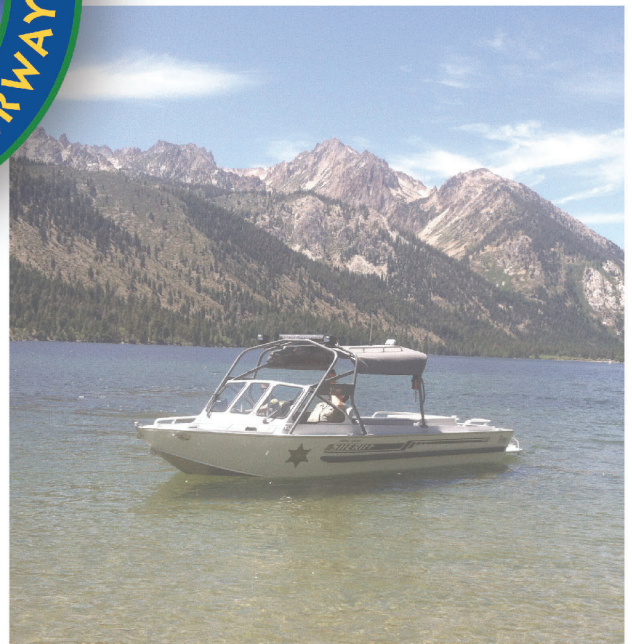


CALIFORNIA BOATING FACILITIES NEEDS ASSESSMENT

2019



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CBFNA

VOLUME I



INTRODUCTION

CALIFORNIA BOATING FACILITIES NEEDS ASSESSMENT



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California Natural Resources Agency

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SACRAMENTO STATE

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Introduction

Volume I: Introduction is designed to provide a brief background of the Division of Boating and Waterways, previous facility needs assessments, and objectives of this *Boating Facilities Needs Assessment*. How this report is organized and ways its findings could be used are also summarized.

The power of public lands and waterways in the State of California and their centrality to the state's outdoor recreation economy is highly significant. As part of California's identity, oceans and beaches, rivers and lakes, as well as boats and waterfronts play a central role in what identifies the state as an attractive place to live and vacation. The state's diverse water resources also contribute centrally to a major tourism economy unmatched by any other state. Indeed, recent indicators point to outdoor recreation being one of the state's largest industries, contributing to \$92 billion in consumer spending and \$6.2 billion in state and local tax revenue (Outdoor Industry Association, 2018). The National Marine Manufacturer's Association asserts that in 2016 California's recreational boating industry had an economic impact of \$8.9 billion, directly or indirectly supporting over 48,000 jobs and over 3,000 businesses in the state (NMMA, 2017).

This *California Boating Facilities Needs Assessment (CBFNA)* encompasses boating-related facilities involved with California waterways where boaters recreate, as well as information related to the current boating population in the state. It is the product of a multi-year research effort analyzing boating facilities and boaters throughout the state, representing a comprehensive view of facilities along waterways, as well as motorized and non-motorized watercraft use and users. Perspectives from boating-involved law enforcement entities and managers of boating facilities throughout the state are also incorporated. Information from a facilities needs assessment improves the Division of Boating and Waterways' ability to strategize and forecast budgetary adjustments that protect the Harbors and Watercraft Revolving Fund balance.¹

The project was conducted for the California Department of Parks and Recreation's Division of Boating and Waterways (DBW) by faculty and graduate researchers at California State University, Sacramento. This study includes a broad, statewide view of recreational boating throughout California, but also focuses on specific waterways, facilities, and boaters in seven State Park planning regions of the state: Northern California, Sierra, Central Valley, Greater San Francisco Bay Area, Central Coast, Los Angeles, and Southern California.

¹ *The purpose of the Harbors and Watercraft Revolving Fund is to finance the activities of the DBW in administering the programs specified in the Harbors and Navigation Code, the Department of Parks and Recreation for operation and maintenance of units of the state park system that have boating-related activities, the State Water Resources Control Board for boating-related water quality regulatory activities, as well as the Department of Fish and Game and the Department of Food and Agriculture for activities addressing the boating-related spread of invasive species (State of California Dept. of Finance, 2013).*



Background

Division of Boating and Waterways

Serving California boaters since 1957, the mission of the DBW aims “to bring together a body of knowledge as the state’s expert in recreational boating-related matters, including public access, safety and education, marine law enforcement, and consumer and environmental protection” (California Department of Parks and Recreation Division of Boating and Waterways, 2018). The primary responsibilities for DBW rest in a program of planning, development, and improvement of boating facilities on state-owned and managed properties, but it also provides funding for local agencies to renew deteriorated facilities and resources to develop additional public access.

With an extensive mandate to plan, design, renovate, and construct recreational boating facilities for safe public access in California, DBW handles a variety of programs to fulfill its mission. The Capital Outlay Program facilitates the planning, design, renovation, and construction involved in small craft harbors, marinas, launch ramps, and facilities for both motorized and non-motorized boats, ramp extensions for low water levels, boat-in sites, and funding for emergency repairs. DBW’s Facilities Division plans, develops, and funds boating facilities where greatest needs exist. The facility grants and loans program offers funding to qualifying public agencies to pay for facilities such as boat launching ramps, boarding floats, and associated parking areas, restrooms, and lighting for motorized and non-motorized boaters. Additionally, loans can be made to qualifying public and private entities to pay for marina improvements.

Previous Boating Facilities Needs Assessments

The last *California Boating Facilities Needs Assessment* was conducted in 2000-2001 with a final report released in 2002. A separate non-motorized boating study was published in 2009. Boating facilities needs assessments have been conducted previously by DBW about every 10 years. While the content of these assessments has varied slightly over the years, the primary purpose has been to support management decision making, particularly the boating facilities grants programs. Initially, the *California Boating Facilities Inventory and Demand Study* was conducted in 1995, and this report contained an inventory of boating facilities, a review of boat ownership trends, a demand analysis for boating facilities for 1995-2010, as well as a capital funding needs assessment.

The five-volume *Boating Facilities Needs Assessment* completed in 2002 focused on similar objectives. That assessment included an updated inventory and status report on boating facilities and waterways throughout California, regional assessments of boating facilities, a survey of motorized boaters, a survey of boating law enforcement officers, and information from a series of public workshops for the public to voice concerns and interests. The 2002 document also had recommendations for improvements to the division’s loan and grant programs, policies, and procedures. A section of the assessment also attempted to calculate the economic impact of recreational boating activity in the state. As well, that effort also aimed to develop boating and facility demand projections through 2020.



Current California Boating Facilities Needs Assessment

Goals and Objectives

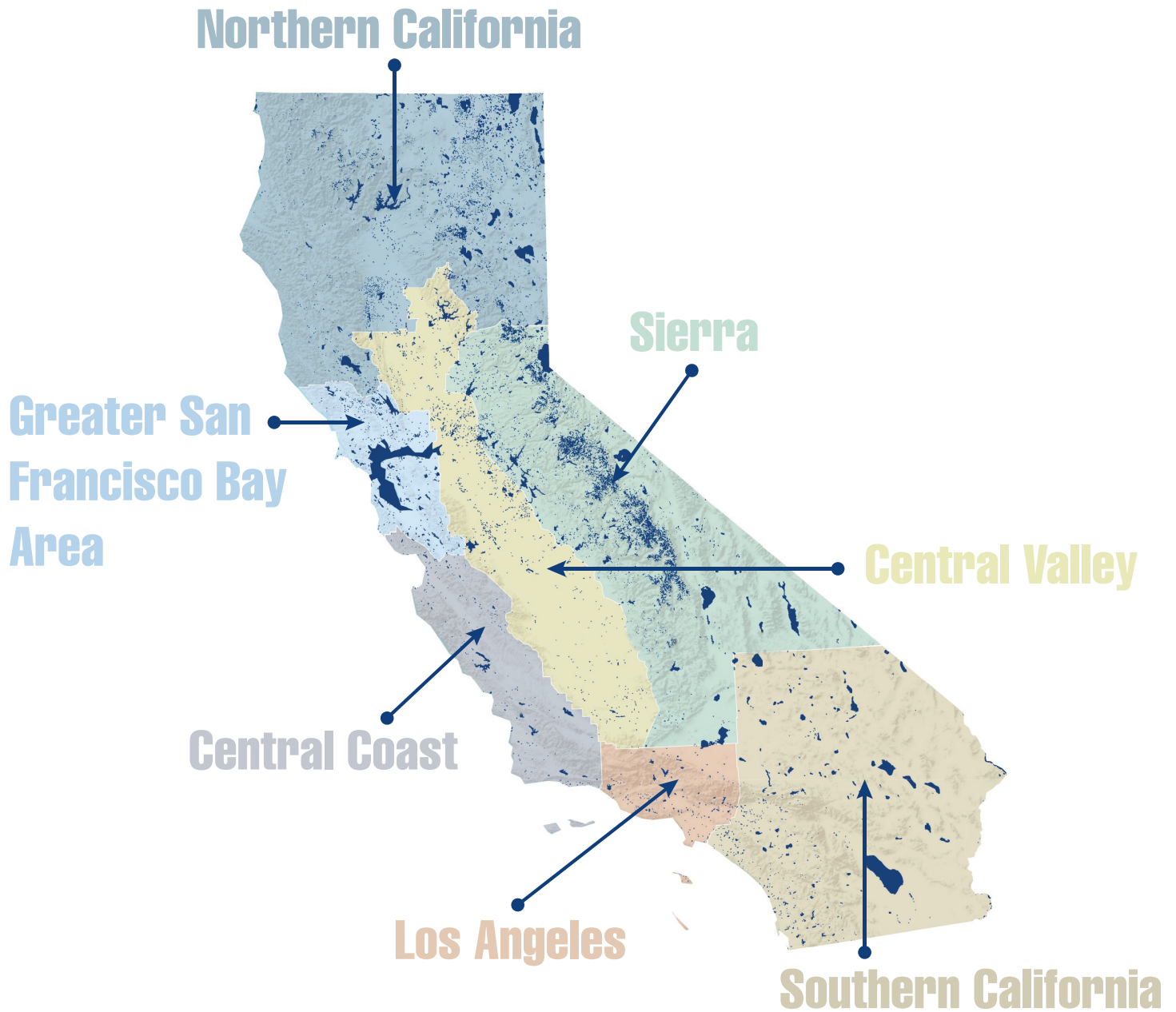
This facilities needs assessment had multiple goals and objectives which were developed to assist DBW in its planning efforts. This analysis developed in stages, beginning initially with a focus on motorized boating and then expanding to include non-motorized boating. The eventual objectives of the present *Boating Facilities Needs Assessment* are described below.

1. Analyze boating needs for the different regions based on data collected from motorized boater, non-motorized boater, facilities, and law enforcement surveys;
2. Generate unit day value(s) for boating in California by applying well-accepted approaches to data collected from motorized and non-motorized boater surveys;
3. Update boating facilities database of California's boating facilities, including marinas, launch ramps, dry storage facilities, mooring fields and other facilities such as yacht clubs and aquatic centers;
4. Generate registered motorized boat ownership forecasts using data from the DMV and USCG (when possible) and characterize motorized boating trends based on these forecasts;
5. Characterize non-motorized boating trends based on the 2009 Non-motorized Boating Report as well as relevant industry publications such as the Outdoor Industry Association annual reports;
6. Calculate local and visitor spending patterns for both motorized and non-motorized recreational boaters;
7. Review current cost-benefit analysis model used by DBW and provide recommendations to strengthen the model for the purpose of providing justification for supporting a waterway financially; and
8. Provide recommendations for future Boating Facilities Needs Assessments.



California Boating Regions

For this facilities needs analysis, the State of California was divided into seven different regions similar to the ones outlined in the *Outdoor Recreation Planning Program* (California State Parks, 2013). Recognizing regional difference and county governance, the planning efforts of State Parks have utilized similar sub-regions of the state since the 1970s in an effort to provide more detailed, local perspectives when necessary for resource planning efforts. Slight changes were made for this study's regional boundaries when the characteristics of lakes and rivers were more similar to adjacent regions; for example, where geology or elevation made some of the lakes in the Central Valley Region a better fit with those in the Sierra Region, slight alterations were made.



Organization of the Report

This report is organized into ten volumes with an executive summary.

Executive Summary. A highlight of key findings from various research efforts that comprise this facilities needs assessment.

Volume I: Introduction. A background of the Division of Boating and Waterways, previous assessments, and objectives of this *Boating Facilities Needs Assessment*.

Volume II: Methods. Detailed description of the range of methodologies used in this project, including ones related to data collection and data analysis.

Volume III: Statewide. Summary of findings for the entire state of California resulting from research efforts described in *Volume II: Methods*.

Volumes IV-X: Regions. Presentation of region-specific findings, including data for each distinct waterway in the region.



Using this Report

These volumes present a snapshot of facilities and boaters in California during the period of 2016-2018 when the research was conducted, and should be considered an addition to the visitor use and facility research related to California State Parks, which has a wealth of data on outdoor recreation in the state.

Of particular value to recreation and resource planners, the information presented in this report can be contrasted with previous boating facilities needs assessments and compared to those conducted in the future as boating and waterway use in the state changes and evolves. Current activity levels of motorized and non-motorized boaters indicate changing directions for boating in the state; so with this in mind, future studies should track these changing uses and users to discern if they were a change in course or simply a brief trend.

Other uses of the data provided in this series of documents can be particularly valuable in secondary planning efforts, such as the travel distance estimates provided by motorized boaters in this report's surveys. For example, this type of information can be utilized for environmental policy consultants who become involved when estimates for resource impacts of particular recreational subgroups in California are needed for Environmental Impact Reports.

California's boaters and paddlers comprise a significant portion of the outdoor recreating public in the state in both economic and social terms. This multi-year research effort aims to support planning and management that is data-driven and responsive to their needs. To this end, general findings in the report, along with waterway-specific data, should be considered in decision-making processes.



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