

SUPPORTING STATEMENT
U.S. Department of Commerce
National Oceanic & Atmospheric Administration
The Ocean Enterprise: A study of US business activity in ocean measurement,
observation, and forecasting
OMB Control No. 0648-0712

Abstract

This request is for an extension of a currently approved information collection. This quadrennial web-based study updates and expands upon previous survey iterations (2015, 2020, and 2025) to track trendlines, structural shifts, and economic growth within the U.S. Ocean Enterprise business sector. The 2025/2026 instrument incorporates new modules to evaluate the adoption, importance, and application of artificial intelligence and machine learning (AI/ML) across ocean technology, products, and services. The purpose of this collection is to provide NOAA, the U.S. Integrated Ocean Observing System (IOOS) Program Office, and federal policymakers with quantitative data regarding business scale, revenue attribution, U.S. employment, export activity, and the practical utility of public ocean observing systems.

Justification

1. Explain the circumstances that make the collection of information necessary. Identify any legal or administrative requirements that necessitate the collection. Attach a copy of the appropriate section of each statute and regulation mandating or authorizing the collection of information.

The National Oceanic and Atmospheric Administration (NOAA) and the U.S. Integrated Ocean Observing System (IOOS) Office execute their mandates pursuant to the statutory authority conferred by the Integrated Coastal and Ocean Observation System (ICOOS) Act of 2009 (33 U.S.C. §§ 3601–3610). The statute mandates that NOAA establish, operate, and maintain an integrated national network for ocean, coastal, and Great Lakes observations while actively fostering strategic partnerships with commercial entities, private sector data providers, and regional associations.

The Ocean Enterprise Study comprehensively assesses the scope, scale, and operational dynamics of commercial activities within both commercial and non-profit enterprises supporting ocean measurement, observation, and forecasting. The primary objectives of this assessment are to enhance visibility for this critical enterprise sector, monitor longitudinal trends in its market capacity, and evaluate its operational integration with NOAA and the U.S. IOOS® Program.

Because standard North American Industry Classification System (NAICS) codes lack the granular categorization required to isolate and quantify ocean measurement, observation, and

forecasting activities, direct empirical data collection is imperative to rigorously establish the sector's economic footprint, workforce composition, and operational capabilities.

2. Indicate how, by whom, and for what purpose the information is to be used. Except for a new collection, indicate the actual use the agency has made of the information received from the current collection.

The information collected is used by NOAA leadership, the IOOS Program Office, federal decision-makers, and industry stakeholders to quantify the economic value generated by ocean data infrastructure commercial activity. This information will be collected every 5 years as part of a quinquennial analysis.

The data collected through this information collection encompasses a broad range of operational, financial, and market indicators, including organizational traits, structural attributes, total and U.S.-based employment, revenue numbers and attribution, primary customer segments, product and service types, artificial intelligence and machine learning (AI/ML) usage, export market participation, and specific IOOS engagement metrics. These data are sourced from U.S. Ocean Enterprise and Ocean Economy businesses, sole proprietorships, single- and multi-location companies, subsidiaries, intermediaries, and end-users operating within the ocean measurement, observation, and forecasting sector. The primary collection mechanism is a 100% electronic, web-based survey instrument designed to minimize respondent burden through automated conditional skip logic, piping, branching functionality, and interactive hyperlinked definitions. Ultimately, the purpose of this collection is to allow NOAA, the IOOS Program Office, federal decision-makers, and industry stakeholders to quantify the economic value generated by ocean data infrastructure, assess the scale and revenue trends of the Ocean Enterprise, measure private sector job growth and export capabilities, identify existing technology gaps, and inform strategic public-private partnerships, workforce development, and targeted outreach efforts.

Item #	Requirement	Statute	Regulation	Form #	Needs and Uses
1	Ocean Enterprise Economic Survey	33 U.S.C. § 3601-3610	N/A	Electronic Web Survey	Used by NOAA/IOOS to measure private sector activity, job growth, revenue attribution, export markets, and the commercial utility of federal ocean data.

3. Describe whether, and to what extent, the collection of information involves the use of automated, electronic, mechanical, or other technological collection techniques or other forms of information technology, e.g. permitting electronic submission of responses, and the basis for the decision for adopting this means of collection. Also, describe any consideration of using information technology to reduce burden.

The collection is 100% electronic. The survey instrument uses conditional skip logic, piping, and branching functionality to minimize burden. Respondents only navigate questions relevant to their specific organizational structure (e.g., single vs. multi-location), geographic scope, and IOOS familiarity. Non-qualifying respondents who select "None of the Above" during initial screening exit the survey immediately.

4. Describe efforts to identify duplication. Show specifically why any similar information already available cannot be used or modified for use for the purposes described in Question 2

No other federal agency or private organization collects comprehensive economic, employment, and technology data specifically tailored to the U.S. Ocean Enterprise cluster. Standard federal statistics (such as Bureau of Labor Statistics or Census Bureau datasets) rely on broad NAICS codes that mix ocean-specific technology providers with general manufacturing or engineering services.

5. If the collection of information impacts small businesses or other small entities, describe any methods used to minimize burden.

A significant proportion of respondents within this sector comprise small business entities and sole proprietorships. To mitigate administrative burden, the instrument incorporates the following measures:

- Advanced conditional skip logic automatically bypasses non-applicable modules pertaining to multi-location, multinational, or parent-company operations.
- With the exception of initial screening and routing inquiries, completion of individual survey items remains optional.
- Embedded hyperlinked terminology (e.g., *Provider*, *Intermediary*, *End-User*) is integrated directly within the survey interface, enabling respondents to complete the questionnaire efficiently without consulting external reference documentation.

6. Describe the consequence to Federal program or policy activities if the collection is not conducted or is conducted less frequently, as well as any technical or legal obstacles to reducing burden.

If this collection is not conducted or if its frequency is reduced, NOAA and the U.S. Integrated Ocean Observing System (IOOS) Office will lack crucial, current empirical baseline data needed to measure how public investments in ocean observing systems directly drive private-sector innovation, revenue attribution, export competitiveness, and job creation. Without periodic updates, the agency cannot track long-term longitudinal growth trends, evaluate structural shifts

within the Ocean Enterprise, or determine the degree to which commercial entities integrate with and leverage federal data assets.

Furthermore, the absence of timely data will impair NOAA's ability to meet reporting mandates under the Government Performance and Results Act (GPRA), obscure emerging ocean technology and workforce capability gaps, and severely hinder strategic, data-driven planning for public-private partnerships. Ultimately, federal decision-makers and ocean policy leaders would be unable to accurately articulate the national economic return on investment generated by federal ocean observation infrastructure.

7. Explain any special circumstances that would cause an information collection to be conducted in a manner inconsistent with OMB guidelines.

This collection complies fully with OMB guidelines (5 CFR 1320.5).

- Respondents are not required to report more frequently than annually (this is a quadrennial survey).
- Respondents are given more than 30 days to complete the voluntary submission.
- Respondents are not required to submit any original documentation; it is a web survey.
- Respondents are not required to retain any records of their submission.
- The information collection is not in connection with a statistical survey that is not designed to produce valid and reliable results that can be generalized to the universe of the study.
- No statistical data classification unapproved by OMB is required.
- No confidentiality pledge is required.
- No proprietary trade secrets are requested; all economic metrics are reported at an aggregate level.

8. If applicable, provide a copy and identify the date and page number of publications in the Federal Register of the agency's notice, required by 5 CFR 1320.8 (d), soliciting comments on the information collection prior to submission to OMB. Summarize public comments received in response to that notice and describe actions taken by the agency in response to these comments. Specifically address comments received on cost and hour burden.

A Federal Register Notice published on June 3, 2026, (91 FR 33152) solicited public comment. No public comments were received in response to this notice.

Outreach & Stakeholder Consultations: NOAA consulted with non-NOAA stakeholders, industry representatives, and regional ocean association members to evaluate the clarity of instructions, survey utility, and burden estimates. Feedback confirmed that the electronic skip logic

significantly improved survey flow and minimized time investment.

9. Explain any decision to provide any payment or gift to respondents, other than remuneration of contractors or grantees.

No payments, incentives, or gifts are offered or provided to respondents for participating in this voluntary collection.

10. Describe any assurance of confidentiality provided to respondents and the basis for the assurance in statute, regulation, or agency policy. If the collection requires a system of records notice (SORN) or privacy impact assessment (PIA), those should be cited and described here.

Section 402(b) of the Magnuson-Stevens Fishery Conservation and Management Act and general Commerce data protection protocols apply where relevant. The introductory screen explicitly states that all survey responses will be kept strictly confidential. Data will be analyzed and published only in aggregated formats so no individual company's financial or operational metrics can be identified.

Consistent with OMB's guidance implementing the Privacy Act of 1974, "an agency record-keeping system on firms it regulates may contain "records" (i.e., personal information) about officers of the firm incident to evaluating the firm's performance. Even though these are clearly "records" under the "control of" an agency, they would not be considered part of a system as defined by the Act unless the agency accessed them by reference to a personal identifier (name, etc.). That is, if these hypothetical "records" are never retrieved except by reference to company identifier or some other nonpersonal indexing scheme (e.g., type of firm) they are not a part of a system of records." NOAA believes that this guidance speaks directly to this scenario and suggests that while the information system certainly will collect and maintain personally identifiable information (PII), they are not maintained in a system of records.

11. Provide additional justification for any questions of a sensitive nature, such as sexual behavior or attitudes, religious beliefs, and other matters that are commonly considered private. This justification should include the reasons why the agency considers the questions necessary, the specific uses to be made of the information, the explanation to be given to persons from whom the information is requested, and any steps to be taken to obtain their consent.

No questions of a sensitive nature (e.g., personal religious beliefs, sexual orientation, or personal Social Security Numbers) are included in this survey instrument.

12. Provide estimates of the hour burden of the collection of information.

Information Collection	Type of Respondent	# of Respondents / year (a)	Annual # of Responses / Respondent (b)	Total # of Annual Responses (c) = (a) x (b)	Burden Hrs / Response (d)	Total Annual Burden Hrs (e) = (c) x (d)	Hourly Wage Rate (f)*	Total Annual Wage Burden Costs (g) = (e) x (f)
Ocean Enterprise Survey	Corporate Executive / Manager	250	1	250	0.40 (24 min)	100	\$69.84	\$6,984
Totals		250		250		100		\$6,984

*Hourly wage rates estimated using BLS Occupational Employment Statistics (e.g., Management Occupations code 11-0000).

13. Provide an estimate for the total annual cost burden to respondents or record keepers resulting from the collection of information. (Do not include the cost of any hour burden already reflected on the burden worksheet).

There are no capital, start-up, or ongoing operation/maintenance costs associated with this information collection. All information is submitted electronically.

14. Provide estimates of annualized cost to the Federal government. Also, provide a description of the method used to estimate cost, which should include quantification of hours, operational expenses (such as equipment, overhead, printing, and support staff), and any other expense that would not have been incurred without this collection of information.

Federal costs involve oversight, contractor administration for web hosting, data aggregation, and final report publication.

OPM's General Schedule (GS) pay table¹ for the Rest of U.S. locality rates were used to determine the base salary. The Rest of U.S. locality was used since NOAA staff are geographically dispersed. Step 5 was used as the base salary and a multiplier of 1.5 was used to calculate the loaded salary.

Cost Descriptions	Grade/Step or Role	Loaded Salary / Cost	% of Effort	Total Cost to Government
Federal Oversight	GS-14/Step 5	\$213,824	10%	\$21,382
Contractor Support (Web Survey & Analysis)	Contractor	N/A	Fixed Cost	\$130,000
TOTAL				\$151,382

¹ <https://www.opm.gov/policy-data-oversight/pay-leave/salaries-wages/salary-tables/pdf/2026/RUS.pdf>

15. Explain the reasons for any program changes or adjustments reported in ROCIS.

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Adjustments: Small revisions in burden hours account for the addition of Section 8 AI/ML questions and streamlined skip logic pathways. Additionally, the number of respondents decreased as NOAA anticipates utilizing automated public data to collect information.

Information Collection	Respondents		Responses		Burden Hours		Reason for change or adjustment
	Current Renewal / Revision	Previous Renewal / Revision	Current Renewal / Revision	Previous Renewal / Revision	Current Renewal / Revision	Previous Renewal / Revision	
Ocean Enterprise Survey	250	315	250	315	100	158	
Total for Collection	250	315	250	315	100	158	
Difference	-65		-65 (adjustment)		-58 (adjustment)		

16. For collections of information whose results will be published, outline plans for tabulation and publication. Address any complex analytical techniques that will be used. Provide the time schedule for the entire project, including beginning and ending dates of the collection of information, completion of report, publication dates, and other actions.

Collected data will be aggregated and analyzed to produce a public report detailing the scope, scale, and workforce trends of the U.S. Ocean Enterprise. Data collection takes place over a 3 to 6-month period, followed by 3 months of analysis and report generation.

It is anticipated that the information collected will be disseminated to the public or used to support publicly disseminated information. NOAA will retain control over the information and safeguard it from improper access, modification, and destruction, consistent with NOAA standards for confidentiality, privacy, and electronic information. See response to Question 10 of this Supporting Statement for more information on confidentiality and privacy. The information collection is designed to yield data that meet all applicable information quality guidelines. Prior to dissemination, the information will be subjected to quality control measures and a pre-dissemination review pursuant to Section 515 of Public Law 106-554.

17. If seeking approval to not display the expiration date for OMB approval of the information collection, explain the reasons that display would be inappropriate.

The agency plans to display the expiration date for OMB approval of the information collection on all instruments.

18. Explain each exception to the certification statement identified in "Certification for Paperwork Reduction Act Submissions."

The agency certifies compliance with 5 CFR 1320.9 and the related provisions of 5 CFR 1320.8(b)(3) without exception.