

Appendix C

Active-User Internet Survey

C. Active-User Internet Survey

The non-random, active-user internet survey was conducted between December 13, 2006, and February 16, 2007.

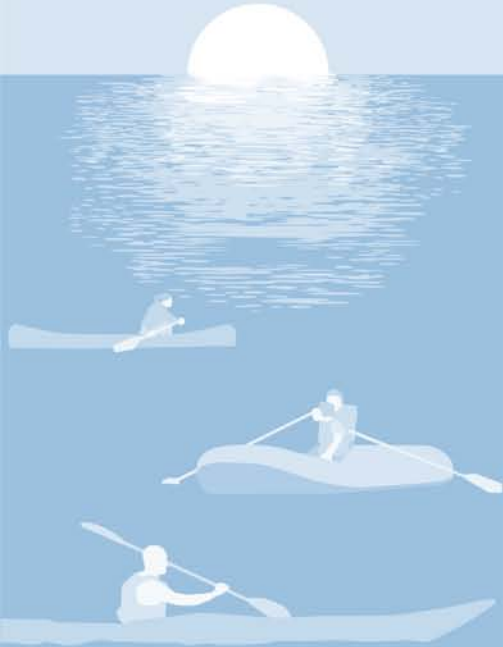
This Appendix includes:

- A description of the active-user Internet survey approach
- A printed copy of the web-based survey instrument (**Exhibit C.1**)
- A sample email to non-motorized boating clubs to inform them of the survey (**Exhibit C.2**)
- A summary of fourteen survey question responses (**Exhibit C.3**).

The active-user Internet survey instrument was essentially identical to the Statewide Random Survey. The only changes were to remove the screening question, add a background/description, and revise the first two questions to allow for those that regularly use, but do not own, non-motorized boats.

DBW placed a link to the active user survey on the front of DBW's web page, www.dbw.ca.gov, on December 12, 2006, until February 16, 2007. Starting on December 13, 2006, NewPoint Group emailed non-motorized boating clubs and organizations throughout the State to introduce the survey and to ask them to inform their members about the survey. Organizations were also told that members that were not online could contact NewPoint Group to obtain a paper-copy of the survey. NewPoint Group also informed several involved individuals, and two web pages related to whitewater boating: dreamflows.com and TheAmericanRiver.com. We contacted the following organizations regarding the active user survey:

- Bay Area Sea Kayakers
- California Dragon Boat Association and local dragon boat clubs
- California Kayak Friends
- Chico Paddleheads
- Explore North Coast
- Full Sail Windsports Club
- International Naples Sabot Association
- Kern Valley River Council
- Norcal Kayak Anglers
- Northern California Outrigger Canoe Association and Northern California outrigger clubs
- Richmond Plungers
- Rio Vista Windsurf Association



- River City Paddlers
- River Touring Section, Los Angeles Sierra Club
- San Diego Kayak Club
- San Diego Windsurfing Association
- San Francisco Board Sailing Association
- San Francisco Sierra Club River Touring Section
- Sequoia Paddling Club
- Shasta Paddlers
- Southern California Kiteboarding Association
- Southern California Outrigger Racing Association and Southern California outrigger clubs
- Southern California Surf Kayakers
- The El Toro International Yacht Racing Association
- US Rowing and California rowing clubs
- Valley Wide Kayak Club
- Western Sea Kayakers.

The survey link was posted on several organizations web pages and non-motorized boating listserves. Club representatives from a number of clubs contacted NewPoint Group to clarify the intent of the survey and to obtain additional information prior to informing their members.

The active-user survey was designed to allow easy click or fill-in responses, and a one-click submission. Completed answers were sent in an anonymous email to NewPoint Group. We imported each survey response into a master Excel file, with one row per survey response. As surveys were processed, we removed duplicates and partially completed surveys (which occurred if the respondent submitted the survey before completing it, or submitted the survey more than once).

There were a total of 1,518 completed surveys. The vast majority of respondents, 1,481, were from within California. An additional 37 respondents were from out-of-state, but boated in California. Most (1,400) respondents owned one or more non-motorized boats; however, there were 118 respondents that regularly participated in boating, but used club-owned or rental boats.

The statewide random telephone survey and the active-user Internet survey were two very distinct, and incomparable, surveys. The statewide random telephone survey represented a random sampling of California households. Because this was a random survey of households statewide, we could extrapolate results to the California population overall, with a given level of statistical accuracy. This was not the case with the active-user Internet survey.

The active-user survey was a self-selected sample of active and interested boaters. Only boaters that were informed about the survey through clubs, non-motorized boating list servers, and other boaters, or that may have “happened across the survey” on DBW’s web page, participated. Also, among the thousands of non-motorized boaters that were made aware of the survey, only a subset of them completed the survey.

The types of boats represented in the active-user survey were shaped by the clubs and user-groups that were most heavily represented in the active-user survey: sea kayakers, whitewater boaters, sailboarders, and rowers. For example, nine (9) percent of active user respondents used sailboards as their most-used boat. This was clearly far higher than the actual percentage of Californian’s that used sailboards in 2006. The active-user respondents that owned inflatable boats were generally a subset of whitewater boaters that participated in the survey, and that were whitewater rafters, rather than whitewater kayakers. This active-user response reflected only a small subset of the types of inflatable boating among statewide random telephone survey respondents.

We included the active-user survey in our study because we wanted to identify the characteristics, and perspectives, of the most involved (enthusiastic) subset of the non-motorized boating public. While this subset may include many of the types of boaters one sees most often on many of California waterways, it does **not** represent the typical California non-motorized boat **owner**.

In total, while these active-user surveys are not statistically representative of the California population of non-motorized boaters, they do provide a robust picture of the perspectives of non-motorized boating enthusiasts. The active-user survey responses were presented to attendees at the special interest group meetings, and were utilized in helping to write Section 3: Facilities and Waterways for Non-Motorized Boating.



Non-Motorized Boating in California

Active-User Survey

Questionnaire

SURVEY BACKGROUND

The California Department of Boating and Waterways (Cal Boating) is conducting its first-ever study of non-motorized boating in California. Cal Boating is a State agency whose mission is to provide safe and convenient access to California's public waterways, and leadership in promoting the public's right to safe, enjoyable, and environmentally sound recreational boating. A major focus for Cal Boating is to provide grants and loans for boating facilities such as launch ramps and marinas. While Cal Boating has supported several non-motorized boating initiatives over the last few years, Cal Boating-funded facilities are typically directed toward motorized boating.

As non-motorized boating activities have become increasingly popular in California and elsewhere, Cal Boating is considering providing more support to this growing boating community. As a first step in further planning and potential support for non-motorized boating, Cal Boating seeks to understand how many non-motorized boaters there are in California, the boats they own, and where and why they boat.

The results of this study will be used to help the Department to (1) understand how many, and what types, of non-motorized boats there are in California, (2) understand how economically important non-motorized boating is to California, and (3) plan future facilities to meet the needs of non-motorized boaters. This study is **not** associated with California Department of Motor Vehicles boat registration enforcement.

Relatively little is known either nationally, or within California, about non-motorized boats and boating, and we need non-motorized boaters' input. As part of the overall non-motorized boating study, we are conducting this "active-user" Internet Survey of non-motorized boaters. Those who boat regularly will have a better awareness of facility needs, will spend the most money on boating, and will have the best perspectives on how to improve non-motorized boating in California.

If you have one or more non-motorized boats, as defined below in question #1, please take the time (about 15 to 20 minutes) to complete and submit this active-user survey. All of your responses will be kept strictly confidential, and will only be presented in the aggregate form, together with other responses. The results of this study will be available in late 2007 at the California Department of Boating and Waterways web page, www.dbw.ca.gov.

Special note for non-motorized boating participants who do not own a boat (for example, members of outrigger canoe clubs, rowing clubs, and dragon boat clubs): Even though you do not own a particular type of non-motorized boat, we are interested in your opinions and expenditures on non-motorized boating. Please complete the survey. For those boat type(s) that you regularly use, but do not own, check the specific boat type in Question #2, but put a zero for the number of boats. Answer the remaining questions for the non-motorized boat types that you use most often, even if you do not own them.

We value your time and thank you very much for your assistance in this important study. If you have questions about the survey, please contact Wendy Pratt at wendypratt@newpointgroup.com.

Directions and clarifications are provided in bold type.

USER SURVEY

1. There are many kinds of non-motorized boats, and we are interested in identifying specific types of boats you, or someone in your household, **currently owns**. *Our definition of non-motorized boats means any boat **not** currently registered with a vessel registration (CF) number from the California Department of Motor Vehicles. This non-motorized boat definition includes: (1) boats propelled by paddles or oars, and usually without a motor, such as canoes, kayaks, inflatable boats and rafts, rowing boats (including row boats, shells, sculls, dories, or driftboats), and other types of manually propelled boats; (2) sailboats 8 feet in length or shorter, and usually without a motor; and (3) sailboards or kiteboards. Non-motorized boats **do not** include "toy like" blow-up rafts and other non-durable water toys.* Do you or anyone in your household, own one or more of the following non-motorized boats, within this definition?

(Indicate all that apply)

- A. Canoe
- B. Kayak
- C. Inflatable Boat or Raft
- D. Small Sailboat (8 feet in length or shorter)
- E. Rowing Boat (including row boat, shell, scull, dory, or driftboat)
- F. Sailboard or Kiteboard
- G. Other type of non-motorized boat
- H. I don't own a non-motorized boat, but I regularly participate in non-motorized boating through a club or other organization.

If you do not own, or regularly use, a non-motorized boat, you do not need to complete the remainder of this survey.

Complete question #2 for each category of non-motorized boat that you indicated above. If the specific type of non-motorized boat that you own is not identified, please fill in the appropriate "Other" entry.

2. Please identify the specific type of non-motorized boat, and how many of that type of boat that you, or someone in your household, owns.

(Indicate all that apply)

A. Canoes

- Hard-shell canoe – How many?
- Inflatable canoe – How many?
- Other specialty canoes:
 - Hunting – How many?
 - Fishing – How many?
 - Outrigger – How many?
 - Whitewater – How many?
 - Other: – How many?

B. Kayaks

- Recreational (flat-top plastic) kayak – How many?
- Inflatable kayak – How many?
- Whitewater kayak – How many?
- Sea or touring kayak – How many?
- Other specialty kayaks:
 - Fishing kayak – How many?
 - Sailing kayak – How many?
 - Surfski – How many?
 - Surf kayak – How many?
 - Scuba kayak – How many?
 - Folding kayak – How many?
 - Other: – How many?

C. Inflatable Boats and Rafts

- Inflatable raft – How many?
- Inflatable cataraft – How many?
- Inflatable transom boat or tender – How many?
- Other inflatable boat: – How many?

D. Sailboats

- Small sailboat (8 feet or shorter, such as an “El Toro”) – How many?

E. Rowing Boats

- Rowing shell or scull – How many?
- Row boat/dory/driftboat/tender – How many?

F. Sailboard/Kiteboard

- Sailboard – How many?
- Kiteboard – How many?

G. Other Non-Motorized Boats

- Dragon boat – How many?
- Paddle/peddle boat – How many?
- Other non-motorized boat: – How many?

3. Did you use your non-motorized boat (or boats) in the last five years?

- Yes
- No

(If “no”, please skip to question #39)

Answer question #4 if, from question #2, you own more than one type of non-motorized boat. If you own only one type of non-motorized boat, skip to question #5.

4. If you own more than one type of non-motorized boat, which boat type do you use most often? (for example, “whitewater kayak” or “rowboat”)

If you have multiple non-motorized boats, answer questions #5 to #15 for the one type of non-motorized boat that you use most often.

5. How many years have you owned this type of non-motorized boat?

6. How many days a year do you typically use this type of non-motorized boat?

7. On what waterway do you use your non-motorized boat most often?

8. Please indicate any of the following that best describe why you used your non-motorized boat at this waterway:

(Indicate all that apply)

- Close to home, or convenient access
- Facilities (parking, restrooms, day-use, camping)
- Water and/or flow conditions (for example: rapids, wave conditions, wind conditions, reliable water flows, calm water, variety, clean water, etc.)
- Not crowded
- Visiting location for another reason (sightseeing, hiking, biking, camping, vacation, etc.)
- Access to another activity (hunting, fishing, scuba/snorkeling, birdwatching, etc.)
- Features or destinations (beach, shoreline, amenities, boating trails)
- Other:

9. Are there improvements or facility needs that would support non-motorized boating at this waterway?

Examples of facility needs include restrooms, parking, signage, boating trails, storage, etc.

- Yes
- No

(If "no", please skip to question #11)

10. If yes, what are they?

(Indicate all that apply)

- Improved access to water
- Maintain water level/water releases
- Parking
- Restrooms
- Showers
- Freshwater boat wash
- Low-impact facilities
- Boating trails
- Docks
- Floats/launch ramps
- Beach area
- Storage
- Signage
- Improved water quality
- Picnic areas
- Camping
- Motor-boat free zones
- Whitewater park
- Other:

11. Is there a second waterway where you use your non-motorized boat?

- Yes
- No

(If "no", please skip to question #16)

12. If yes, what is the name of that waterway?

13. Why do you boat at this second waterway?

(Identify up to three reasons)

- 1.
- 2.
- 3.

14. Are there improvements or facility needs that would support non-motorized boating at this second waterway?

- Yes
- No

(If "no", please skip to question #16)

15. If yes, what are they?

(Identify up to three improvements or facility needs)

- 1.
- 2.
- 3.

16. Is there a California waterway that you avoid using, or would use more often, except that there are problems or facility needs at the waterway?

- Yes
- No

(If "no", please skip to question #19)

17. If yes, what is the name of that waterway?

18. If yes, please identify the problems or facility needs at that waterway:

(Indicate all that apply)

- Lack of access for non-motorized boats
- Overcrowding
- Inconsistent water flows and/or problems related to dam releases
- Inadequate parking
- Lack of or inadequate restrooms
- Water conditions (water quality, obstructions, rapids, currents, low water levels, floating debris, etc.)
- Reckless boaters
- Other:

Answer questions #19 to #24 only if you have more than one type of non-motorized boat, as identified in question #2. For example, if you have a sea kayak and a whitewater kayak, this would count as two types of boats. If you have six whitewater kayaks, this counts as only one type of boat. If you have only one type of boat, skip to question #25.

19. What is the non-motorized boat type, from question #2, that you use the second most often?

20. How many years have you owned this second type of non-motorized boat?

21. How many days a year do you typically use this second type of non-motorized boat?

If you own a third type of non-motorized boat, answer questions #22 to #24, if not, skip to question #25.

22. If you have more than two non-motorized boat types, from question #2, what is the non-motorized boat type that you use the third most often?

23. How many years have you owned this third type of non-motorized boat?

24. How many days per year do you typically use this third type of non-motorized boat?

25. There are many reasons why people use non-motorized boats. Please indicate the reason (or multiple reasons) why you participate in non-motorized boating.

(Indicate all that apply)

- Recreation
- Leisure and relaxation
- As a social activity
- As a family activity
- For the physical and/or mental challenge
- For fitness
- For competition
- To enjoy nature
- To participate in another activity such as fishing, hunting, snorkeling, or scuba diving
- Other:

26. Do you have safety concerns related to non-motorized boating?

- Yes
- No

(If "no", please skip to question #28)

27. If yes, what are they?

(Indicate all that apply)

- Interactions with motorized vessels
- Inexperienced or unprepared boaters
- Problems related to overcrowding
- Boating in unsafe water conditions (rapids, waves, rocks, debris, unpredictable flows, tides, currents, cold water, high water, cold water)
- Boating in unsafe weather conditions (wind, cold, heat, lightning)
- Boaters not using PFDs (personal floatation devices)
- Using unsafe boats or equipment (ropes, paddles, improper boat, no helmet)
- Waterborne illness/poor water quality
- Other safety concerns:

28. This question relates to annual spending for durable goods and services related to non-motorized boating, **not including boating trips**. In the last 12 months, how much have you, and your household, spent on non-motorized boating equipment, supplies and services, for each of the following categories:

(Provide your best estimate)

- \$ New boats
- \$ Used boats
- \$ Repairs
- \$ Boating supplies and equipment (racks, paddles, PFDs, ropes, parts, pumps, bags, sails, carts, helmets, etc.)
- \$ Other gear (apparel, footwear, accessories)
- \$ Memberships
- \$ Classes, instruction, events
- \$ Books, magazines, videos, DVDs
- \$ Other annual expenses:

The next several questions are about your most recent non-motorized boating trip in California, within the last five years. This could be a one-day outing, or a several-day trip.

29. First, what is the name of the waterway that you went to on your most recent trip?

30. If you have more than one type of non-motorized boat, from question #2, which boat type did you use on this trip?

31. Was non-motorized boating the primary purpose of this trip?
 Yes
 No
(If "yes", please skip to question #34)

32. If no, what was the primary purpose of this trip? **(Indicate one)**
 Camping
 Motorized boating activity
 Hiking or biking
 Fishing or hunting
 Sightseeing
 Participating in another event (family gathering, vacation, business, sporting event)
 Other:

33. If no, what percent of your activity time (excluding travel) was spent on non-motorized boating?

34. How many days was this trip?

35. How many hours one-way did it take you to travel to your destination?

36. How many miles one-way from your home is this destination?

37. How many people traveled with you, in your immediate group, on this trip?

38. For this most recent non-motorized boating trip, how much did you and your immediate traveling group spend for the following categories:
(Provide your best estimate)

\$ Fuel

\$ Parking

\$ Entrance and/or launch fees

\$ Shuttle services

\$ Grocery and convenience stores

\$ Retail, gift, specialty, or other stores

\$ Restaurants

\$ Motels/hotels

\$ Campgrounds

\$ Other:

39. How many years have you been involved in some form of non-motorized boating?

- Less than 5 years
- 5 to 9 years
- 10 to 14 years
- 15 to 20 years
- More than 20 years

40. In the next five years, how many days per year do you think you will participate in non-motorized boating, as compared to the last five years? **(If “a lot more” or “a little more”, answer question #41, then go to question #43; if “a lot less” or “a little less”, skip to question #42; if “about the same”, skip to question #43)**

- A lot more
- A little more
- About the same
- A little less
- A lot less

41. If you answered a lot more, or a little more, why will you be increasing your participation?

(Indicate all that apply)

- More free time
- Enjoy the activity
- Non-motorized boating is replacing another hobby/activity
- As a social activity/my friends are doing it
- As a family activity/my family is doing it
- My skill level has improved
- To try new types of non-motorized boating
- Other:

42. If you answered a lot less, or a little less, why will you decrease participation?

(Indicate all that apply)

- Not enough time
- No longer interested
- Lack of access to an appropriate waterway
- Lack of facilities or inadequate facilities
- Logistics make it too difficult
- Expense
- Health/illness/injury
- Too crowded
- Other:

43. Are you a member of any non-motorized boating clubs or organizations?

- Yes
- No

(If “no”, please skip to question #45)

44. If yes, please list all the non-motorized boating organizations or clubs that you belong to: **(Identify up to five organizations or clubs)**

1.

2.

3.

4.

5.

The last several questions will help us understand who participates in non-motorized boating activities. Remember, your answers are confidential, and will only be presented in aggregate form.

45. What is your age?

- Under 18
- 18-25
- 25-34
- 35-44
- 45-55
- 56-65
- Over 65

46. What is your zip code?

47. What is your gender?

- Male
- Female

48. What is your marital status?

- Single
- Married

49. How many people are in your household?

50. How many people in your household participate in non-motorized boating?

51. What is your ethnicity?

- Caucasian
- Black
- Latin
- Native American
- Asian
- Other

52. What level of education have you completed?

- High school
- Some college
- B.A. or equivalent
- Advanced degree (MS, MA, PhD, MD, JD, etc.)

53. What was your household's combined income for 2005?

- Under \$25,000
- \$25,000 up to \$50,000
- Over \$50,000 up to \$100,000
- Over \$100,000 up to \$200,000
- Over \$200,000

54. Please provide any additional comments or suggestions related to non-motorized boating or non-motorized boating facilities in California:

Comments?

Thank you for your participation!

Click here to submit survey

Exhibit C.2

A Sample Email To Non-Motorized Boating Clubs To Inform Them Of The Survey (2006)

Dear [Club Representative] -- I am working on a project for the California Department of Boating and Waterways (DBW) non-motorized boating in California. As a first step in further planning and potential support for non-motorized boating, DBW seeks to understand how many non-motorized boaters there are in California, the boats they own, and where and why they boat. Another important component of the project is to determine the economic impact of non-motorized boating in California. As part of the overall non-motorized boating study, we are conducting an "active-user" survey of non-motorized boaters. The survey is now online at the DBW web page, <http://www.dbw.ca.gov> - the link to the survey is in the middle of the page.

Please let all of your [club] members know about the survey - we would like to get input from as many non-motorized boaters as possible. Also, if you have members that are not online, but that would like to do the survey, have them contact me, and I will mail them a paper copy.

If you have any questions, please feel free to contact me.

Thank you,

Wendy Pratt

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Exhibit C.3
Summary of Active-User Survey Respondents (2006) (n=1,518)

Boater Gender	
Males	68%
Females	28%
NA	4%
100%	

Boater Marital Status	
Married	57%
Single	38%
NA	5%
100%	

Used a Boat in Last 5 Years?	
Yes	99%
No	1%

Education	Percent
High School	2%
Some College	17%
BA or Equivalent	38%
Advanced Degree	39%
NA	4%
100%	

Number of Boats Owned	
0	8%
1	15%
2	16%
3 to 4	24%
5 to 6	17%
7 to 10	14%
11 to 15	5%
16 or more	2%
100%	
Average	4.5 boats
Median	3 boats

Years Owned Most-Used Non-Motorized Boat	
1 to 2	21%
3 to 4	22%
5 to 6	17%
7 to 8	11%
9 to 10	13%
11 to 14	4%
15 to 20	7%
Over 20 years	5%
(n=1,409) 100%	
Average	9.5 years
Median	7 years

Number of Boaters in Household
1.8

Age	Percent
Under 18	1%
18 to 24	3%
25 to 34	11%
35 to 44	23%
45 to 55	35%
56 to 65	19%
Over 65	4%
NA	3%
100%	

Ethnicity	Percent
Caucasian	82.4%
Asian	5.5%
Black	0.5%
Latin	1.7%
Native American	0.7%
Other	3.7%
NA	5.5%
100%	

Years Involved in Non-Motorized Boating	
Less than 5 years	17%
5 to 9 years	20%
10 to 14 years	15%
15 to 20 years	13%
Over 20 years	32%
NA	3%
100%	

Days per Year of Non-Motorized Boating	
1 day	2%
2 to 10 days	10%
11 to 20 days	12%
21 to 40 days	22%
41 to 60 days	16%
61 to 80 days	9%
81 to 100 days	8%
101 to 150 days	11%
151 to 200 days	6%
201 to 250 days	2%
251 to 300 days	2%
301 to 365 days	1%
(n=1,506) 100%	
Average	73 days
Median	50 days

Reasons for Participating in Non-Motorized Boating	
Recreation	92%
Physical/mental challenge	82%
To enjoy nature	82%
For fitness	81%
Leisure and relaxation	76%
As a social activity	72%
As a family activity	37%
For competition	33%
Participate in another activity*	18%
Camping	2%
Quiet	2%
Educating others	1%
Non-polluting and no gasoline	1%
Convenient and easy	0.5%
Less expensive	0.4%
As a job	0.3%
Breast cancer survival team	0.2%
Cultural	0.1%
To reach other boat	0.1%
Transportation	0.1%
(n=1,518)	
Sums to over 100 percent because respondents identified multiple reasons.	

Household Income	Percent
Under \$25,000	3%
\$25,000 up to \$50,000	10%
Over \$50,000 up to \$100,000	35%
Over \$100,000 up to \$200,000	34%
Over \$200,000	10%
NA	8%
100%	

Most Used Non-Motorized Boat Type	
Sea/touring kayak	20%
Whitewater kayak	18%
Rowing shell or scull	12%
Sailboard	9%
Inflatable raft	7%
Outrigger canoe	6%
Recreational kayak	5%
Dragon boat	4%
Kiteboard	4%
Fishing kayak	3%
Canoe	3%
Inflatable kayak	2%
Kayak (unspecified)	2%
Surfski	1%
Other kayaks	1%
Whitewater canoe	1%
Cataraft	1%
Row boat	1%
Inflatable other	0.4%
Small sailboat	0.2%
Other boats	0.4%
100%	

* Fishing, hunting, scuba diving, snorkeling, photography, bird-watching, etc.