

Appendix D

Commercial and Institutional Survey

D. Commercial and Institutional Survey

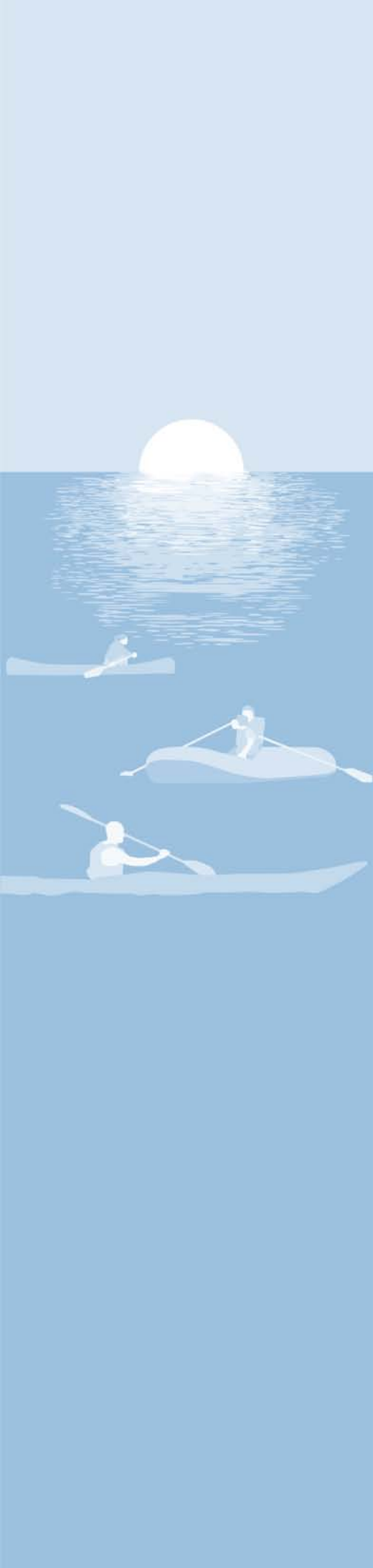
The commercial and institutional survey of organizations involved in non-motorized boating was intended to identify the number and types of non-motorized boats owned by these organizations, as well as the number of participants, and costs of participation. In addition, the survey included several questions about observed trends in non-motorized boating, facility needs, and safety issues. We conducted the survey between November 2006 and May 2007.

This appendix provides a description of the survey approach, and the following:

- **Exhibit D.1**, a paper version of the survey
- **Exhibit D.2**, a summary of the results of eleven survey questions
- **Exhibit D.3**, a summary of participation and expenditure results by region
- **Exhibit D.4**, a summary of boats and boat types
- **Exhibit D.5**, a listing of 243 commercial and institutional entities providing non-motorized boating rental, instruction, and/or guided trips
- **Exhibit D.6**, a summary of commercial whitewater participation on eleven California rivers.

Survey Approach

There were two initial tasks for this survey. The first task was to identify entities to be surveyed, and the second task was to develop the survey instrument. We developed a list of commercial entities that provided non-motorized boating services through directories, Internet research, and lists of outfitters provided by government agencies. DBW provided a list of aquatic centers to be surveyed, many of which offer non-motorized boating activities. We reviewed web pages, and obtained addresses, telephone numbers, and emails for a final list of 243 organizations. We removed many companies that were initially identified on various lists, because they were no longer in business (particularly windsurfing businesses). We removed a number of entities from the lists, because they were retail-only and did not provide non-motorized boating services. The final list of 243 commercial and institutional entities includes the vast majority of all non-motorized boating service providers, and ten (10) yacht clubs that we contacted regarding small sailboats. We incorporated small sailboat information from yacht clubs into club boating results. This overall list is likely missing some small rental businesses.



NewPoint Group implemented the survey by telephone, mail, and email. We contacted all 243 entities multiple times, by both telephone and email. Respondents were given the option of completing the survey over the telephone, or being sent the survey (email or postal mail) to complete and return. We made up to four contacts with entities that did not respond, and had a final response rate of 46 percent, 112 completed surveys. For the 131 entities that did not complete surveys^a, we conducted additional Internet research to identify the region in which

they were located, the type of services they provided (rental, instruction, guided trips), and the average cost of each type of service. These region and service-specific extrapolations are reflected in the participation and expenditure data provided in Exhibit D.3, and used in the economic analysis in Section 4 of this report. Similarly, in Exhibit D.4, the number of boats, by boat type, for commercial and institutional entities, are based on the number of boats by type for the 112 survey respondents, extrapolated to the entire population.

^a Analysis of the survey responses was done confidentially, with no organization identification on the compiled surveys (unless provided by the respondent). However, we separately kept track of which of the 243 entities completed surveys. This allowed us to re-contact those that had not completed surveys, and finally, to research non-respondents so that we could accurately extrapolate participation and expenditures to the full population.

**Non-Motorized Boating in California
Commercial and Institutional Rentals, Instruction, and Guided-Trips Survey
Questionnaire**

BACKGROUND

The California Department of Boating and Waterways (Cal Boating) is conducting its first ever study of non-motorized boating in California.

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 boats and boaters there are in California, the types of non-motorized boats, and where they are used.

The results of this study will be used to help Cal Boating to: (1) understand how economically important non-motorized boating is to California; and (2) potentially ultimately 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. Those businesses and organizations that are involved with non-motorized boating may have a good awareness of facility needs, and perspective on how to improve non-motorized boating in California. In order to determine the number of non-motorized boats in California, and the economic impact of non-motorized boating, we need to know not only about private-owner boating, but also about participation in non-motorized boating rentals, classes, and guided trips. The focus of this survey is to gather information about these three categories of non-motorized boating activities.

As part of this overall study, we are conducting three surveys: (1) a statewide random survey of individuals that own one, or more, non-motorized boats; (2) an Internet survey of active-users of non-motorized boats; and (3) this email and telephone survey of commercial, non-profit, and institutional non-motorized boating service providers.

DIRECTIONS

Please complete this survey if your business or organization provides one or more of the following: (1) rentals, (2) on-the water classes or instruction, and/or (3) guided trips, for any non-motorized boat types, as defined below. If you have multiple office or store locations, please complete a separate survey for each location.

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 late 2007 at the California Department of Boating and Waterways web page, <http://www.dbw.ca.gov>.

The survey is divided into five sections. Everyone should complete SECTIONS 1 and 5. Complete SECTION 2 if you provide rentals, SECTION 3 if you provide on-the-water classes or instruction, and SECTION 4 if you provide guided trips.

For purposes of this study, "non-motorized boat" is defined as: *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, driftboats, and tenders), and other types of manually propelled boats; (2) small sailboats 8 feet in length or shorter (and usually without a motor); and (3) sailboards and kiteboards. Non-motorized boats do not include "toy like" blow-up rafts and other non-durable water toy, nor do non-motorized boats include innertubes or fisherman float tubes. Finally, non-motorized boats do not include normal surfboards, beach boogie boards, or river boards.*

Text boxes will expand to fit your answers. Please **TAB** to the next item when you have completed your answer.

Directions and clarifications are provided in bold type. Thank you in advance for your time. If you have any questions, please call or email Wendy Pratt at (916) 442-9227, or wendypratt@newpointgroup.com.

SECTION 1 – TO BE COMPLETED BY ALL RESPONDENTS

1. Please identify your type of business entity or organization. **(Indicate all that apply)**
 - 1 Commercial business
 - 2 Non-profit organization
 - 3 Institutional organization (school, university)
 - 4 Local government
 - 5 Private boating club
 - 6 Aquatic center
 - 7 Self-employed guide or instructor
 - 8 Other: _____ 9

2. How many years has your business or entity provided services and/or products related to non-motorized boats? _____ 10

3. How many non-motorized boating-related business office or store locations does your entity or organization have in California? _____ 11 **If you have more than one California location, enter the county of one location in question #4, and complete the survey for that location. Please complete a separate survey for each business office or store location.**

4. What is the county in which your business/entity office or store is located? _____ 12

5. Are non-motorized boating-related services or products your primary business or organizational focus?
 - 13 Yes 14 No **(If “yes”, skip to question #7)**

6. If no, what is the primary business or organizational focus? **(Indicate one)**
 - 15 Motorized boats and/or sailboats greater than 8 feet in length
 - 16 Outdoor or retail sporting goods, in general
 - 17 Scuba diving, fishing, or hunting services
 - 18 Boating education
 - 19 Recreational activities, in general
 - 20 Other: *(please specify)* _____ 21

Question #7 will help us identify how many non-motorized boats are in California. Please identify each type of non-motorized boat for which your organization has any number of rental, instructional, or guided-trip boats, and the number of boats of that type. You may use the “Other” category if your specific boat type is not identified.

7. Please identify the specific type of non-motorized boat, and total number of that type of boat in your fleet of rental, instructional, and/or guided-trip non-motorized boats in 2006. Do not include boats within your retail sales inventory (unless they are also used for rental, instruction, or guided trips). **(Indicate all that apply)**

A. Canoes

- 22 Hard-shell canoe – How many? _____ 23
- 24 Inflatable canoe – How many? _____ 25
- 26 Other specialty canoes:
 - 27 Hunting – How many? _____ 28
 - 29 Fishing – How many? _____ 30
 - 31 Outrigger – How many? _____ 32
 - 33 Whitewater – How many? _____ 34
 - 35 Other: _____ 36
– How many? _____ 37

Text boxes will expand to fit your answers. Please TAB to the next item when you have completed your answer.

B. Kayaks

- 38 Recreational kayak – How many? _____ 39
- 40 Sit-on-top kayak – How many? _____ 41
- 42 Inflatable kayak – How many? _____ 43
- 44 Whitewater kayak – How many? _____ 45
- 46 Sea and touring kayak – How many? _____ 47
- 48 Other specialty kayaks:
 - 49 Fishing kayak – How many? _____ 50
 - 51 Sailing kayak – How many? _____ 52
 - 53 Surfski – How many? _____ 54
 - 55 Surf kayak – How many? _____ 56
 - 57 Scuba kayak – How many? _____ 58
 - 59 Folding kayak – How many? _____ 60
 - 61 Racing kayak – How many? _____ 62
 - 63 Other: _____ 64 – How many? _____ 65

C. Inflatable Boats and Rafts

- 66 Inflatable raft – How many? _____ 67
- 68 Inflatable cataraft – How many? _____ 69
- 70 Inflatable transom boat and tender – How many? _____ 71
- 72 Other inflatable boat _____ 73 – How many? _____ 74

D. Sailboats

- 75 Small sailboat (8 feet in length or shorter) – How many? _____ 76

E. Rowing Boats

- 77 Rowing shell or scull – How many? _____ 78
- 79 Row boat/dory/driftboat/tender – How many? _____ 80

F. Sailboard/Kiteboard

- 81 Sailboard – How many? _____ 82
- 83 Kiteboard – How many? _____ 84

G. Other Non-Motorized Boats

- 85 Dragon boat – How many? _____ 86
- 87 Paddle/peddle boat – How many? _____ 88
- 89 Stand-up paddle surfboard – How many? _____ 90
- 91 Other type of non-motorized boat: _____ 92 – How many? _____ 93

8. How often do you typically replace non-motorized boats in your fleet?

- 94 Within 1 year
- 95 Once a year
- 96 Every 2 to 3 years
- 97 Every 4 to 5 years
- 98 After more than 5 years

Text boxes will expand to fit your answers. Please **TAB** to the next item when you have completed your answer.

SECTION 2 – TO BE COMPLETED BY ORGANIZATIONS THAT PROVIDE RENTAL SERVICES FOR NON-MOTORIZED BOATS

RENTALS: If your organization or entity provides rentals of non-motorized boats, answer questions #9 through #13, if not, skip to SECTION 3.

9. If your organization/entity provides rentals for any type of non-motorized boat, please complete the following for each non-motorized boat category that you rent:

Non-Motorized Boat Category	Number of Rental Participants in 2006 (if data are not available for 2006, provide data for 2005)	Average Rental Cost per Participant (in dollars)
A. Canoes	_____ 99	_____ 100
B. Kayaks	_____ 101	_____ 102
C. Inflatable Boats and Rafts	_____ 103	_____ 104
D. Small Sailboats (8 feet in length or shorter)	_____ 105	_____ 106
E. Rowing Boats (including row boat, shell, scull, dory, driftboat, and tender)	_____ 107	_____ 108
F. Sailboards and Kiteboards	_____ 109	_____ 110
G. Other type of non-motorized boats	_____ 111	_____ 112

10. Approximately what percentage of your rental customers rent more than one time per year? (provide your best estimate)

- 113 0 to 25 percent
- 114 26 to 50 percent
- 115 51 to 75 percent
- 116 76 to 100 percent
- 117 Don't know

11. Do you provide on-site rentals for specific waterways? 118 Yes 119 No (If "no", skip to question #13)

12. If yes, please identify the waterways for which you provide rentals. (list all) _____ 120

13. Please briefly describe a typical rental customer. (For example: families, couples, groups or individuals; locals, from out-of-town or out-of-state; novice or experienced, etc.).
_____ 121

Text boxes will expand to fit your answers. Please TAB to the next item when you have completed your answer.

SECTION 3 – TO BE COMPLETED BY ORGANIZATIONS THAT PROVIDE ON-THE-WATER CLASSES AND INSTRUCTION FOR NON-MOTORIZED BOATS

CLASSES AND INSTRUCTION: If your organization or entity provides on-the-water classes or instruction for any type of non-motorized boats, answer questions #14 through #18, if not, skip to SECTION 4.

14. If your organization/entity provides on-the-water classes or instruction for any type of non-motorized boat, please indicate the types of on-the-water classes or instruction provided: **(Indicate all that apply)**

- 122 Beginning-level instruction
- 123 Intermediate-level instruction
- 124 Advanced-level instruction
- 125 Non-motorized boating safety/first aid instruction
- 126 Swift-water rescue
- 127 Instruction for guides and/or instructors
- 128 Private classes
- 129 Other: _____ 130

15. Please complete the following for each non-motorized boat category for which you provide instruction:

Non-Motorized Boat Category	Number of Class Participants in 2006 (if data are not available for 2006, provide data for 2005)	Average Class Cost per Participant (in dollars)
A. Canoes	_____ 131	_____ 132
B. Kayaks	_____ 133	_____ 134
C. Inflatable Boats and Rafts	_____ 135	_____ 136
D. Small Sailboats (8 feet in length or shorter)	_____ 137	_____ 138
E. Rowing Boats (including row boat, shell, scull, dory, driftboat, and tender)	_____ 139	_____ 140
F. Sailboards and Kiteboards	_____ 141	_____ 142
G. Other type of non-motorized boats	_____ 143	_____ 144

16. Approximately what percent of instructional customers participate in more than one class per year? **(provide your best estimate)**

- 145 0 to 25 percent
- 146 26 to 50 percent
- 147 51 to 75 percent
- 148 76 to 100 percent
- 149 Don't know

17. Please list the waterways where you provide classes or instruction. **(list all)** _____ 150

18. Please briefly describe a typical instructional customer. (For example: families, couples, groups or individuals; locals, from out-of-town or out-of-state; novice or experienced, etc.)
_____ 151

Text boxes will expand to fit your answers. Please **TAB** to the next item when you have completed your answer.

**SECTION 4 – TO BE COMPLETED BY ORGANIZATIONS THAT PROVIDE
GUIDED TRIPS FOR NON-MOTORIZED BOATS**

GUIDED TRIPS: If your organization or entity provides guided-trips for any category of non-motorized boats, answer questions #19 through #24, if not, skip to SECTION 5.

19. Please identify all California waterway locations of your guided trips: (List all)

_____ ¹⁵²

20. What is the length of your California guided trips? (Indicate all that apply)

¹⁵³ Half-day or less

¹⁵⁴ One-day

¹⁵⁵ Two-days

¹⁵⁶ Three or more days

21. Do you also provide guided trips outside of California? ¹⁵⁷ Yes ¹⁵⁸ No

22. Please complete the following for each non-motorized boat category for which you provided guided trips in California:

Non-Motorized Boat Category	Number of Participants on Guided Trips in 2006 (if data are not available for 2006, provide data for 2005)	Average Trip Cost per Participant (in dollars)
A. Canoes	_____ ¹⁵⁹	_____ ¹⁶⁰
B. Kayaks	_____ ¹⁶¹	_____ ¹⁶²
C. Inflatable Boats and Rafts	_____ ¹⁶³	_____ ¹⁶⁴
D. Small Sailboats (8 feet in length or shorter)	_____ ¹⁶⁵	_____ ¹⁶⁶
E. Rowing Boats (including row boat, shell, scull, dory, driftboat, and tender)	_____ ¹⁶⁷	_____ ¹⁶⁸
F. Sailboards and Kiteboards	_____ ¹⁶⁹	_____ ¹⁷⁰
G. Other type of non-motorized boats	_____ ¹⁷¹	_____ ¹⁷²

23. Approximately what percent of guided trip customers participate in more than one trip per year? (provide your best estimate)

¹⁷³ 0 to 25 percent

¹⁷⁴ 26 to 50 percent

¹⁷⁵ 51 to 75 percent

¹⁷⁶ 76 to 100 percent

¹⁷⁷ Don't know

24. Please briefly describe a typical guided trip customer. (For example: families, couples, groups or individuals; locals, from out-of-town or out-of-state; novice or experienced, etc.)

_____ ¹⁷⁸

Text boxes will expand to fit your answers. Please TAB to the next item when you have completed your answer.

SECTION 5 – TO BE COMPLETED BY ALL RESPONDENTS

25. Are there improvements or facility needs that would support non-motorized boating on California waterways? Examples of facility needs include restrooms, parking, signage, boating trails, storage, etc.
 179 Yes 180 No (If "no", skip to question #27)

26. If yes, please identify up to five waterway(s) and their facility needs or improvements, below:

Waterway	Facility Needs or Improvements
1. _____ 181	_____ 182
2. _____ 183	_____ 184
3. _____ 185	_____ 186
4. _____ 187	_____ 188
5. _____ 189	_____ 190

27. Do you have safety concerns related to non-motorized boating? 191 Yes 192 No
 (If "no", skip to question #29)

28. If yes, what are they? (Indicate all that apply)

- | | |
|--|---|
| <input type="checkbox"/> 193 Interactions with motorized vessels | <input type="checkbox"/> 197 Boating in unsafe weather conditions (wind, cold, heat, lightning) |
| <input type="checkbox"/> 194 Inexperienced or unprepared boaters | <input type="checkbox"/> 198 Boaters not using PFDs |
| <input type="checkbox"/> 195 Problems related to overcrowding | <input type="checkbox"/> 199 Using unsafe boats or equipment (ropes, paddles, improper boat, no helmet) |
| <input type="checkbox"/> 196 Boating in unsafe water conditions (rapids, waves, rocks, debris, unpredictable flows, tides, currents, cold water, high water, cold water) | <input type="checkbox"/> 200 Waterborne illness/poor water quality |
| | <input type="checkbox"/> 201 Other safety concerns: _____ 202 |

29. From your perspective, what, if any, changes or trends in participation, attitudes, or interest-levels have occurred in non-motorized boating over the last several years?
 _____ 203

30. What is your title or position? (Indicate one)

- | | |
|--|---|
| <input type="checkbox"/> 204 Owner or co-owner | <input type="checkbox"/> 207 Staff |
| <input type="checkbox"/> 205 Manager | <input type="checkbox"/> 208 Other: _____ 209 |
| <input type="checkbox"/> 206 President or executive director | |

31. Please provide any additional comments or suggestions related to non-motorized boating or non-motorized boating facilities in California:
 _____ 210

We value your time and thank you very much for your assistance in this important study.

OPTIONAL: This survey is confidential. However, if you would like us to contact you to further discuss non-motorized boating, you may provide your name and telephone number, and a good time to reach you, below:

If you return this survey by mail, please send it to: Wendy Pratt, NewPoint Group, 2555 Third Street, Suite 215, Sacramento, CA 95818

Exhibit D.2

Summary of Active-User Commercial/Institutional Respondents in California (2006) (n=112)

Type of Entity*	
Commercial	72%
Non-profit	19%
Institutional	17%
Local gov	6%
Private	1%
Aquatic center	9%
Guide or instructor	4%
First Aid Instruction	1%
<i>* Adds to over 100 as some businesses have multiple designations</i>	

Number of Boats in Fleets	
Canoes	942
Recreational kayaks	2,908
Sit-on-top kayaks	2,194
Sea/touring kayaks	1,864
Inflatable kayaks	1,175
Whitewater kayaks	450
Other kayaks	279
Inflatable rafts	3,500
Other inflatable boats	56
Small sailboats	433
Rowing boats	279
Sailboards	743
Kiteboards	74
Other boats	195
Total**	15,062
<i>* Sit-on-top kayaks were identified separately from recreational kayaks for this survey</i>	
<i>** From 112 non-respondents and 131 non-responders</i>	

Replace Boats in Fleet	
Within 1 year	3%
Once a year	6%
2 to 3 years	27%
4 to 5 years	20%
More than 5 years	45%
100%	

Focus of Business	
Non-Motorized Boating	72%
Motorized or Large Sail Boats	1%
Outdoor or Retail	7%
Boating Education	6%
Recreational Activities	8%
Other	6%
100%	

Number of Business Locations	
1	77%
2	14%
3	2%
4	1%
5	4%
6	2%
100%	

Position of Survey Respondent	
Owner or co-owner	40%
Manager	31%
President or exec director	14%
Staff	4%
Other	11%
100%	

Types of Instruction	
Beginning	99%
Intermediate	86%
Advanced	55%
Safety first aid	47%
Swift water rescue	22%
For guides or instructors	40%
Private classes	44%
Other	23%
<i>* Adds to over 100 as most entities teach multiple types of classes</i>	

Years in Business	
1 to 2	6%
3 to 4	7%
5 to 6	6%
7 to 8	4%
9 to 10	9%
11 to 14	12%
15 to 20	11%
Over 20 years	45%
100%	

	Percent of Repeat Customers		
	Rental	Instruction	Guided Trips
0 to 25 percent	51%	53%	84%
26 to 50 percent	29%	21%	10%
51 to 75 percent	12%	16%	4%
76 to 100 percent	5%	4%	0%
Don't know	3%	6%	2%
	100%	100%	100%

Guided Trips Outside California (n=68)	
Yes	28%
No	72%
100%	

	Non-Motorized Boat Activities	
	Completed Surveys	No Response**
Rental	43	60
Instruction	73	49
Guided Trips	68	74
Total	112	121
<i>* Does not sum as many businesses provide multiple activities</i>		
<i>** Excluding ten yacht clubs</i>		

Exhibit D.3

Commercial and Institutional Total Participants and Expenditures in California (2006)

Activity	Statewide		North Coast Region		San Francisco Region		Central Coast Region	
	Participants	Expenditures	Participants	Expenditures	Participants	Expenditures	Participants	Expenditures
Rental	208,902	\$5,572,356	45,522	\$1,269,050	13,628	\$357,340	12,008	\$398,232
Instruction	87,093	\$7,786,644	4,290	\$305,783	18,802	\$1,484,708	5,146	\$401,561
Guided Trips	243,827	\$39,431,769	20,711	\$2,001,817	12,692	\$2,158,095	9,250	\$825,550
Total	539,822	\$52,790,769	70,523	\$3,576,650	45,122	\$4,000,143	26,404	\$1,625,343

Activity	South Coast Region		San Diego Region		Northern Interior Region		Sacramento Basin Region	
	Participants	Expenditures	Participants	Expenditures	Participants	Expenditures	Participants	Expenditures
Rental	62,836	\$1,387,076	18,825	\$497,775	375	\$9,375	24,383	\$1,003,758
Instruction	21,314	\$2,134,241	28,279	\$1,670,578	1,218	\$136,190	5,906	\$1,366,675
Guided Trips	24,167	\$3,379,778	5,875	\$1,014,725	12,360	\$2,418,040	92,338	\$16,221,704
Total	108,317	\$6,901,095	52,979	\$3,183,078	13,953	\$2,563,605	122,627	\$18,592,137

Activity	Central Valley Region		Eastern Sierra Region		Southern Interior Region	
	Participants	Expenditures	Participants	Expenditures	Participants	Expenditures
Rental	30,000	\$620,000	325	\$9,750	1,000	\$20,000
Instruction	388	\$104,658	200	\$11,000	1,550	\$171,250
Guided Trips	66,234	\$11,399,060	200	\$13,000	–	\$ –
Total	96,622	\$12,123,718	725	\$33,750	2,550	\$191,250

Exhibit D.4

Estimated Number of Non-Motorized Boats by Type in Commercial and Institutional Fleets in California (2006)

Boat Type	Number
Canoes	942
Kayaks	8,870
<i>Recreational kayak</i>	2,908
<i>Sit-on-top kayak</i>	2,194
<i>Inflatable kayak</i>	1,175
<i>Whitewater kayak</i>	450
<i>Sea/touring kayak</i>	1,864
<i>Other kayak</i>	279
Inflatable rafts and boats	3,526
Small sailboats	433
Rowing boats and shells	279
Sailboards and Kiteboards	817
Other Boats	195
Total	15,062

Exhibit D.5
Non-Motorized Boating Commercial and Institutional Entities (2006)

Page 1 of 5

	Company/Organization	Website	Region	Telephone
1	A B Seas Kayaks	montereykayak.com	CC	831-647-0147
2	ABK Boardsports Windsurfing Camps	abkboardsports.com		n/a
3	Access to Sailing	accesstosailing.org		562-433-0561
4	Action Watersports	actionwatersports.com	SC	310-827-2233
5	Action Whitewater Adventures	riverguide.com	SB	800-453-1482
6	Adventure Center	raftingtours.com		541-488-2819
7	Adventure Connection	raftcalifornia.com	SB	800-226-6060
8	Adventure Rents	adventurerents.com	NC	707-884-4FUN
9	Adventure Sports	adventuresportsonline.com	CC	415-EZ-Sport
10	Adventure Sports Unlimited, Inc.	asudoit.com	CC	831-458-3648
11	Adventures By The Sea	adventuresbythesea.com	CC	831-372-1807
12	Alfredo's Beach Club	alfredosbeachclub.com	SC	562-434-1542
13	All Craft	oaklandallcraft.com	SF	510 444-7115
14	Allen's Kayaks	allenskayaks.com	SD	858-488-5599
15	All-Outdoors California Whitewater Rafting	aorafting.com	SF	800-247-2387
16	Alpine Training Services	alpinets.com	SC	626-434-3636
17	American Red Cross	sacsierraredcross.org	SB	916-368-3130
18	American River Raft Rentals	raftrentals.com	SB	916-635-6400
19	American River Recreation	arrafting.com	SB	800-333-7238
20	American River Touring Association	arta.org/non_profit.htm	CC	800/323-2782
21	American Whitewater Expeditions	americanwhitewater.com	SC	800-825-3205
22	Aqua Adventures	aqua-adventures.com	SD	800-269-7792
23	Aquasports	islandkayaking.com	SC	800-773-2309
24	ASD	asdwindurfing.com	SF	877-348-8486
25	Atascadero Kayak & Sail	fastkayak.com	SC	805-441-7463
26	Avalon Boat Stand (Jay's Rent-a-boat)	catalina.com/rent-a-boat.html	SC	310-510-0455
27	B& D Sports	n/a	SF	415-364-5995
28	Bay Area Outdoor Adventure Club	outdooradventureclub.com	SF	415-954-7190
29	Berkeley Boardsports	boardsports.com	SF	510-843-9283
30	Beyond Limits Adventures	rivertrip.com	CV	800-234-RAFT (7238)
31	Big Bear Marina	bigbearmarina.com	SI	909-866-3218
32	Bigfoot Rafting Company	bigfootrafting.com	NI	800-722-2223
33	Bio Bio Expeditions	bbxrafting.com	NC	800.246.7238
34	Birch Circle Adventures	birchcircle.com	SF	415-459-7717
35	Blue Waters Kayaking	bwkayak.com	NC	415-669-2600
36	Boardsports School Alameda	boardsportsschool.com	SF	415-385-1224
37	Bodega Bay Kayak/Bodega Bay Surf Shack	bodegabaykayak.com <i>or</i> bodegabaykurf.com	NC	707-875-8899, 707-875-3944
38	Burke's Canoe Trips	burkescanoetrips.com	NC	707-887-1222
39	Cabrillo Beach Yacht Club*	cbyc.org	SC	310-519-1694
40	Cache Canyon Whitewater River Trips	cachecanyon.com	SB	800-796-3091
41	Cal Adventures	caladventures.com	SF	n/a
42	Cal Sailing Club	cal-sailing.org	SF	none
43	Caldera Kayaks	calderakayak.com	ES	760-934-1691
44	California Canoe & Kayak	calkayak.com	SF, SB	800-366-9804
45	California Kayak Academy	n/a	NC	707-433-6707
46	California Maritime Academy Sailing Program	cmaathletics.org	SF	707-654-1050
47	California River Rafting	california-river-rafting.com	SB	800-523-5531
48	California State University, Northridge Aquatic Center	http://rtm.csun.edu	SC	818-677-3202
49	California Watersports	carlsbadlagoon.com	SD	760-434-3089
50	California Windsurfing	californiawindsurfing.com	SF	650-594-0335
51	California Yacht Club*	calyachtclub.com	SC	310-823-4567

Exhibit D.5

Non-Motorized Boating Commercial and Institutional Entities (2006) (continued)

Page 2 of 5

	Company/Organization	Website	Region	Telephone
52	Canyon Raft Rentals	canyonraftrentals.com	SB	530-823-0931
53	Captain John's Marina	captainjohnsmarina.com	SI	909-866-6478
54	Captain Kirk's Windsurfing	captainkirks.com	SC	310-833-3397
55	Carlsbad Paddle Sports	carlsbadpaddle.com	SD	760-434-8686
56	Carpinteria City Parks and Ocean Recreation	ci.carpinteria.ca.us <i>or</i> ci.carpinteria.ca.us/parks_rec/index.shtml	SC	805-684-5405
57	Catalina Kayak Adventures	catalinakayaks.com	SC	310-510-2229
58	Catch a Canoe and Bicycles Too (at Standford Inn by the Sea)	catchacanoe.com	NC	800-331-8884
59	CBOC (Chili Bar Outdoor Center) Whitewater	https://secure.adventuresports.com/wraft/cboc	SB	800-356-2262
60	Central Coast Kayaks	centralcoastkayaks.com	SC	805-773-3500
61	Central Coast Outdoors	centralcoastoutdoors.com	CC	805-528-1080
62	Channel Islands Kayak Center	cikayak.com	SC	805-644-9699
63	China Cove Kayak Adventures	chinacovekayadventures.com	SD	949-632-4694
64	Chuck Richards Whitewater, Inc.	chuckrichards.com	CV	760-376-3776, 7600379-4444
65	City Kayak	citykayak.com	SF	415-357-1010
66	City of Oakland, Office of Parks & Recreation, Boating Department	oaklandnet.com/parks <i>or</i> oaklandnet.com/parks/programs/boating.asp	SF	510-238-2196
67	City of Santa Rosa Recreation & Parks Department, Howarth Park	santarosarec.com <i>or</i> http://ci.santa-rosa.ca.us/default.aspx?PageId=23	NC	707-543-3282
68	Clavey River Equipment	clavey.com	NC	707-766-8072
69	Coastal Kayak Fishing	kayakfishing.com	SC	310-457-3012
70	Coronado Yacht Club*	coronadoyc.org	SD	619-435-1848
71	Crown Cove Aquatic Center	swccd.edu <i>or</i> swccd.edu/4thLevel/index.asp?L3=292	SD	619-575-6176
72	CSU, Channel Islands	n/a	SC	n/a
73	CSU Chico, Adventure Outings	n/a	SB	n/a
74	CSU Chico, Forebay Aquatic Center	aschico.com/?Page=536	SB	530-624-6919
75	CSUMB Boating Education Program	montereyboating.org	CC	831-582-4271
76	Current Adventures Kayak School	currentadventures.com	SB	888-452-9254
77	Dana Point Jet Ski and Kayak Center	danapointjetski.com	SC	949-661-4947
78	Dana Point Youth and Group Facility	ocparks.com/dpyg	SC	949-923-2215
79	Davenport SurfSail	davenportsurfsail.com	CC	831-429-6051
80	Del Rey Surf & Sport	delreysurfandsport.com	SC	310-305-3023
81	Delta Windsurf Company	deltawindsurf.ezstores.net	SB	916-777-2299
82	DeRiemer Adventure Kayaking	adventurekayaking.com	SB	530-295-0830
83	Descanso Beach Ocean Sports, Inc.	kayakcatalinaisland.com	SC	310-510-1226
84	Destination Wilderness	wildernesstrips.com		541-549-1336
85	Disabled Sports USA Far West	dsusafw.org	SB	916-722-6447
86	Earthtrek Expeditions	earthtrekexpeditions.com	SB	530-642-1900
87	ECHO River Trips	echotrips.com	SF	510-652-1600
88	Encinal Yacht Club*	encinal.org	SF	510-522-3272
89	Environmental Traveling Companions	etctrips.org	SF	415-474-7662, ext 15
90	Eskape! Sea Kayaking	eskapekayak.com	CC	831-476-5385
91	Family Kayak Adventure Center	familykayak.com	SD	619-282-3520
92	Far West Outdoors	farwestoutdoors.com	SB	530-887-1963
93	Feather River College, Outdoor Recreation Leadership Program	http://frc.edu/stock/Department/index.html	SB	800-442-9799, ext. 275
94	Fluid Dynamics Kayaking	kayakclass.com	SB	530-344-8373
95	Gold Rush Whitewater Rafting	goldrushriver.com	SB	530-295-8235
96	Half Moon Bay Kayak Co.	hmbkayak.com	NC	650-773-6101
97	Healing Waters	hwaters.org	SF	415-552-1190
98	High Country Expeditions	highcountryexpeditions.com		541-822-8288

Exhibit D.5

Non-Motorized Boating Commercial and Institutional Entities (2006) (continued)

Page 3 of 5

	Company/Organization	Website	Region	Telephone
99	Hike Bike Kayak	hikebikekayak.com	SD	858-551-9510
100	Humboats Kayak Adventures	humboats.com	NC	707-443-5157
101	Humboldt State University, Center Activities	humboldt.edu/~cntract	NC	707-826-3357
102	Jack London Aquatic Center	jlac.org	SF	510-208-6060
103	James Henry River Journeys	riverjourneys.com	SF	415-868-1836
104	Kayak Connection	kayakconnection.com	SC	831-479-1121
105	Kayak Horizons	kayakhorizons.com	NC	805-772-6444
106	Kayak Tahoe	kayaktahoe.com	SB	530-544-2011
107	Kayak Zak	kayakzak.com	NC	707-498-1130
108	Kern River Outfitters	kernrafting.com	CV	800-323-4234
109	Kern River Tours	kernrivertours.com	CV	760-379-4616
110	Kings River Expeditions	kingsriver.com	CV	559-233-4881
111	King's Sport & Tackle	guernevillesport.com/rentals.htm	NC	707-869-2156
112	Kite Wind Surf	kitewindsurf.com	SF	510-522-WIND
113	Klamath River Outfitters	klamathriveroutfitters.com/	NI	530-469-3349
114	Klamath River Resort Inn	klamathriverresortinn.com	NI	530-493-2735
115	Kokopelli River Center	kokopelliriverguides.com		541-201-7694
116	Koolriver Adventure Tours	koolriveradventure.com	SC	800-931-8999
117	La Jolla Kayak	lajollakayak.com	SD	858-459-1114
118	La Jolla Kayak Fishing	kayak4fish.com	SD	619-461-7172
119	Lake Cunningham, City of San Jose	sanjoseca.gov/prns or lakecunningham.org	SF	408-277-4319
120	Lake Francis Resort	lakefrancisrv.com/info/boatrent.htm	SB	530-692-1700
121	Lake Merritt Boating Center	oaklandnet.com/parks/facilities/lmbc.asp	SF	510-238-2196
122	Lake Siskiyou Camp Resort	lakesis.com	NI	530-926-2618
123	Leo Robbins Sailing and Kayaking Center, City of Ventura	cityofventura.net	SC	805-643-3612
124	Liquid Fusion Kayak Company	liquidfusionkayak.com	SD	619-992-6602
125	Living Waters Recreation	livingwatersrec.com	NI	800-994-RAFT
126	Long Beach Windsurf Center	windsurfcenr.com	SC	562-433-1014
127	Malibu Ocean Sports	hookedonkayaks.com	SC	562-592-0800
128	Malibu Surf Shack	malibusurfshack.com	SC	310-456-8508
129	Marble Mountain Ranch	marblemountainranch.com	NI	800-Klamath (552-6284)
130	Mariah Wilderness Expeditions	mariahwe.com	SB	530-626-6049
131	McBroom and Co Packers and Guides	mcbroompackers.com	NI	530-462-4617
132	Miramar Adventures	miramar-adventures.com	SC	206-322-6559
133	Mission Bay Aquatic Center	missionbayaquaticcenter.com	SD	858-488-1000
134	Momentum River Expeditions	momentumriverexpeditions.com		866 663 5628
135	Monterey Bay Kayaks	montereybaykayaks.com	CC	800-649-5357
136	Mother Lode River Center	malode.com	SB	800-427-2387
137	Mountain & River Adventures	mtnriver.com	CV	760-376-6553
138	Newport Aquatic Center	newportaquaticcenter.com	SC	949-646-7725
139	Noah's River Adventures	noahsrafting.com		800-858-2811
140	Nonesuch Whitewater	n/a	NC	707-823-6603
141	North Coast Adventures	northcoastadventures.com	NC	707-822-2989
142	North Country Raft Rental	raftredding.com	SB	530-244-4281
143	North Rim Adventure Sports	northrimadventure.com	SB	530-345-2453
144	O.A.R.S. Inc.	oars.com	CV	800-346-6277
145	OEX Dive & Kayak Center	oexpress.com	SD	619-758-9531
146	Off The Beach	n/a	NC	415-868-9445
147	Offshore Watersports	owsrentals.com	SC	562-436-1996
148	Orange Torpedo Trips, Inc.	orangetorpedo.com		800-635-2925
149	Osprey Outdoors Kayak School	ospreykayak.com	NI	530-926-6310

Exhibit D.5

Non-Motorized Boating Commercial and Institutional Entities (2006) (continued)

Page 4 of 5

	Company/Organization	Website	Region	Telephone
150	Otter Bar Lodge Kayak School	otterbar.com	NI	530.462.4772
151	Outback Adventures	outbackadventures.com	SF	408-551-0588
152	Outdoor Adventures, UC Davis	http://campusrecreation.ucdavis.edu/outdoor_adventures	SB	530-752-1995
153	Outdoors Unlimited, UC San Francisco	outdoors.ucsf.edu	SF	415-476-2078
154	Pacific Coast Kayak Adventures	bigsurkayakadventures.net	CC	831-601-0547
155	Pacific Corinthian Youth Foundation	pcyf.org	SC	805-985-0660
156	Pacific River Supply	pacificriversupply.com	SF	510-223-3675
157	Paddle Power Kayaks	paddlepowerkayaks.com	SC	949-675-1215
158	Paddle Sports of Santa Barbara	www.kayaksb.com	SC	888-254-2094
159	Paddle Up Kayak	paddleup.com	NC	707 953-8800
160	Peak Adventures	peakadventures.org	SB	916-278-6321
161	Pleasure Point Marina, LLC	pleasurepointbbl.com	SI	909-866-2455
162	Point Reyes Outdoors	pointreyesoutdoors.com	NC	415-663-8192
163	Point Reyes Outdoors	pointreyesoutdoors.com	NC	415-663-8192
164	Rancheria Enterprises	rancheriaenterprises.com		559-893-3234
165	Recreational Equipment Inc.	rei.com	SB, SF, SD, SC	800-426-4840
166	Redwoods and Rivers Rafting Company	redwoods-rivers.com	NC	800-429-0090
166	Rescue Source	rescuesource.com	SB	800-457-3728
167	Resort Watersports	resortwatersports.com	SD	800-585-0747
168	Resort Watersports	resortwatersports.com	CV	800-585-0747
169	Resort Watersports	resortwatersports.com	SD	800-585-0747
170	Richmond Yacht Club*	richmondyc.org	SF	510 237-2821
171	River and Rock Adventures	riverandrockadventures.com		866-748-7625
172	River City Oar and Paddle	n/a	SB	n/a
173	River Country Rafting	klamathrafting.com	NI	530-493-2207
174	River Dancers	riverdancers.com	NI	530-926-3517
175	River Journey	riverjourney.com	CV	800-292-2938
176	River Otter Adventures	whitewaterotter.com	SB	877-687-RAFT
177	River Rat Raft Rentals	river-rat.com	SB	916-966-6777
178	River Runners	riverrunnersusa.com	SC	818-887-5310 S.CA 530-622-5110 N.CA
179	River Travel Center	mcn.org/a/rivers		800-882-7238
180	River's Edge Kayak & Canoe Trips	riversedgekayakandcanoe.com	NC	800-345-0869
181	Riversend Rafting & Adventure	riversendrafting.com	CV	866-360-RAFT
182	Rock Kayak Co. LLC	rockkayak.com	CC	805-772-2906
183	Rock-N-Water	rocknwater.com	SB	800-738-0555
184	Rocky Point King Harbor	rockypointfun.com	SC	310-374-9858
185	Rogue Klamath River Adventures	rogueklamath.com		800-231-0769
186	Rogue River Journeys	roguerivertrips.com		866-213-7754
187	Rubicon Whitewater Adventures	rubiconadventures.com	NC	707-887-2452
188	Russian River Outfitters	russianriveroutfitters.com	NC	877-RR-KAYAK
189	Sacramento State Aquatic Boating & Safety Center	csusaquaticcenter.com	SB	916-278-2842
190	San Diego Bike and Kayak Tours Inc.	sandiegobikeandkayaktours.com	SD	858-437-1224
191	San Diego Sailing Center	kayaksforsale.com	SD	858-488-0651
192	San Diego Yacht Club*	sdyc.org	SD	619-221-8400
193	San Francisco State University Sailing Program	http://online.sfsu.edu/~mjarrow/index.htm	SF	415-405-2449
194	San Francisco Yacht Club*	sfyc.org	SF	415-435-9133
195	San Jose State Rowing	n/a	SF	
196	Santa Barbara Adventure Company	sbadventureco.com	SC	805-898-0671
197	Santa Barbara Kayaks	sbkayaks.com	SC	805-564-1136
198	Save The Bay	savesfbay.org	SF	510-452-9261

Exhibit D.5

Non-Motorized Boating Commercial and Institutional Entities (2006) (continued)

Page 5 of 5

	Company/Organization	Website	Region	Telephone
199	Sea Trek	seatrekkayak.com	SF	415-488-1000
200	Seaforth Boat Rentals	seaforthboatrental.com	SD	619-223-1681
201	Sequoia Yacht Club*	sequoiayc.org	SF	650-361-8538
202	Sheldon Kiteboarding	sheldonkiteboarding.com	SB	707-374-3053
203	Sierra Mac River Trips	sierramac.com	CV	800-457-2580
204	Sierra Outdoor Center	sierraoutdoorcenter.com	SB	530-885-1844
205	Sierra South Mountain Sports	sierrasouth.com	CV	760-376-3745
206	Solid Rock and Raft Youth Adventures	solidrockandraft.com	SB	530 629-2944
207	Sonoma Outfitters	sonomaoutfitters.com	NC	707-528-1920
208	Southwind Kayak Center	southwindkayaks.com	SC	949-261-0200
209	St. Francis Yacht Club*	stfyc.com	SF	415-563-6363
210	Stanford Sailing Summer Camp Program	stanfordsailing.org	SF	650-723-2811
211	Stockton Sailing Club	stocktonsc.org	CV	209-951-5600
212	Subsea Tours & Kayaks	subseatours.com	NC	805-772-3349 or 9463
213	Sunrise Mountain Sports	sunrisemountainsports.com	SF	925-447-8330 (store) 925-245-9481 (kayak center)
214	Sunshine Rafting Adventures	raftadventure.com	CV	800-829-7238
215	Tahoe Adventure Company	tahoeadventurecompany.com	SB	530-913-9212
216	Tahoe City Kayak	tahoeckayak.net	SB	866-816-4945
217	Tahoe Paddle & Oar	tahoeppaddle.com	SB	530-581-3029
218	Tahoe Whitewater Tours	gowhitewater.com	SB	530-581-2441
219	The Sports Exchange	truckeesportsexchange.com	SB	530-582-4510
220	Tributary Whitewater Tours	whitewatertours.com	SB	800-672-3846
221	Trinity River Rafting	trinityriverrafting.com	SB	530-623-3033
222	Turtle River Rafting	turtleriver.com	NI	800-726-3223
223	UC Irvine, Boating Program	campusrec.uci.edu or campusrec.uci.edu/outdoor/index.asp	SC	949-824-5346
224	UCLA Marina Aquatic Center	recreation.ucla.edu/mac	SC	310-823-0048
225	UCSC Community Boating Center	ucsc.edu/opers/boating	CC	n/a
226	United States Adaptive Recreation Center	usarc.org	SI	909-584-0269
227	UP Sports	upsportsoc.com	SC	949-443-5161
228	Vallejo Yacht Club*	vyc.org	SF	707-643-1254
229	Ventura Harbor	venturaharbor.com	SC	805-642-8538
230	Venture Quest	kayaksantacruz.com	CC	831-427-2267
231	W.E.T. River Trips	raftwet.com	SB	888-723-8938
232	Westwind Adventures	kayakmartinez.com	SF	925-229-KAYAK
233	Whitewater Adventures	gotwhitewater.com	SB	800-97RIVER (74837)
234	Whitewater Connection	whitewaterconnection.com	SB	800-336-7238
235	Whitewater Excitement	whitewaterexcitement.com	SB	800-750-2386
236	Whitewater Voyages	whitewatervoyages.com	SF	800-400-7238
237	Wilderness Adventures	wildrivertrips.com	NI	530-887-8363
238	Wind Walker Boardsports	wind-walker.com	NC	707-874-2331
239	Windsurf Diablo	n/a	SF	925-778-6350
240	Wolf Creek Wilderness	wolfcreekwilderness.com	SB	530-477-2722
241	Xstreamline Sports	xstreamline.com	SF	310-514-9514
242	YMCA, Central Valley Chapter	centralvalleyYMCA.org	CV	559-335-2382
243	Zephyr Whitewater Expeditions	zrafting.com	CV	800-431-3636

* Yacht club estimated boats and participation are included in totals for clubs in Section 2 and Exhibit B-2

Exhibit D.6

Commercial Whitewater Rafting Participation Numbers* on Eleven California Rivers (1983 to 2006)

Year	Sacramento Basin Region Rivers			Central Valley Region Rivers						North Coast Region Rivers	
	South Fork American	Middle Fork American	North Fork American	Lower Kern River	Upper Kern River	Forks of the Kern River	Tuolumne River	Kaweah River	Kings River	Klamath River	Cal-Salmon River
1. 1983	–	–	–	12,470	6,373	696	2,000	–	–	7,904	2,075
2. 1984	–	–	–	11,966	3,135	479	3,837	–	–	9,037	2,117
3. 1985	–	–	–	14,795	3,557	782	3,902	–	–	11,697	1,954
4. 1986	–	–	–	17,254	5,767	935	3,819	–	–	8,375	1,836
5. 1987	–	–	–	13,131	2,881	890	–	–	–	7,100	2,048
6. 1988	–	–	–	10,748	2,911	596	1,815	–	–	7,969	1,536
7. 1989	–	–	–	10,247	4,747	1,016	2,863	–	–	8,718	1,214
8. 1990	–	–	–	7,923	3,976	641	3,181	–	–	8,454	1,238
9. 1991	–	6,003	749	5,745	3,438	494	2,172	–	–	8,297	979
10. 1992	78,800	9,975	123	8,998	3,584	564	3,019	–	–	9,484	711
11. 1993	91,500	11,997	3,096	14,248	8,039	977	4,331	–	–	9,444	2,079
12. 1994	73,000	11,589	–	9,671	3,574	601	3,935	–	–	8,491	1,801
13. 1995	105,000	11,374	3,302	18,298	13,648	816	2,954	–	–	12,203	4,474
14. 1996	94,450	15,394	2,362	15,966	8,368	761	3,236	–	–	10,280	2,542
15. 1997	90,750	16,337	1,130	16,509	7,602	588	3,986	3,052	–	10,529	2,542
16. 1998	76,900	10,008	2,890	15,289	9,893	434	2,831	4,375	–	11,298	2,885
17. 1999	80,900	14,288	1,732	12,597	4,798	483	3,198	1,730	–	11,885	2,224
18. 2000	89,100	16,520	1,351	13,687	5,618	509	4,700	2,122	12,167	12,399	2,338
19. 2001	45,750	19,416	930	13,523	5,048	461	1,840	1,986	9,886	14,646	1,191
20. 2002	60,100	13,757	1,505	9,840	4,003	275	3,149	1,981	9,417	14,114	1,692
21. 2003	59,450	14,174	1,287	13,789	5,926	506	2,779	1,630	8,191	13,688	2,018
22. 2004	65,343	16,486	660	13,495	4,247	313	2,795	1,064	7,139	14,494	1,358
23. 2005	71,593	11,901	1,980	18,205	8,281	491	2,625	3,182	11,127	13,576	1,734
24. 2006	71,000	–	1,132	–	–	–	3,538	2,451	–	–	–

* Participation data were not available for all years and rivers.

Source: River use data provided by Klamath National Forest Commercial Whitewater Use (Klamath, Scott, and Salmon Rivers); Sequoia National Forest (Kern Rivers); California State Parks, Auburn Office (Middle and North Fork of the American River); El Dorado County (South Fork of the American River); Stanislaus National Forest (Tuolumne River); Tulare County Kaweah River Management Plan (Kaweah River); and Terry Schumaker, Sierra National Forest (Kings River).