooperation and enhanced communication among existing businesses	1 Foster opportunities that bring together Anacortes marine manufacturers with leading Skagit County advanced composites manufacturers, including around carbon fiber recycling	1 Develop consortiums of local businesses to work jointly on bids for larger projects, such as in fields like maintenance, repair and operations (MRO)

Goal 2: Position Anacortes as the Pacific Northwest's center for the emerging future maritime industry.

Objective:	Actions: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: EDASC with Port of Anacortes, City of Anacortes, Anacortes Chamber of Commerce, Marine Trades Committee			
Attract new maritime businesses, with focus on green/sustainable businesses and innovative technologies	1 Conduct comprehensive inventory of maritime sector assets in Anacortes and Skagit County in order to identify industry gaps to fill, including industrial and commercial properties potentially available for marine industry-related development	1 Strategically address and prepare for emergent technologies—including autonomous shipping, artificial intelligence, and electronic operational platforms—to strengthen Anacortes' position as a national center for maritime workforce development, education, and research and development	
LEAD ORGANIZATIONS: Port of Anacortes, City of Anacortes, EDASC, business community, Anacortes Chamber of Commerce			
	2 Promote Anacortes as an ideal location for marine industries, including at leading industry trade shows. Focus on green, renewable energy-related industries, and cutting-edge technologies	1 Work together to attract new business to Anacortes that fill supply chain gaps to support the needs of local manufacturers	
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes, EDASC, consultant to conduct study			
Establish Anacortes as a central location for retrofitting the Pacific fishing fleet	1 Promote local businesses that perform vessel maintenance and recapitalization	1 Commission an analysis of how to position Anacortes as central location for vessel maintenance and recapitalization	

Goal 2: Position Anacortes as the Pacific Northwest's center for the emerging future maritime industry.

Objective:	Actions: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes			
Increase Anacortes's role within state, regional, and national-level initiatives advancing the maritime industry	1 Participate and take leadership within Governor's Washington Maritime Blue Strategy initiative		
LEAD ORGANIZATIONS: Port of Anacortes, EDASC			
	2 Increase collaboration among Pacific Northwest Ports and identify particular niches on which Anacortes should focus		
LEAD ORGANIZATIONS: EDASC			
	3 Initiate conversations with counterparts in Canada to discuss issues of mutual interest related to the maritime sector, including tourism, traffic, and infrastructure. Identify whether there are potential opportunities for cooperation related to these priorities, such as information sharing, advocacy, or other projects		
LEAD ORGANIZATIONS: City of Anacortes, local Tribal leaders, state agencies as appropriate (Washington State Dept. of Commerce, Ecology, Fish & Wildlife, Governor's Office)			
	4 Engage with regional Tribes for discussion and coordination on issues of mutual interest related to Anacortes and Skagit County maritime sector		

Goal 2: Position Anacortes as the Pacific Northwest's center for the emerging future maritime industry.

Objective:	Actions: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes, EDASC, businesses			
Position Anacortes strategically as a leading support center for business operations and logistics in Alaska and the Arctic	1 Develop comprehensive understanding of business linkages between Anacortes, northwestern Washington, and Alaska, with focus on mutual interest with Alaskan business and government leaders around which future cooperation may be of value	1 Identify 1-3 niche areas in which Anacortes can take leadership related to Alaska and the Arctic, and pursue related strategies	
LEAD ORGANIZATIONS: EDASC			
	2 Keep abreast of trends in Alaska and the Arctic that could create opportunities or present issues for Anacortes businesses. Engage with federal government and other organizations as appropriate		
LEAD ORGANIZATIONS: Port of Anacortes			
Increase value and volume of exports through the Port of Anacortes		1 Identify and pursue funding to enhance infrastructure to enable expanded trade and exports	

Goal 2: Position Anacortes as the Pacific Northwest's center for the emerging future maritime industry.

Objective:	Actions: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: Port of Anacortes, EDASC			
	1 Conduct analysis of short and long-term seaport/cargo and logistics opportunities for Port of Anacortes	2 Investigate where land constraints for storage and infrastructure at Port of Anacortes Marine Terminal could be met through potential partnership with the Port of Skagit or other locations within Anacortes and Skagit County	
	2 Develop marketing strategy to position the Port of Anacortes's deep water terminal as a strategic location for access to the Asia-Pacific and Alaska/Arctic		
	3 Create Foreign Trade Zone after analysis of business demand		

Goal 3: Establish Anacortes as a state-wide and national center for maritime workforce development, education, and research and development.

Objective	Actions: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: Skagit Valley College, Skagit STEM Network, Anacortes School District, Northwest Career and Technical Academy, Anacortes Chamber of Commerce			
Increase interest among K-12 students in careers in marine trades	1 Develop and implement targeted outreach program(s) in Anacortes aimed to encourage K-12 students to explore careers in marine trades as part of the Skagit STEM Network's program of work and Marine Technology Center. As part of this, work to encourage greater participation of historically under-represented people and communities in maritime sector employment opportunities		
LEAD ORGANIZATIONS: Skagit Valley College, Skagit STEM Network, local businesses, EDASC, Anacortes Chamber of Commerce Marine Trades Group, Northwest Career and Technical Academy			
Encourage businesses to develop and support marine trades sector training programs locally		1 Increase participation by local employers and workers in marine trades mentoring and apprenticeship programs	

Goal 3: Establish Anacortes as a state-wide and national center for maritime workforce development, education, and research and development.

Objectives:	Actions: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes, EDASC			
Expand maritime research and development activities in Anacortes	1 Through engagement with potential business expansion leads, identify research activities that could take place locally that would help to make Anacortes an attractive location		1 Attract national- or international-level R&D facility to locate in Anacortes
LEAD ORGANIZATIONS: Northwest Innovation Resource Center, Maritime Innovation Center (Seattle), Skagit Valley College, local businesses			
Foster entrepreneurship and innovative businesses in Anacortes in marine trades		1 Establish maritime industry-focused makerspace-type facility in Anacortes 2 Identify niche technologies where Skagit County based organizations can collaborate to develop and commercialize improved technologies for maritime products	1 Establish regional satellite for the Maritime Innovation Center being established in Seattle, with particular focus on workforce training and development

Goal 4: Establish Anacortes as a regional and international destination for marine-related tourism.

Objective	Action: Near-Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: Northwest Marine Trade Association, Port of Anacortes, Anacortes Chamber of Commerce, Marine Trades Committee, EDASC			
Increase number of recreational boating visitors to Anacortes	1 Continue to hold successful Anacortes boat shows		
LEAD ORGANIZATIONS: Port of Anacortes, Anacortes Chamber of Commerce Marine Trades Committee, EDASC			
	2 Promote Anacortes as a destination for recreational boat purchases, services, and moorage at Seattle Boat Show		
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes, Anacortes Chamber of Commerce			
	3 Increase "shoulder season" transient moorage at Cap Sante Marina through strategic promotions and partnerships with event producers		
LEAD ORGANIZATIONS: Anacortes Chamber of Commerce, Anacortes Small Boat Center, Anacortes School District, Local Boating Organizations			
Encourage increased interest in marine recreation and make it more accessible	1 Using existing research or conducting a new survey, measure views of young adults to identify specific experiences they are looking for related to maritime sector	1 Develop introduction to marine recreation-type experiences targeted at K-12 students, university students, et al, that are affordable, and facilitate opportunities to get them engaged	

Goal 4: Establish Anacortes as a regional and international destination for marine-related tourism.

Objectives:	Actions: Near Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: Anacortes Chamber of Commerce, countywide tourism organizations, EDASC, Industry Cluster Working Groups			
Strengthen Anacortes's position as a leading destination for marine recreation-related activities	1 Develop and implement marketing and promotional outreach campaign of Anacortes for marine-related recreation and tourism, with a unified message and focus on eco-tourism assets	1 Develop Anacortes as a major small cruise ship port	
LEAD ORGANIZATIONS: Port of Anacortes, City of Anacortes, EDASC, Skagit County, Washington State Department of Commerce			
	2 Continue planning and development Events Center at Cap Sante Marina to increase tourism and hospitality assets in Anacortes (e.g. hotel, events center, restaurants)	2 Complete development of Events Center at Cap Sante Marina	
LEAD ORGANIZATIONS: Washington State Department of Transportation, Anacortes Chamber of Commerce, City of Anacortes, EDASC			
			1 Ensure completed remodel of the Anacortes Ferry Terminal supports local businesses and addresses traffic/ access issues, etc.
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes, EDASC			
		3 Address any required infra-structure needs to allow access by float planes during summer months	

Goal 4: Establish Anacortes as a regional and international destination for marine-related tourism.

Objectives:	Actions: Near Term (0-3 Years)	Actions: Mid-Term (4-7 Years)	Actions: Long-Term (8-10 Years)
LEAD ORGANIZATIONS: City of Anacortes, Port of Anacortes, Anacortes Chamber of Commerce, Local Boating Organizations			
Strengthen Anacortes's position as a leading destination for marine recreation-related activities		4 Make Fidalgo Bay a premier destination for sailboat racing	

This Maritime Strategic Plan is approved by the City of Anacortes on this 25th day of February, 2019, and fully supported by City of Anacortes Mayor Laurie Gere, Port of Anacortes Executive Director Dan Worra, and Executive Director of the Economic Development Alliance of Skagit County CEO John Sternlicht.

Mayor Laurie Gere, City of Anacortes

Executive Director Dan Worra, Port of Anacortes

CEO John Sternlicht, EDASC

APPENDIX

Appendix A: Maritime Industry Definitions

The *Washington State Maritime Sector Economic Impact Study (April 2017 Updated Edition)*, prepared for the Washington Maritime Federation and Workforce Development Council of King County by Community Attributes, Inc. (CAI), defines the maritime sector to include the NAICS codes listed below. In the 2017 update, which examined 2015 industry data, a goal of the Washington Maritime Federation was to realign the definition of the industry in order to more accurately represent the full range of maritime sector activities taking place in Washington State. In addition to NAICS codes, CAI conducted custom analysis for subsectors that were not adequately defined by NAICS codes alone; to do this, methods included assembling a list of businesses in the subsector through interviews, industry association member lists, and other supplemental sources. A full explanation of the study methodologies is included in the report.

Ship and Boat Building, Repair and Maintenance

- Ship building and repairing (336611)
- Boat building (336612)
- Puget Sound Naval Shipyard (Custom)

Recreational Boating and Boat Building

- Recreational Boat Building (Custom)
- Charter Fishing (Custom)
- Marinas (713930)
- Boat dealers (441222)
- Scenic and sightseeing transportation, water (487210)

Commercial Fishing and Seafood Products

- Finfish farming and fish hatcheries (112511)
- Shellfish farming (112512)
- Finfish fishing (114111)
- Shellfish fishing (114112)
- Seafood product preparation and packaging (311710)
- Fish and seafood merchant wholesalers (424460)

Maritime Logistics and Shipping

- Deep sea freight transportation (483111)
- Coastal and great lakes freight transport. (483113)
- Inland water freight transportation (483211)
- Support activities for rail transportation (488210)
- Port and harbor operations (488310)
- Marine cargo handling (488320)
- Navigational services to shipping (488330)
- Freight transportation arrangement (488510)
- Refrigerated warehousing and storage (493120)
- Rail (custom)
- Trucking and Drayage (custom)
- Warehousing (custom)

Passenger Water Transportation

- Deep sea passenger transportation (483112)
- Coastal and great lakes passenger transport. (483114)
- Inland water passenger transportation (483212)

- Other support activities for water transport. (488390)

Maritime Support Services

- Geotechnical & Environmental (Custom)
- Naval Architecture (Custom)
- Law (Custom)
- Accounting (Custom)
- Associations (Custom)
- Education (Custom)
- Marine Construction and Engineering (Custom)
- Maritime Insurance (Custom)
- Other support (Custom)

Appendix B: Anacortes Maritime Sector Employment, 2016

Source: Washington State Employment Security Department

Notes: The below data includes all NAICS codes covered in Appendix A specific to the Anacortes, WA zip code (98221). It does not include data for categories in Appendix A listed as "custom."

Average annual employment and wage, 2016	**employers**	**employment**	**wage**	**average wage**
Total	**43**	**1,186**	**$59,133,514**	**$49,863**
Total Ship and Boat Building, Repair & Maintenance	6	386	$24,977,645	$64,653
Total Recreational Boating & Boat Building	14	102	$3,530,407	$34,697
713930 - Marinas	4	47	$1,793,867	$38,371
441222 – Boat Dealers	4	26	$953,080	$36,657
487210 – Scenic and Sightseeing Transportation, Water	6	29	$783,460	$27,016
Total Commercial Fishing & Seafood Products	11	504	$18,764,989	$37,220
Total Maritime Logistics & Shipping	8	159	$10,170,859	$64,001
Total Passenger Water Transportation	4	35	$1,689,614	$48,622

Appendix C: Maritime Sector Interview Questions

Anacortes Maritime Industry Strategic Plan
Conversation Starting Questions for Industry Leaders & Stakeholders

1. What are Anacortes's strengths in the maritime industry? Do you have suggestions to maximize/build on that strength?

2. How do you see Anacortes as different from other communities with robust maritime industries?

3. What obstacles to growth do you see for maritime industries in Anacortes?

4. What opportunities for your industry do you foresee?

5. Are there specific regulations or regulatory entities that prohibit growth?

6. What industry trends do you see developing locally, statewide, and nationally?

7. What specific skills/training needs does your business have? Short term? Long term?

8. Do you have future expansion or hiring plans? Short term? Long term? What does that look like?

9. What role do you think local government (City/Port/County) could play in advancing your business and industry interests?

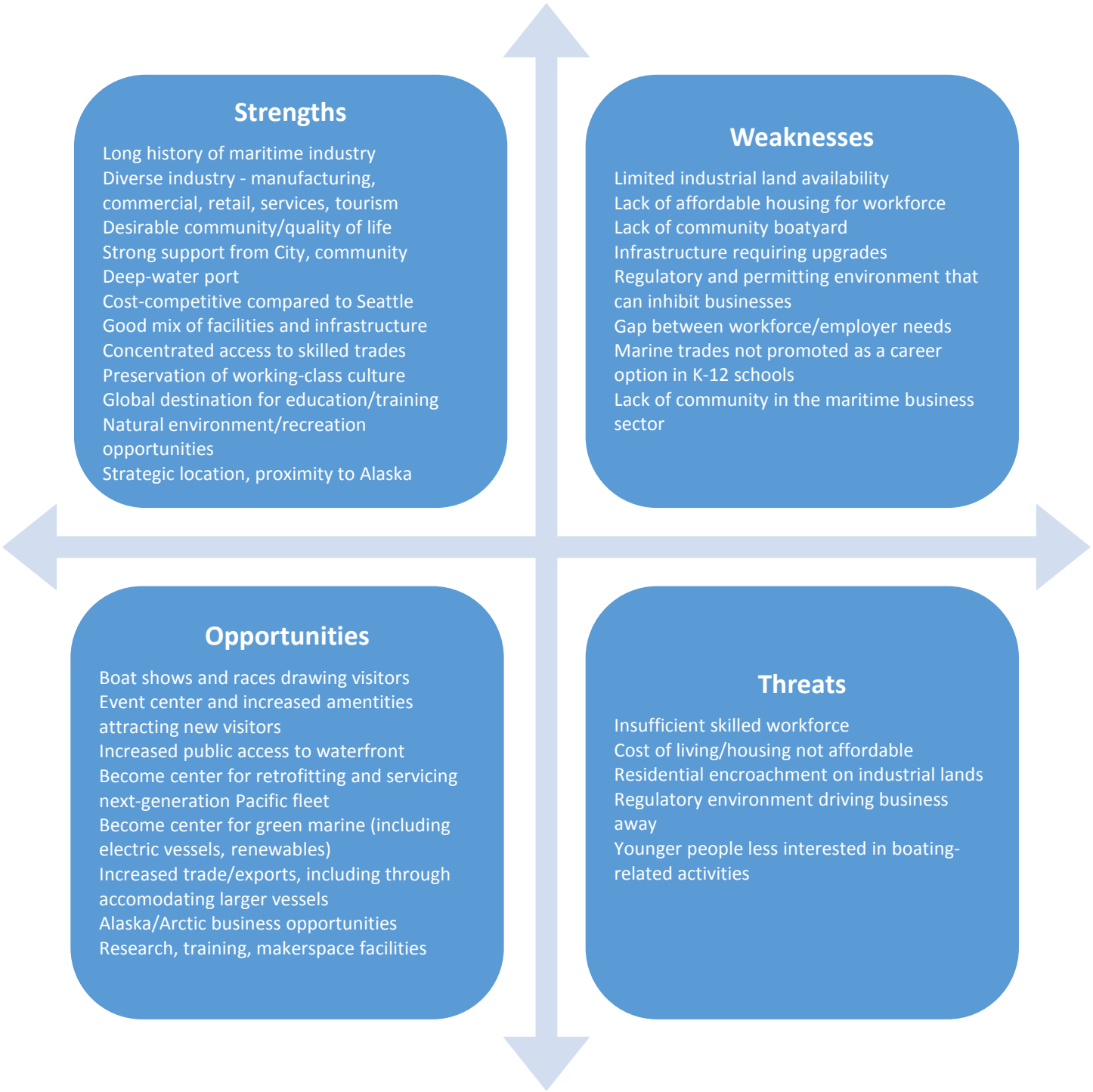
10. Do you have any infrastructure needs (boat lift/launch, boat yard space)?

11. Would it be helpful to your interests to have a complete database of marine related businesses?

12. Are there other businesses within Anacortes that are complementary to yours? Suppliers? Technicians? Builders? If not, would it be beneficial to attract such businesses to town?

13. What are your thoughts on the goals of the Anacortes Maritime Strategy described in the letter? Do you feel this are appropriate goals? Are there other big-picture issues you might suggest? Which goal(s) do you feel are relevant to your business?

14. What advice would you give Port/City/EDASC as we explore this industry and seek ways address obstacles and explore opportunities?


Strengths
Long history of maritime industry
Diverse industry - manufacturing, commercial, retail, services, tourism
Desirable community/quality of life
Strong support from City, community
Deep-water port
Cost-competitive compared to Seattle
Good mix of facilities and infrastructure
Concentrated access to skilled trades
Preservation of working-class culture
Global destination for education/training
Natural environment/recreation opportunities
Strategic location, proximity to Alaska
Weaknesses
Limited industrial land availability
Lack of affordable housing for workforce
Lack of community boatyard
Infrastructure requiring upgrades
Regulatory and permitting environment that can inhibit businesses
Gap between workforce/employer needs
Marine trades not promoted as a career option in K-12 schools
Lack of community in the maritime business sector
Opportunities
Boat shows and races drawing visitors
Event center and increased amentities attracting new visitors
Increased public access to waterfront
Become center for retrofitting and servicing next-generation Pacific fleet
Become center for green marine (including electric vessels, renewables)
Increased trade/exports, including through accomodating larger vessels
Alaska/Arctic business opportunities
Research, training, makerspace facilities
Threats
Insufficient skilled workforce
Cost of living/housing not affordable
Residential encroachment on industrial lands
Regulatory environment driving business away
Younger people less interested in boating-related activities