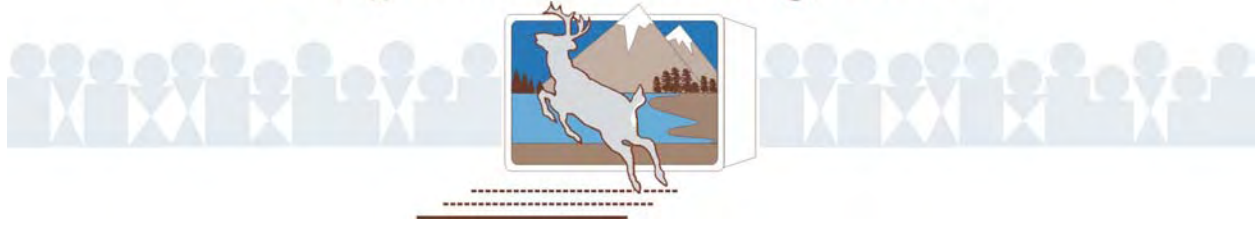


Responsive Management



WASHINGTON BOATER NEEDS ASSESSMENT

DATA SUMMARY

**An independent assessment of Washington State boaters' needs submitted
to the Washington State Recreation and Conservation Office**

by Responsive Management

2007

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INTRODUCTION

This study was conducted for the Washington State Recreation and Conservation Office (RCO) to determine the needs of Washington boaters and to help determine priorities for allocating resources. The Washington State Legislature (60th Legislature, 2007 Session) authorized the needs assessment in Substitute House Bill 1651. The RCO commissioned Responsive Management to conduct the needs assessment. The study entailed focus groups of boating services providers, a telephone survey of boating services providers, a telephone survey of the general public in Washington, and a telephone survey of registered boaters in Washington. One of the primary purposes of the focus groups was to provide qualitative information that was used in the subsequent design of the survey instruments; therefore, the focus group results by themselves are not presented here.

TELEPHONE SURVEY METHODOLOGY

For this project, Responsive Management conducted three surveys: a survey of boating services providers, a survey of registered boat owners, and a survey of the general population. Note that the surveys of registered boat owners and the general population used the same survey instrument. Therefore, the study used two survey instruments to obtain data.

SURVEY SAMPLES

The sample of boating services providers consisted of those whose duties pertain in part to boating, such as agency staff, port and marina managers and staff, and civic leaders. This sample was obtained from the RCO and verified by additional on-line research by Responsive Management's researchers.

The sample of registered boat owners—those who had a registered boat in 2006—was obtained from the RCO. The general population sample was randomly chosen from all state households headed by a person aged 18 years old and older.

QUESTIONNAIRES AND INTERVIEWING PROCEDURES

The telephone survey questionnaires were developed cooperatively by Responsive Management and the RCO. Responsive Management conducted pre-tests of the questionnaires and made revisions to them based on the pre-tests. Interviews of the general population and registered boat owners were conducted Monday through Friday from 9:00 a.m. to 9:00 p.m., Saturday noon to 5:00 p.m., and Sunday from 5:00 p.m. to 9:00 p.m., local time. The interviews were conducted in October and November 2007. Responsive Management obtained a total of 1,143 completed interviews among the general population and 2,086 completed interviews of registered boat owners (for a total unweighted sample of 3,229 boaters).

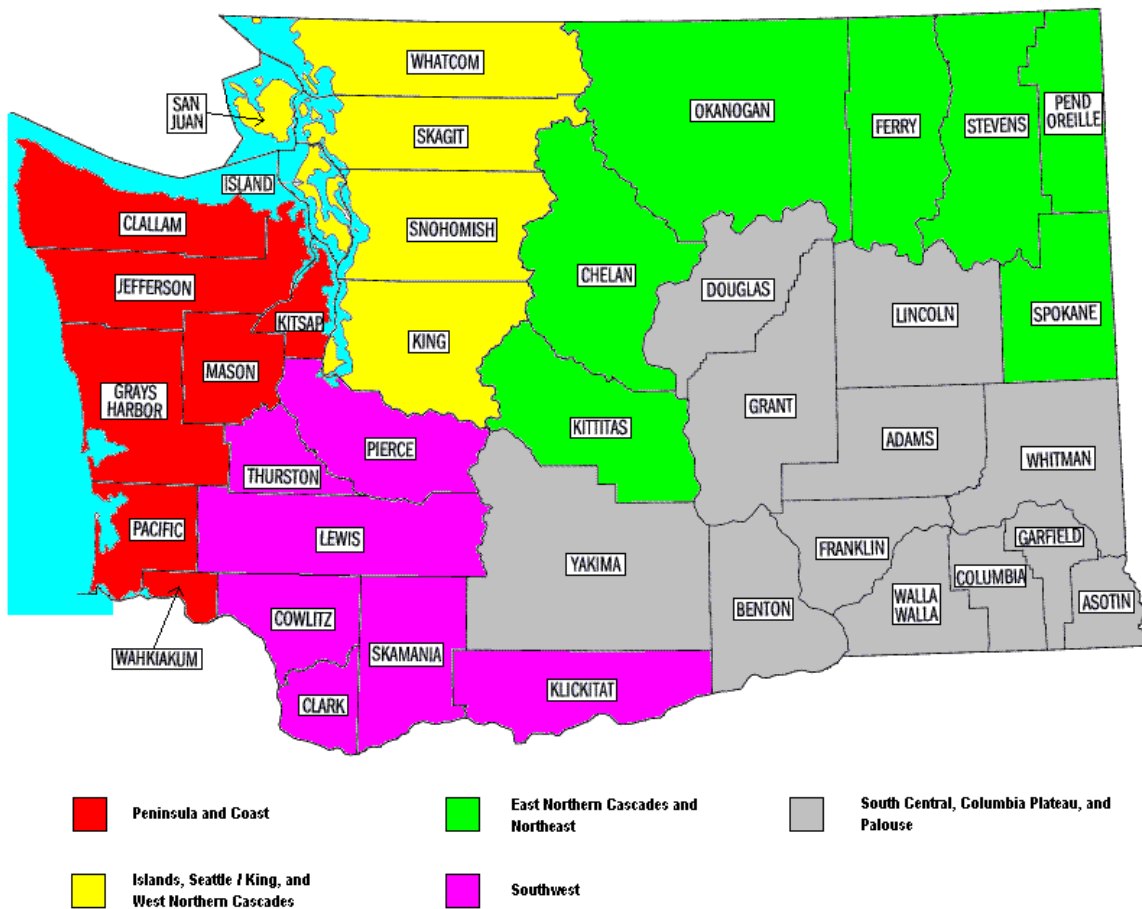
Interviews of boating services providers were conducted Monday through Friday from 9:00 a.m. to 1:00 p.m., local time (as well as other times by appointment) in November. These boating services providers were notified via e-mail prior to being called that a survey was underway. These pre-survey contacts helped ensure that the survey had a high response rate. Responsive Management obtained a total of 211 completed interviews of boating services providers.

The software used for data collection was Questionnaire Programming Language 4.1 (QPL). The analysis of data was performed using Statistical Package for the Social Sciences software as well as proprietary software developed by Responsive Management.

DATA ANALYSES BY BOATER TYPE AND REGION

The data from the surveys of registered boat owners and the general population were amalgamated into a single data set (hereinafter referred to as the “amalgamated data”). The analysis of these data considered three types of boaters: owners of at least one registered boat (referred to as “Registered Boat Owners”), owners of non-registered boats (referred to as “Non-Registered Boat Owners”), and boat users who do not own a boat, such as those who boated on a friend’s boat (referred to as “Non-Owners”). (Note that in Washington, all boats 16 feet or more in length or with 10 or more horsepower are required to be registered; for boats under those thresholds not used on navigable waters, registration is not required.) In addition, the analysis considered the region in which the boater most often boated, as shown in the listing and map that follows.

- Peninsula and Coast Region (Clallam, Grays Harbor, Jefferson, Kitsap, Mason, Pacific, and Wahkiakum Counties)
- Islands, Seattle/King, and West Northern Cascades Region (Island, King, San Juan, Skagit, Snohomish, and Whatcom Counties)
- East Northern Cascades and Northeast Region (Chelan, Ferry, Kittitas, Okanogan, Pend Oreille, Spokane, and Stevens Counties)
- Southwest Region (Clark, Cowlitz, Klickitat, Lewis, Pierce, Skamania, and Thurston Counties)
- South Central, Columbia Plateau, and Palouse Region (Adams, Asotin, Benton, Columbia, Douglas, Franklin, Garfield, Grant, Lincoln, Walla Walla, Whitman, and Yakima Counties)



DATA WEIGHTING

The amalgamated data were weighted so that the proportions of boater types and regions matched the estimated proportions of these types/regions in the state. A full description of the weighting plan is provided in the full report titled, *Washington Boater Needs Assessment: Data Compendium*.

CROSTABULATION ANALYSES

In addition to the analyses of the amalgamated data statewide, crosstabulations of the amalgamated data were run to determine results of subgroups within the total population of boaters. Four crosstabulations were run on nearly all the data, listed below:

1. Crosstabulation by registration/ownership status: registered boat owners, non-registered boat owners, and non-owners.
2. Crosstabulation by region in which boater most often boats.
3. Crosstabulation by type of boat most often used: motor boats, sailboats, paddlers (i.e., canoes and kayaks), and other hand-powered boats.
4. Crosstabulation by size of motor boat most often used: Under 16 feet (Class A), 16 feet to 25 feet (Class 1), 26 feet or more (Classes 2 and 3), and personal watercraft.

SAMPLING ERROR

Throughout this report, findings of the telephone surveys of the general population and registered boaters are reported at a 95% confidence interval. For the entire amalgamated sample of boaters, the sampling error is at most plus or minus 1.72 percentage points.

GENERAL POPULATION AND BOATER SURVEY RESULTS

TYPE OF BOATER (REGISTERED BOAT OWNER, NON-REGISTERED BOAT OWNER, NON-OWNER)

- Based on several questions about boat use and ownership, a breakdown of the population of boaters is as follows: 44% are registered boat owners, 14% are non-registered boat owners, and 42% are non-owners.

NUMBERS AND TYPES OF BOATS OWNED, REGISTERED, AND USED

- Boaters were asked to name all the types of boat ownership of the boats that they had boated on in the past 2 years in Washington: 66% used a boat (or boats) that they owned, 45% boated on a friend's boat (or boats), 8% rented a boat (or boats), and 5% chartered a boat (or boats) with a skipper.
- The survey then asked boaters about the boat that they most often used. Among all boaters, 60% owned the boat they used most often in the previous 2 years, while 29% indicated being a guest on a friend's boat. The remainder rented, chartered, or cannot be categorized. Currently, 58% of boaters overall own a boat.
 - In the crosstabulation by region, boaters from the Peninsula and Coast Region and from the Islands, Seattle/King, and West Northern Cascades Region were less likely to say that the boat they used most often was a boat they owned than were boaters from the other regions. The Islands, Seattle/King, and West Northern Cascades Region also had a slightly lower rate of current boat ownership.
- Boat owners were asked to name the type(s) of boat(s) that they own: 75% own a motor boat, 19% own a hand-powered boat other than canoe or kayak, 14% own a kayak, 12% own a canoe, 8% own a sailboat, and 5% own a personal watercraft.
 - The crosstabulation by type of owner found that registered boat owners more often own a motor boat than do non-registered boat owners; this latter group more often own other hand-powered boats, kayaks, and canoes.

- Of boat owners, the majority (53%) own a single boat; nonetheless, 26% own two boats, and 21% own three or more. A breakdown of this question by types of boats is as follows:
 - Motor boats (75% of *all* boat owners own at least one motor boat): 71% of *motor* boat owners have a single motor boat, while 29% own multiple motor boats.
 - Sailboats (8% of all boat owners own at least one sailboat): 85% of sailboat owners have a single sailboat, while 15% own multiple sailboats.
 - Canoes (12% of all boat owners own at least one canoe): 85% of canoe owners have a single canoe, while 15% have multiple canoes.
 - Kayaks (14% of all boat owners own at least one kayak): 47% of kayak owners have a single kayak, 34% have two kayaks, and 20% have more than two kayaks.
 - The canoe/kayak breakdown among paddlers is shown. Just about half of paddlers—defined as those who most often use a canoe or kayak—own a canoe (47%), while about two-thirds of paddlers (67%) own a kayak. Obviously, some own both types of boats.
 - Hand-powered boats, other than canoes and kayaks (18% of all boat owners own at least one hand-powered boat other than a canoe or kayak): 80% of these owners have a single (other) hand-powered boat, while 20% have multiple boats of this type.
 - Personal watercraft (5% of all boat owners own at least one personal watercraft): 48% of personal watercraft owners have a single personal watercraft, 46% have two of them, and 6% have more than two personal watercraft.
- The survey asked boat owners to indicate which of the boats that they own they most often use: motor boat was, by far, the top answer among boaters overall (68%) (the next nearest was kayak with 8%).
 - There were notable regional differences on the type of boat used most often, with the South Central, Columbia Plateau, and Palouse Region having the highest rate of boaters saying their most-used boat was a motor boat. Kayak use was relatively high in the Peninsula and Coast Region, canoe use was relatively high in the East Northern Cascades and Northeast Region, and sailboat use was relatively high in the Islands, Seattle/King, and West Northern Cascades Region.

- The majority of boat owners (64%) most often use a boat from 16 to 25 feet in length. Only 10% most often use a boat of 26 feet or more.
 - Not surprisingly, non-registered boat owners generally had smaller boats compared to registered boat owners.
 - The Peninsula and Coast Region and the Islands, Seattle/King, and West Northern Cascades Region had more boaters whose most-used boat was 26 feet or more in length, when compared to the other regions.

- Nearly three-fourths (73%) of boat owners indicate that the boat they most often use is registered in Washington.

COUNTIES IN WHICH BOATS ARE REGISTERED, COUNTIES IN WHICH RESPONDENTS BOATED, AND PREFERRED BOATING LOCATIONS

- The survey asked boaters to name the county in which they boated the most days in the previous 2 years, and the leading county by far (more than double the next nearest county) was King County (18.4% boated the most days there), followed by Pierce (8.2%), Snohomish (6.6%), Clark (4.4%), and San Juan (4.3%). An analysis of where boaters boat the most days relative to the county in which they live found that 62% of boaters boat the most days in their county of residence. In the regional breakdown, the Islands, Seattle/King, and West Northern Cascades Region is the most popular region (41%), followed by the Southwest Region (24%).
 - In the crosstabulation of county in which the respondent boated the most days by the type of boat most often used:
 - King, Pierce, and Snohomish are the most boated counties among motor boaters.
 - King, San Juan, and Thurston are the most boated counties among sailboaters.
 - King, Snohomish, Spokane, and Kitsap are the most boated counties among paddlers.
 - King, Snohomish, Clark, and Pierce are the most boated counties among other hand-powered boat users.

- Among the counties of registration, King, Pierce, Spokane, and Snohomish lead the list.

- The survey asked boaters to name their most preferred county of boating: King County led the list (14.8%), followed by Pierce (7.0%), San Juan (5.7%), and Snohomish (5.6%). An analysis of responses regarding preferred county and responses regarding where boaters most often boat found that 82% of boaters boat the most in the county where they prefer to boat. In the regional breakdown, the Islands, Seattle/King, and West Northern Cascades Region is the most popular region (36%), followed by the Southwest Region (19%).
 - In the crosstabulation of county that the respondent most prefers by the type of boat most often used:
 - King, Pierce, and San Juan are the most preferred counties among motor boaters.
 - San Juan, King, and Thurston are the most preferred counties among sailboaters.
 - King, Snohomish, and Kitsap are the most preferred counties among paddlers.
 - King, Snohomish, Pierce and Thurston are the most preferred counties among other hand-powered boat users.

- The survey asked boaters to name the body of water in which they boated the most days in the previous 2 years: the Puget Sound led the list (25.0%), which was about twice the percentage naming any other body of water. Following the Puget Sound on the list was the Columbia River (12.7%), Lake Washington (8.7%), Lake Roosevelt (3.5%), and the Snake River (2.2%).
 - There are some marked differences in the body of water in which the respondent boated the most days when crosstabulated by the type of boater.
 - Among motor boaters, the Puget Sound, the Columbia River, Lake Roosevelt, Lake Washington, and the Snake River were the top bodies of water.
 - Among sailboaters, the Puget Sound, Lake Washington, the Columbia River, and the Strait of Juan de Fuca were the top bodies of water.
 - Among paddlers, the Puget Sound, the Columbia River, Lake Washington, and the Spokane River were the top bodies of water.
 - Among those who most often used a hand-powered boat other than canoe or kayak, the Puget Sound, Lake Washington, and the Columbia River were the top bodies of water.

- The survey asked boaters to name their preferred body of water on which to boat: the Puget Sound led the list (25.5%), followed by the Columbia River (11.2%), Lake Washington (6.5%), Lake Roosevelt (3.5%), the Snake River (2.3%), and the Strait of Juan de Fuca (2.2%).
 - There are some marked differences in the body of water in which the respondent prefers to boat when crosstabulated by the type of boater.
 - Among motor boaters, the Puget Sound, the Columbia River, and Lake Roosevelt were the most preferred bodies of water.
 - Among sailboaters, the Puget Sound (the top choice by far), Lake Washington, and the Columbia River were the most preferred bodies of water.
 - Among paddlers, the Puget Sound, the Columbia River, and the Spokane River were the most preferred bodies of water.
 - Among those who most often used a hand-powered boat other than canoe or kayak, the Puget Sound, Clear Lake, and the Columbia River were the most preferred bodies of water.

AVIDITY MEASURES

- Among all boaters, nearly half (46%) boated 10 days or less; nonetheless, nearly a quarter (23%) boated for more than 30 days per year.
 - In the mean days boated among various types of boaters, sailboaters were the most avid, closely followed by motor boaters. Those whose primary boating was in a large motor boat were more avid than those whose boating was in a smaller motor boat. Paddlers were the least avid, measured in days boated.

ACTIVITIES WHILE BOATING AND MOTIVATIONS FOR BOATING

- Fishing was the most common activity in which boaters participated while boating in Washington in the previous 2 years: 53% of boaters fished. Other common activities

included sight-seeing/fish and wildlife viewing (34%), water skiing (19%), relaxing or entertaining friends (17%), being with family and friends (17%), and water tubing (15%).

- There were some regional differences in the results to this question:
 - Fishing had the *lowest* rate in the Islands, Seattle/King, and West Northern Cascades Region.
 - Sight-seeing was the highest in the Islands, Seattle/King, and West Northern Cascades Region and the Peninsula and Coast Region.
 - Water tubing and water skiing were the highest in the South Central, Columbia Plateau, and Palouse Region and the East Northern Cascades and Northeast Region.
- There were some differences in the results to this question when crosstabulated by the type of boat most often used.
 - Fishing participation was highest among motor boaters and those using a hand-powered boat; it was *lowest* among sailboaters.
 - Sight-seeing was highest among sailboaters and paddlers.
 - Relaxing was highest among sailboaters.
- When asked to say what motivates them to boat, boaters most commonly answer for relaxation (49% gave this as a reason for boating), followed by to fish (29%), to be with friends and family (26%), for general recreation (14%), and to be close to nature (11%).
 - The most notable regional difference in the results to this question regarding the motivations for boating is that the Islands, Seattle/King, and West Northern Cascades Region has a low percentage of boaters who do so to fish; this region has a relatively high percentage who boat for relaxation.
 - There are large differences by boater type.
 - For relaxation as a motivation is higher among sailboaters and paddlers than among the other types of boaters.
 - To fish as a motivation is higher among operators of hand-powered boats and motor boats than among the other types of boaters.
 - To be with friends and family as a motivation is higher among motor boaters and sailboaters than among the other types of boaters.

- To be close to nature as a motivation to boat is higher among paddlers than among the other types of boaters.

CONSTRAINTS TO BOATING

- A majority of boaters overall (62%) indicated that there are things that take away from boating satisfaction or cause them not to boat as much as they would like.
- In follow-up to the question about things that take away from boating satisfaction or cause boaters not to boat as much as they would like, boaters most often cited cost of boating, work obligations, weather, lack of or poor access, crowding on the water, and family obligations.
 - The crosstabulation by boater type on the question about things that take away from boating satisfaction or cause boaters not to boat as much as they would like found some differences in the results.
 - Cost was cited more often by motor boaters than by any other type of boater.
 - Poor access was cited more often by paddlers and motor boaters than by the other types of boaters, but the differences were small.
 - Crowding on the water was rarely cited by sailboaters.
 - Crowding at boat launch ramps was higher among motor boaters than among any other type of boater.
- The survey specifically asked about crowding on the water. A majority of boaters (55%) say crowding is not a problem; however, 43% say that it is a problem, albeit, for most of them, just a minor problem. The survey also asked about crowding at the boat launch ramp where the boater boats most often, and crowding is more of a problem: only 25% say it is not a problem, while 64% say crowding at boat launch ramps is a problem, although most of those say *minor* problem rather than *major* problem.
 - Regionally, the Islands, Seattle/King, and West Northern Cascades Region has the highest percentage of boaters saying that crowding on the water is a problem. The Peninsula and Coast Region has the lowest percentage of boaters saying that crowding on the water is a problem. Regarding crowding at boat launch ramps, the Southwest Region

and the South Central, Columbia Plateau, and Palouse Region have the highest percentages of boaters saying that crowding at boat launch ramps is a problem.

- Sailboaters are less likely to say that crowding on the water is a problem, compared to the other types of boaters. Regarding crowding at boat launch ramps, motor boaters are the most likely to say it is a *major* problem; paddlers are the most likely to say it is *not* a problem; and sailboaters are the most likely to say that they do not know.

RATINGS OF STATE BOATING PROGRAMS, SERVICES, AND FACILITIES

Ratings of Programs, Facilities, and Services Overall

- The survey asked boaters to say how effective boating programs and services are in Washington at meeting the needs of recreational boaters. The positive news is that the majority of boaters (76%) said the programs and services are effective; however, *somewhat* effective led *very* effective by about 2 to 1. Only 6% said that programs and services are not at all effective.
- Those who said that boating programs and services in Washington are not at all effective were asked to give their reasoning. They most commonly said insufficient law enforcement presence, lack of awareness of the programs among boaters, lack of education requirements for boaters, poor boating access, and poor allocation of boating funding.
- A substantial percentage of boaters (42%) indicated that there are boating facilities or services in the county in which they boat most often that they would like to see improved. Additionally, 32% of boaters said that there are facilities or services that they would like to see built.
 - In the crosstabulation by type of boater, motor boaters were the most likely to say that there are facilities and services in the county in which they most often boat that they would like to see improved; paddlers were the least likely. Motor boaters were the most likely to say that there are facilities and services in the county in which they most often boat that they would like to see built; paddlers were the least likely.

- In follow-up, those who indicated that there are aspects of facilities or services that need to be improved were asked to name the aspects. Most commonly, they named boat launch ramps, distantly followed by restrooms at boat launch ramps, more public access, mooring buoys or docks, and parking areas at boat launch ramps.
 - There were some differences among the regions.
 - Boat launch ramps was named more often by Southwest Region boaters and Peninsula and Coast Region boaters than boaters from the other regions.
 - Marinas was mentioned more often by Peninsula and Coast Region boaters than by any other region's boaters.
 - There were some differences among the boater types.
 - Boat launch ramps was named more often by motor boaters than by any other type of boater.
 - Mooring buoys and docks was cited more often by sailboaters and motor boaters than by the other two types of boaters.
 - Marinas was cited more often by sailboaters than by any other type of boater.
 - Sanitary pump-outs and courtesy tie-ups were cited by sailboaters more often than by any other type of boater.

- In follow-up, those who indicated that there are facilities or services that need to be built were asked to name the facilities or services. Most commonly, they named boat launch ramps, distantly followed by mooring buoys or docks, more public access, restrooms at boat launch ramps, marinas, parking areas at boat launch ramps, and camping areas.
 - There were regional differences, with the most notable discussed below.
 - Boat launch ramps was named more often by Southwest Region and South Central, Columbia Plateau, and Palouse Region boaters.
 - Marinas was mentioned more often by Peninsula and Coast Region boaters than by any other boaters.
 - There were some differences among the boater types.
 - Boat launch ramps was named more often by motor boaters than by any other type of boater; sailboaters mentioned boat launch ramps the least.

- Mooring buoys and docks was cited more often by operators of hand-powered boats than by the other types of boaters.
- More public access was cited by paddlers more often than by any other type of boater.
- Restrooms at launch ramps was cited the *least* often by sailboaters relative to the other types of boaters.
- Marinas was cited more often by sailboaters than by any other type of boater.
- Camping areas was cited by paddlers much more often than by any other type of boater.
- Sanitary pump-outs and courtesy tie-ups were cited by sailboaters more often than by any other type of boater.

Programs, Services, and Facilities: Ratings of Importance, Performance, Amount of Resources Directed Toward Them, and Quality

- The survey asked respondents to rate the importance of 12 boating programs and services on a scale of 0 to 10, with 0 being “not at all important” and 10 being “extremely important” (note that “don’t know” answers were removed from the calculation of means). The results produced a ranking of programs and services, with access issues topping the ranking. Public access was the top answer (mean rating among all boaters of 8.64), closely followed by management of *existing* boat launch ramps in second place (mean of 8.33) and management of *existing* marinas in fourth place (mean of 7.86). Education was also high on the ranking (mean of 8.04), in third place, as was navigation aids (mean of 7.83), in fifth place. Note that development of *new* launch facilities is low on the ranking (development of new boat launch ramps was fourth from the last, and development of new marinas was next to last).
 - There were some notable regional differences in the rating of importance of programs and services.
 - Navigation aids were slightly *less* important to boaters of the East Northern Cascades and Northeast Region than to boaters from other regions.
 - The development of new boat launch ramps had the highest importance ratings in the Southwest Region and the South Central, Columbia Plateau, and Palouse Region.
 - In the crosstabulations by type of boat used most often, there are marked differences in ratings of importance of various boating programs and services.

- Motor boaters gave notably higher ratings (relative to the other types of boaters) for development of new boat launch ramps and for registration and titling. Also, they gave high ratings for the importance of navigation aids (along with sailboaters).
 - Sailboaters collectively gave a much higher mean rating for navigation aids relative to the other types of boaters.
 - Paddlers and those using mostly other hand-powered boats gave *low* importance ratings to navigation aids and development of new marinas. However, law enforcement is important to these two types of boaters, particularly among those using other hand-powered boats.
- The survey asked respondents to rate the performance of the same boating programs and services that they rated for importance above (on a scale of 0 to 10, where 0 was “a poor performance” and 10 was “an excellent performance”). Access issues were *not* at the top, as they were in importance ratings. This means that the issues thought to be the most important are not thought to be performed at a commensurate level. The top three programs and services were registration and titling (mean of 7.13), navigation aids (6.79), and provision of recreational boating opportunities (6.63). The development of new boat launch ramps and new marinas were the two items at the bottom of the ranking, with a markedly lower mean rating than the other programs and services.
- The most notable difference among the regions in the rating of performance of programs and services concerns navigation aids: boaters from the East Northern Cascades and Northeast gave a lower mean rating for navigation aids relative to boaters of all the other regions.
 - Performance ratings differed by boat type, with the notable differences discussed below.
 - Motor boaters and sailboaters gave higher ratings of the performance of registration and titling than did the other types of boaters.
 - Motor boaters and sailboaters gave higher ratings of the performance of navigation aids than did the other types of boaters.
- Again, using the same list of 12 programs and services, respondents were asked if more, the same, or less time and money should be directed towards each program or service. Public

access tops the list of items for which respondents said more time and money should be directed (60% of respondents said that more time and money should be directed toward public access), followed closely by education (56%) and development of *new* boat launches (54%)—the only three programs or services with a majority wanting *more* time and money spent on them. Interestingly, both boat launch questions (development of new boat launches and management of existing boat launches) garnered more boaters who want more time and money directed toward them than did the similar questions about marinas. On the bottom of the list were registration and titling, as well as administration.

- There were many marked differences among the three types of boaters regarding the amount of time and money that should be directed toward various boating programs and services.
 - Registered boat owners were more likely than were the other types of boaters to want more time and money spent on development of new boat launch ramps, management of existing boat launch ramps, and development of new marinas.
 - On the other hand, non-owners were more likely than were the other types of boaters to want more time and money spent on law enforcement.
- There are some regional differences in perceptions of whether more, the same amount, or less time and money should be directed toward various programs and services.
 - Relative to boaters from other regions, those from the Southwest Region and the South Central, Columbia Plateau, and Palouse Region have a greater likelihood to want more time and money directed toward development of new launch ramps and management of existing boat launch ramps.
 - Boaters from the East Northern Cascades and Northeast Region are less likely, relative to boaters from other regions, to say that more time and money should be directed toward development of new boat launch ramps, navigation aids, and development of new marinas.
- Differences emerged in the perception of the amount of time and money that should be directed to programs and services according to boat type.
 - Motor boaters want public access, launch ramps (both new and maintenance of existing), and education. Motor boaters have the greatest percentage, relative to other boater types, wanting more time and money directed toward development of new boat

- launch ramps, management of existing boat launch ramps, (with sailboaters) development of new marinas, and (again with sailboaters) management of existing marinas.
- Sailboaters want to see more education, public access, and development of new marinas and launch ramps—the top facilities and services of which they want more.
 - Paddlers’ desires include more education and public access especially, and also more boating opportunities.
 - Among those operating other hand-powered boats, education and public access lead the list of facilities and services of which they want more. Law enforcement for this group is near the top of the ranking, as well.
- The survey asked respondents to rate the quality of 16 facilities and services in the county in which they boat most often. In looking at excellent and good ratings—the two highest ratings—three facilities/services stand out with high ratings: law enforcement on the water (54% gave an excellent or good rating), docks (50%), and boat launch ramps (49%). On the other end of the scale, two facilities/services have high percentages rating them fair or poor—the two lowest ratings: restrooms at boat launch ramps (52% gave a fair or poor rating) and parking at boat launch ramps (49%).
- There were regional differences in the results. Only where notable differences occur are the results discussed below.
 - Marinas: The highest excellent or good ratings were in the Peninsula and Coast Region and the Islands, Seattle/King, and West Northern Cascades Region.
 - Boating safety courses: The highest excellent or good ratings were in the Peninsula and Coast Region and the Islands, Seattle/King, and West Northern Cascades Region.
 - Boat launch ramps: The highest excellent or good ratings were in the East Northern Cascades and Northeast Region and the South Central, Columbia Plateau, and Palouse Region.
 - Camp sites or refuge sites: The highest excellent or good ratings were in the East Northern Cascades and Northeast Region and the South Central, Columbia Plateau, and Palouse Region.

- Parking at boat launch ramps: The highest excellent or good ratings were in the South Central, Columbia Plateau, and Palouse Region and the East Northern Cascades and Northeast Region.
- Parking at marinas: The highest excellent or good ratings were in the South Central, Columbia Plateau, and Palouse Region.
- Courtesy tie-ups: The highest excellent or good ratings were in the South Central, Columbia Plateau, and Palouse Region and the East Northern Cascades and Northeast Region.
- Restrooms at boat launch ramps: The highest excellent or good ratings were in the South Central, Columbia Plateau, and Palouse Region and the East Northern Cascades and Northeast Region.
- There were differences in the results according to the type of primary boat used by respondents.
 - In general, sailboaters were more generous than other types of boaters in giving excellent ratings, particularly for law enforcement, boat launch ramps, parking at boat launch ramps, boating safety courses, information and publications on boating launch ramps and marinas, marinas themselves, restrooms at marinas, and parking at marinas.
 - Motor boaters had a high percentage, relative to other boaters, giving a rating of poor for the quality of fish cleaning stations, courtesy tie-ups, mooring buoys, boat launch ramps themselves, pumpout stations, docks, and dump stations.
- The survey asked respondents whether they would like to have more, the same amount, or less of the facilities and services in their county. These are the same 16 facilities and services that respondents previously rated for quality. Seven facilities or services had nearly half or slightly more than half of respondents saying more were needed, with the top five of them used by those who tow their boats from place to place and who do not appear to have their own permanent dock and slip. These top five are parking at boat launch ramps, boat launch ramps themselves, courtesy tie-ups, restrooms at launch ramps, and docks. Note that

facilities pertaining to marinas are low on the list, including marinas themselves, restrooms at marinas, and parking at marinas. Also low are pumpout stations and dump stations.

- There were many differences among the regions on this series of questions about whether boaters would like to see more, the same, or less of the various facilities and services. Some of the notable differences are discussed below.
 - Parking at boat launch ramps varied greatly among the regions, with boaters from the Southwest Region having the highest percentage wanting more parking at boat launch ramps.
 - Regarding the boat launch ramps themselves, boaters from the Southwest Region and from the South Central, Columbia Plateau, and Palouse Region had a greater likelihood to want more of them than did boaters from the other regions.
 - Similar to above, boaters from the Southwest Region and from the South Central, Columbia Plateau, and Palouse Region had a greater likelihood to want more docks and more mooring buoys than did boaters from the other regions.
 - Boaters from the Southwest Region and from the South Central, Columbia Plateau, and Palouse Region also wanted more camp sites and refuge sites than did boaters from the other regions.
 - The East Northern Cascades and Northeast Region had the *lowest* percentage, relative to the other regions, of boaters wanting more parking at boat launch ramps, parking at marinas, marinas themselves, and pumpout stations.
 - Boaters from the South Central, Columbia Plateau, and Palouse Region had a *low* percentage wanting more parking at marinas (only boaters from the East Northern Cascades and Northeast Region had a lower demand for more parking at marinas).
 - Boaters from the Islands, Seattle/King, and West Northern Cascades Region had the *lowest* percentage of all the regions wanting more fish cleaning stations.
- The crosstabulation of amount of desired facilities and services by type of boat most often used found major differences between the different types of boaters.
 - Among motor boaters, four facilities/services have a majority wanting more of them: boat launch ramps, docks, parking at boat launch ramps, and courtesy tie-ups. Marinas and associated facilities/services are low on the ranking for motor boaters.

- Among sailboaters, courtesy tie-ups and mooring buoys top the list of facilities/ services of which they want more. Marinas take precedence over boat launch ramps among sailboaters. Education is important to this group, as well, as evidenced by nearly half wanting more boating safety courses in their county.
- Among paddlers, more camp sites and refuge sites tops the list, followed by boating safety courses, boat launch ramps and restrooms therein, and information and publications on boat launch ramps and marinas.
- Among those operating other hand-powered craft, a majority want to see more boat launch ramps, boating safety courses, and restrooms and parking at boat launch ramps.

Registration of Boats

- Ratings of the process of registering boats in Washington are mostly positive: the overwhelming majority of those who registered a boat in Washington (83%) describe the process as excellent or good, and only 2% rate it as poor.
- Boaters who registered a boat were also asked to name any aspects about the registration process that they would like to see improved. A majority (59%) said that nothing needs improvement. Otherwise, the most common complaints were cost (18%) and the timeliness of the registration process (4%)—having multi-year registrations, having registrations of boat and trailer at the same time, or some other aspect of the timing of registrations.

Access and Crowding

- The survey specifically asked about crowding on the water. A majority of boaters (55%) say crowding is not a problem; however, 43% say that it is a problem, albeit, for most of them, just a minor problem. The survey also asked about crowding at the boat launch ramp where the boater boats most often, and crowding is more of a problem: only 25% say it is not a problem, while 64% say crowding at boat launch ramps is a problem, although most of those say *minor* problem rather than *major* problem.

- Boaters overall are satisfied with the locations of boat launch ramps in the county in which they boat most often: 76% of them are satisfied (29% *very* satisfied, and 47% *moderately* satisfied). Only 10% expressed dissatisfaction.
- Boaters overall are satisfied with the locations of mooring buoys in the county in which they boat most often: 45% of them are satisfied (12% *very* satisfied, and 33% *moderately* satisfied), much more than the percentage who expressed dissatisfaction (12%). Note that the relatively low rate of satisfaction—less than a majority—is because a relatively large percentage (34%) did not know how to rate their satisfaction with mooring buoys or gave a neutral answer.

INFORMATION ABOUT BOATING IN WASHINGTON

- Boaters are most interested in access information on boat launch ramp sites and marina locations, maps and charts, boating safety, boating rules and regulations, fishing information, wildlife information, and State boating programs. In follow-up, boaters most commonly said that their preferred way to receive information on boating would be direct mail or the Internet.

DEMOGRAPHIC DATA

- About two-thirds (66%) of boaters overall are male, while 34% are female.
 - Registered boat owners are predominantly male, but non-registered boat owners and non-owners are more evenly split regarding gender.
 - Males predominate among motor boaters and sailboaters, while a more even gender distribution occurs among the other types of boaters.
- Regarding the ages of boaters, the older age groups—those consisting of boaters 45 years old or older—predominate. The mean age is 50.6 years.
 - Registered boat owners are slightly older, in general, than non-registered boat owners and non-owners, the latter group being the youngest.
 - Sailboaters tend to be older than the other three types of boaters. Motor boaters tend to be older than the remaining two types of boaters.

- The mean number of years of residency of boaters is 35.9 years. Overall, boaters tend to have a fairly long residency in the state.
 - Registered boat owners have slightly longer residency, in general, compared to non-registered boat owners and non-owners.
 - The Peninsula/Coast Region and the Islands, Seattle/King, and West Northern Cascades Region tend to have boaters with fewer years of residency in Washington State, compared to the other regions.
 - Paddlers tend to have fewer years of residency, compared to the other types of boaters.

- In the results regarding counties of residency of boaters, King County leads all other counties, followed by Pierce, Snohomish, Spokane, Kitsap, and Clark.

- The majority of households of boaters (67%) consist of two people. The majority of households of boaters (59%) contain *no* children 17 years of age or younger, while 36% contain at least one child.
 - Non-owners, compared to registered boat owners and non-registered boat owners, have smaller households, in general. Additionally, a lower percentage of non-owners, relative to registered boat owners and non-registered boat owners, have children living in their household.
 - The number of people in the respondent's household varies only slightly by boater type, with those who most often operate a hand-powered boat other than canoe or kayak being the most likely to live alone. Sailboaters are the least likely to have children living at home.

- Regarding education levels of boaters: 75% have at least some college or trade school coursework, and 44% have a Bachelor's degree (with or without a higher degree also).
 - Sailboaters and paddlers are much more likely to have degrees than are the other types of boaters.

- Regarding incomes of boaters, 47% have a pre-tax household income of \$50,000 or more.
 - There are slightly higher incomes in the Islands, Seattle/King, and West Northern Cascades Region, compared to the other regions.

BOATING SERVICES PROVIDERS SURVEY RESULTS

RATINGS OF STATE BOATING PROGRAMS, SERVICES, AND FACILITIES

Ratings of Programs and Services Overall

- Boating service providers gave fairly positive ratings of the effectiveness of boating programs and services in their service area at meeting the needs of recreational boaters: 93% rated them effective. However, by more than 2:1, they rated them *somewhat* effective over *very* effective.
 - Most commonly, those who feel that boating programs and services are not at all effective attribute this to either insufficient knowledge and awareness of boating programs and services or inadequate structures and facilities for boating programs and services.

Boating Programs, Services, and Facilities: Ratings of Importance, Performance, Amount of Resources Directed Toward Them, Quality, and Availability

- The survey asked boating service providers to rate the importance of 15 boating programs and services in the provider's area of service. Note that all were fairly highly rated—the lowest having a mean of 6.40, well above the midpoint of 5. Highly rated were boating safety (mean rating of 9.40), public access (8.98), provision of recreational boating opportunities (8.81), and education (8.74). The lowest rated were development of new marinas (6.40), development of new boat launch ramps (7.38), and administration (7.42).
- The survey asked boating service providers to rate the performance of the same 15 programs and services. All were positively rated, with means ranging from 6.14 to 7.36, with two exceptions: the development of new marinas (mean rating of 3.63) and the development of new boat launch ramps (4.20) had very low ratings. Note that navigation aids topped the ranking.
- The survey then asked boating service providers to indicate whether more or less time and money should be spent on the same 15 programs and services. Demand for programs and services is high, as 9 of the 15 programs/services had a majority of providers saying that more time and money should be spent on it. Leading the list are boater safety (74% say more

time and money should be spent on it), education (71%), public access (70%), and development of new boat launch ramps (70%). Note that 4 of the 15 programs/services had relatively low demand: administration (23% want more time and money spent on this), registration and titling (29%), management of existing marinas (32%), and navigation aids (36%).

- Boating service providers rated the quality of 16 boating facilities and services in their area of service in Washington.
 - There were 6 facilities and services that were notably better rated than the other facilities and services: marinas (55% rated them excellent or good), boating safety courses (54%), law enforcement on the water (52%), information and publications on boat launch ramps and marinas (52%), docks (51%), and restrooms at marinas (47%).
 - On the other hand, those facilities and services with high percentages rating them fair or poor include parking at boat launch ramps (69% rated it fair or poor), restrooms at boat launch ramps (63%), boat launch ramps themselves (55%), courtesy tie-ups (54%), pumpout stations (51%), and fish cleaning stations (51%)—all with a majority giving a rating of fair or poor.

- The survey asked boating service providers to indicate whether they want more or fewer of the same 16 facilities or services that they previously rated for quality.
 - Note that 11 of the 16 facilities or services had a majority of boating providers who want more of them. At the top of the list are parking at boat launch ramps (72% want more of this), boat launch ramps themselves (69%), boating safety courses (68%), and law enforcement on the water (66%). At the bottom of the list is restrooms at marinas (36%).

- After the series of question discussed immediately above, the survey asked boating service providers if there are any other facilities or services in their service area that they would like

to see built. A majority (59%) indicated that there were other facilities or services in their service area that they would like to see built.

- The most commonly mentioned things that they said they wanted to see built were boat launch ramps, marinas, mooring buoys and docks, public access, restrooms at marinas, sanitary pumpouts, and restrooms at boat launch ramps.
- The survey asked boating service providers whether there were any facilities or services in their area that they would like to see improved. A majority (66%) answered yes. In follow-up, they most commonly mentioned boat launch ramps (by far the top answer), mooring buoys and docks, and parking at boat launch ramps and marinas.

Issues Associated with Boating Programs, Services, and Facilities

- Pollution and water quality were most commonly named in response to the question about what are the most important environmental issues related to recreational boating. Also with many responses was the habitat impact of recreational boating.

Boating Access Locations and Crowding

- The majority of boating service providers (71%) are satisfied with the locations of boat launch ramp sites in their service area, but a substantial percentage (19%) are dissatisfied.
- Compared to the previous question, satisfaction is not as high for the locations of mooring buoys in the respondent's service area: 48% are satisfied, while 18% are dissatisfied (the remainder answering, "Don't know," or giving a neutral answer).
- Boating service providers were asked how much of a problem is crowding on the water in their service area, and the majority (63%) say it is a problem, but with most of those saying *minor* problem.
- Boating service providers were asked how much of a problem is crowding at boat launch ramps in their service area, and the overwhelming majority (85%) say it is a problem, about evenly divided between saying *major* problem and *minor* problem.

Organizational Structure of Boating Programs and Services

- Satisfaction among boating service providers is high with the current structure of boating programs and services management in Washington: 75% are satisfied, while 16% are dissatisfied. However, most satisfaction is *moderate*.

- The majority of boating service providers (63%) agree that there should be a single state agency or organization that is responsible for boating programs and services in Washington.

INFORMATION ABOUT BOATING IN WASHINGTON

- Boating service providers were asked to name the types of information on boating that they provide for recreational boaters. Seven types of information were commonly mentioned: boating rules and regulations, information on access at launch ramps and marinas, information on Washington boating programs, information on boating safety courses, maps and charts, fishing information, and wildlife information.

- In a related question, the survey asked about the mediums used for providing information. The Internet was most commonly named, followed by information made available through license agents and at sporting goods stores and marinas; brochures, pamphlets, and handouts; and direct mail.

IMPLICATIONS AND RECOMMENDATIONS

CONSIDER THIS ASSESSMENT DATA AND BALANCE NEEDS

This assessment provides a large amount of data regarding the needs of a diverse range of groups involved with recreational boating in Washington. The breadth of this needs assessment necessitates a careful review and evaluation of the data before important decisions are made. From providers of programs and services essential to boating (including the operators of sites and facilities as well as law enforcement personnel representing numerous agencies) to the boaters themselves (including the operators of motorboats, sailboats, paddlers, and personal watercraft, among others), a substantial range of interests is represented in the results of the study. It is recommended that future policies be developed by carefully balancing the needs of the various groups and by focusing on the findings within this report. With this in mind, the data suggest that the following recommendations should be considered, categorized into 11 topic areas.

1. LACK OF FUNDING

There is a clear, immediate need for additional funding for boating programs and services in Washington. In the survey and focus groups of boating providers, lack of resources for boater safety, access, launch ramps and facilities, law enforcement, and education were the top priorities in meeting the needs of boaters in Washington. In the survey of boaters, large majorities of boaters indicated needs for increased law enforcement and education, as well as for additions and improvements to boating facilities. These included access, launch ramps, parking at launch ramps, and improved docks, restrooms, fish cleaning stations, and other features currently in disrepair. As Washington's population and the number of boaters in the state continue to grow, the lack of resources to meet the demands for boating programs and services will only become more pronounced.

Inadequate funding for boating programs and services in Washington manifests itself in several ways, the first and most important of which is in boating safety. Washington in recent years has ranked in the top tier of states in boating-related fatalities per 100,000 registered boats. In 2006,

there were 96 boating-related accidents and 21 boating-related fatalities in Washington.¹ Additional resources for an improved law enforcement presence as well as the dissemination of safety education (through courses, publications, etc.) will very likely reduce the number of boating-related fatalities.² In short, additional funding for boating programs in Washington would save lives.

Inadequate funding of recreational boating programs and services also manifests itself in the economy of the State. It is estimated that recreational boaters contribute nearly \$100 million each year directly to the economy of the State through vessel registration fees, watercraft excise taxes, vessel sales taxes, gas taxes, fishing licenses, grants and assistance from the federal government, and other miscellaneous fees.³ However, the indirect financial contribution to the State from recreational boating can be understood as a much larger figure after taking into account the “ripple effect” of Washington’s boating industry.⁴ It follows that increased funding for recreational boating would only enhance this major economic contribution to the State; indeed, increasing funding support for Washington’s boating programs and services ought to be viewed as an investment in the State’s economy.

Finally, inadequate funding for boating programs and services in Washington reduces the quality of the boating experience for Washington boaters. Another study has estimated that between 350,000 and 400,000 Washington residents of all ages boat for recreation, either owning a boat directly, renting or chartering a boat, or accompanying friends and family on a boat.⁵ It would be remiss not to reinvest the funds that are generated from boating back to these constituents, especially when numerous needs for improvements to boating programs and services currently exist among the State’s boaters.

¹ Source: 2006 U.S. Coast Guard Boating Statistics Report.

² Source: *Recreational Boating Safety in Washington: A Report on Methods to Achieve Safer Boating Practices*, Washington State Parks and Recreation Commission, 2003.

³ Source: M. Campbell and S. Greaves, Northwest Marine Trade Association.

⁴ Southwick Associates’ explanation of multiplier relationships between industries is particularly useful in this context: Once a boater makes a purchase, the retailer buys more merchandise from wholesalers, which buy more from manufacturers, which, in turn, purchase new inputs and supplies. In addition, the salaries and wages paid by these businesses stimulate more benefits: the first purchase creates numerous rounds of purchasing, generating substantial economic benefit to the state. [Source: Southwick Associates]

⁵ Beckwith Associates, statewide recreation participation survey, results published in *An Assessment of Outdoor Recreation in Washington State*, IAC, 2002.

2. ADDITIONAL AND ALTERNATIVE SOURCES OF FUNDING

In order to meet some of the numerous recreational boating needs identified in this assessment, additional funding will be required. It is recommended that a study be undertaken to examine potential funding alternatives, starting with a review of the analysis of tax preferences by the legislative commission that was formed to study tax preferences in Washington State.

Though the issue of alternative funding warrants significant additional examination, the assessment identified—particularly through the focus groups of boating providers—several preliminary possibilities for funding the needs of the State’s boaters. One option is for a larger share of the State’s general fund; with boaters contributing nearly \$100 million to the State annually in taxes and fees, it would seem reasonable for the State to reinvest a greater share of this money with the boating community.

Several issues connected to taxes and user-based fees paid by Washington boaters prevent these from constituting more viable funding sources for recreational boating. For example, boat operators in Washington pay a tax on fuel, the proceeds from which are then placed in the State’s Motor Vehicle Fund. But a cap on the amount returned from this fund to recreational boating means that boating grant money is roughly 40% less than some believe it should be. (As mentioned previously, the issue has been studied by a legislative commission on tax preferences.) In addition, a number of boating providers discussed user-based fees as a possible means of funding programs and services (particularly maintenance of access sites). However, as with the fuel tax, proceeds from user-based fees are not always funneled back into recreational boating. Alternatively, the user fees themselves may not be adequate sources of funding to begin with. (On this point, several boating providers referred to an annual \$10 launch ramp parking fee which was deemed insufficient to cover the costs of necessary access maintenance.)

In the focus groups, a number of boating providers suggested that Washington consider the mandatory registration of all watercraft in the State (the current policy allows boats under 16 feet with less than 10 horsepower that are not used on navigable waters to remain unregistered). According to the US Coast Guard, at least four states (North Dakota, Ohio, Oklahoma, and South Carolina) and the District of Columbia currently require all watercraft to be registered. In

exploring the feasibility of mandatory boat registration, it should be noted that several practical reasons support such a measure. First, based on the results of the survey of Washington boaters, unregistered boats comprise at least one-quarter (25%) of the fleet. Providers noted that unregistered boats utilize many of the same resources as registered boats, including launch ramps, law enforcement services, campsites, and moorage space, as well as many other things. Further, several boating providers referred to the difficulties faced by enforcement personnel charged with investigating the theft of unregistered boats (in which case verifying the theft is virtually impossible). Finally, it should be noted that 44% of boating fatalities in Washington occur in non-powered boats (it is highly likely that such non-powered boats are unregistered).⁶

Requiring the mandatory registration of all watercraft could prove to be an important step in receiving additional funds to meet the growing needs of Washington's boating constituents.

3. BOATER SAFETY

Among providers, boater safety was the top rated program or service, as well as being the top area in which providers would like to direct more time and money. Washington's current boating safety statistics suggest room for improvement: as previously mentioned, the State has recently ranked relatively high in boating fatalities per 100,000 registered boats. In the focus groups, boating providers expressed considerable support for the mandatory boater education legislation enacted in 2005; however, the now-required boater education, a significant step towards improving boating safety, should be viewed as merely a starting point for improving overall boater safety in the State. As previously mentioned, boater safety is to some extent dependent upon funding: with adequate support, agencies in Washington involved in enforcement of boating laws and regulations will be able to provide an enforcement presence sufficient for the consistent performance of safety checks, enforcement of alcohol- and drug-related boating laws, provision of on-site safety information and practical education to boaters, and the continued reduction of boating accidents and fatalities in Washington.

⁶ Source: *Recreational Boating Safety in Washington: A Report on Methods to Achieve Safer Boating Practices*, Washington State Parks and Recreation Commission, 2003.

4. BOATING ACCESS

Providers and boaters alike consider access to be one of the central needs affecting recreational boating in Washington. The most important issue related to access is the need for additional or improved boat launches: 72% of boaters who indicated that access issues had taken away from their boating satisfaction cited boat launch ramps as the specific reason. Similarly, majorities of boating providers indicated that more time and money should be directed toward public access (70%), including the development of new boat launch ramps (70%) and the management of existing boat launch ramps (55%). Over two-thirds of providers (69%) said they would like to see more boat launch ramps in their areas in Washington.

The data suggest that boaters are generally satisfied with the location of existing boat launches: 76% indicated being satisfied with the location of launch ramps in the counties in which they boat most often. Similarly, boater frustration with crowding on the water is not nearly as pervasive an issue as frustration with crowding at boat launch ramps: 24% of boaters consider crowding at boat launch ramps to be a major problem, compared with just 10% of boaters who consider crowding on the water to be a major problem (among boating providers, 45% believe crowding at boat launch ramps to be a major problem). At the same time, boaters gave poor mean ratings to Washington's management of existing boat launch ramps (6.15 on a scale of 0 to 10) as well as to the development of new boat launch ramps (4.45 on a scale of 0 to 10), suggesting that efforts to improve access limitations at launches have been inadequate.

Exacerbating the issue of overcrowding at launch ramps is a growing need for improvements to parking at launch ramps and access sites (essentially a second aspect of overcrowding). The survey results indicate that inadequate parking is recognized by both providers and boaters as being a major deterrent to boating in Washington: 72% of providers and 55% of boaters would like to see more parking at boat launch ramps (the top rated item of services the groups would like to see more of in their respective areas).

The survey results illustrate the highest priority locations for additional or improved boat launches, with the majority of these corresponding with the counties and bodies of water most frequented by boaters. Again, the implication of these findings suggests that while boaters are

generally satisfied with the locations they choose for boating, their experiences could be greatly improved if the problem of access were to be alleviated. The primary means of doing so would be the development of new access sites or maintenance and/or expansion of existing access sites; both areas are discussed below.

5. LAUNCHES AND FACILITY UPKEEP

As stated above, the improvement of access is by far the most pressing need for Washington boaters. However, the data reflect that both providers and boaters feel strongly that the maintenance of existing access sites and launch ramps is as important a concern as the development of new sites and launch ramps; indeed, management of existing ramps ranked ahead of the development of new launch ramps in the majority of importance ratings in the surveys of both providers as well as boaters.

Upkeep and maintenance extend beyond improvements to the launch ramps themselves. In the survey, boaters indicated that restrooms at boat launch ramps (22%) and parking at launch ramps (21%) are in poor condition, while the top facilities and services cited by providers as being in poor condition in their areas were parking at launch ramps (35%), fishing cleaning stations (26%), restrooms at launch ramps (25%), mooring buoys (24%), pumpout stations (22%), and dump stations (20%). Among the facilities and services boaters would like to see improved in the areas in which they most often boat, launch ramps (45%) top the list, followed by restrooms at launch ramps (19%), mooring buoys or docks (16%), and daytime parking areas (15%).

In the focus groups, providers blamed the RCO's grant process as being partly responsible for the general lack of facility maintenance in Washington. The providers' perceptions were that the RCO's selection of projects for funding favored the development of new sites and launch ramps over facility maintenance; in short, they believe that funds for maintenance of facilities are simply not available from the RCO (see the discussion on providers' perceptions under "RCO Grant Process" below). Although these focus group participants are perhaps demonstrating a lack of understanding about the types of available funding and legislative mandates on how various funds are spent (e.g., funding for capital improvements versus funding for maintenance and operation), the bottom line for them is that they want to see more maintenance funding

available. (Perhaps there is an outreach opportunity here to inform boating service providers of potential sources of maintenance funding.) Again, it cannot be overstated that upkeep, maintenance, and efforts to improve existing access sites and increase their capacity, especially boat launch ramps and their adjoining parking areas, are important means of facilitating access in Washington.

6. LAUNCHES AND FACILITY DEVELOPMENT

Whether the needs are satisfied by adding to existing access sites or developing new ones, there are numerous facilities and services that both boaters and providers would like to see more of in their respective areas. Parking at launch ramps (72%) and launch ramps themselves (69%) were the top items providers would like to see more of, followed by docks (63%), pumpout stations (63%), restrooms at launch ramps (62%), courtesy tie-ups (62%), dump stations (58%), mooring buoys (53%), and campsites (52%).

In addition to boat launch ramps (at 48%, by far the top need), boaters would particularly like to see mooring and docks (23%) and restrooms at launch ramps (17%) built in the counties in which they most often boat. Parking at launch ramps (55%) and launch ramps themselves (54%) are the top facilities and services boaters would like to see more of in the counties in which they most often boat; following these, boaters would like to see more courtesy tie-ups (51%), restrooms at boat launch ramps (50%), docks (50%), and campsites (50%).

Note that, in general, the only instance of both providers and boaters ranking the development of new boat launch ramps ahead of the management of existing boat launch ramps was when the two groups were asked about areas in which to direct more time and money: among boaters, 54% said that more time and money should be directed towards new development, compared to 47% in favor of more time and money toward management of existing ramps; similarly, 70% of providers said that more time and money should be directed towards new development, compared to 55% in favor of more time and money toward management of existing ramps. This may be due to the perception, at least among boaters, that maintenance is an assumed part of the boating budget, and that *additional* time and money should be directed at new development; note

that in virtually all other rankings in the two surveys, management of existing boat launch ramps topped the development of new launch ramps in terms of importance.

The data suggest that providers are, to some extent, skeptical about the development of new access and boat launch ramps due to the difficulties in locating and purchasing property in Washington on which to develop water access. Many of the focus group participants cited pressure from homeowners' associations for boaters to avoid private waterfront property, leading to a gradual decline in available public access. According to providers, environmental regulations in Washington constitute a further hindrance to the development of new access sites and ramps. Many providers viewed as frustrating the process of applying for necessary environmental permits and adhering to ecological protocols while developing on the water; it was also noted that boating interests have not consolidated into a lobbying group sufficient to counter environmental interests in opposition to new development. For these reasons, the development of new access facilities and launch ramps should be carefully balanced with the maintenance of existing sites and ramps.

7. AGENCY ADMINISTRATION AND COORDINATION OF BOATING IN WASHINGTON

The Revised Code of Washington directs the State Parks and Recreation Commission to administer the state's boating safety program and gives the Commission primary responsibility in many boating-related efforts, but there are multiple entities administering various aspects of boating and boating-related programs and services in Washington.

- The State Parks and Recreation Commission and all local county sheriff's offices and police departments are charged with the enforcement of boating regulations, boater safety, and numerous environmental mandates, such as those pertaining to the administration of boat sewage pumpout grants and boater environmental education.
- The Department of Fish and Wildlife enforces fishing laws and environmental regulations including those related to invasive species (by legislative mandate). Note that it plays a role in enforcement of boating laws simply because its officers are on the water in the performance of their duties (not mandated, but a role that became necessary simply because a game officer *not* enforcing an apparent boating violation when he is checking

for fishing licenses, for instance, makes the boater perceive that the boating violation is unimportant).

- The Department of Natural Resources manages aquatic lands and invasive species and salmon recovery programs.
- The RCO administers the marine motor fuel tax access grant program and assists in salmon recovery.
- The Department of Ecology provides water quality administration, including personnel to respond to oil spills.
- The Department of Licensing oversees the registration of boats.
- The Department of Revenue is responsible for boat excise taxation.

This multiple-agency involvement may have led to the perception among both providers and various agency employees that boating services and boating programs are fragmented. For instance, state agency employees whose responsibilities include law enforcement on both the land *and* water in Washington stated that enforcement emphasis was often inadequately divided between the two areas—terrestrial and water. It was also acknowledged that the administration of boater safety in the field (such as patrols, safety and PFD checks, the enforcement of laws and regulations) is frequently performed by multiple entities that are not always in adequate communication with one another. Furthermore, there was discussion in the provider focus groups about the lack of consistency in carrying out boating programs and the possibility of consolidating boating programs, and in the provider survey, two-thirds of boating service providers indicated that one state agency or organization, instead of multiple agencies, should be responsible for boating programs and services in the state.

It is interesting to note that, for their part, boaters did not view the administration of boating and boating-related programs by multiple agencies as a major problem. Nonetheless, they have the perception that there could be better coordination. For instance, whether the perception is correct or not, they indicated that the lack of enough access sites and launch ramps is partly a result of poor administrative coordination.

Although better coordination and communication among boating stakeholders has been and is fostered through the State Parks and Recreation Commission's Boating Safety Council, there is still some perception in Washington that boating services are fragmented. There may be need for an *interagency* coordinating body (the Council has no state agency members outside of the State Parks and Recreation Commission—who are non-voting). Certainly, the assessment results suggest that both the *perception* of piecemeal delivery, as well as the actual piecemeal delivery where it exists, be addressed.

It may be that this requires changes to the actual way that some boating services are provided, or it may be that better communication among agency personnel and better communication to providers and boaters would adequately address the problem. (As an example that pertains to this communication problem, see the discussion about a single website in the section later in the text titled “Increase Information and Education Programs.”) Nonetheless, because there was feelings among some boaters and many boating services providers that a single agency is needed, it may be that Washington's boating programs could be better served if a multi-agency coordinating body were established consisting of all agencies involved in administering and providing boating services. While governmental responsibilities pertaining to boating are delineated in the Revised Code of Washington (and Washington Administrative Code that sets forth the specific ways the code is administered), the coordination among the agencies involved was seen as a problem among boating stakeholders. A coordinating body, if it helps improve the delivery of services, could become a permanent part of the structure of the administration of boating services in Washington. If, however, coordination problems persist, the suggestion of many boating stakeholders that a “State of Washington Department of Boating” be created could be explored.

8. INCREASE LAW ENFORCEMENT PRESENCE AND ENSURE THAT ALL LAW ENFORCEMENT OFFICERS RECEIVE STANDARDIZED TRAINING

While boater safety and law enforcement had high ratings of importance among providers (with safety being ranked consistently as the top area for importance), majorities of boating providers indicated that more time and money should be directed to them. Further, the majority of all providers (both survey respondents and focus group participants) would like to see an increase in the law enforcement presence on Washington's waters. As mentioned previously, it is generally

accepted that an increased level of law enforcement personnel on the water corresponds with a general decline in boating accidents and fatalities. Among boaters who consider boating programs and services in Washington to be ineffective, the top reason cited (34%) is insufficient law enforcement presence on the water.

The focus groups identified several issues affecting the staffing of enforcement personnel in Washington. Funding was repeatedly cited as an overarching issue, while other participants stated that general understaffing of enforcement personnel frequently led to employees working overtime, thereby reducing their energy levels and overall effectiveness in carrying out enforcement activities. A second issue connected to staffing concerned employees rotating in and out of jobs within agencies or across counties; as an example, it was noted that a county employee well-trained in the environmental issues of one area would not necessarily possess the knowledge required in another area that placed a high emphasis on boating safety patrols.

As a result of the turnover of and transfers within enforcement staffing in many counties, many providers indicated that enforcement officers are not always adequately trained in boating enforcement. While the state's training programs and protocols for boating law enforcement are standardized (for instance, they meet U.S. Coast Guard requirements), many providers expressed the need for coordinated and consistent training of officers in order to maintain a knowledgeable staff equipped to respond to an array of enforcement issues. This appears to be an issue of providing all officers with the *opportunity* to receive training—some are put into enforcement duties before they have had all the training they may wish they had—not with the training programs themselves, which are standardized, despite focus group participants' perceptions to the contrary. In discussions with stakeholders, the researchers found that boating accident investigation is an example of where officers' actually may be, of necessity, put into situations prior to their having received training in investigating boating accidents. Bettering the *opportunities* for law enforcement officers to receive training would be a vital step toward the larger objective of reinforcing boater safety on the waters.

9. INCREASE INFORMATION AND EDUCATION PROGRAMS

In general, the development of boating information and education programs should be treated as an ongoing process of providing boaters beneficial information, with mandatory boater safety education serving as the beginning. More than half of providers (52%) indicated that more time and money should be spent on the provision of information and publications. It is instructive to remember that boater safety was the top rated issue of importance among providers; in that sense, safety on Washington's waters is likely to improve following the increased exposure of boaters to information on boat operation, the environmental effects of boating, navigation practices, and the regulations governing recreation on the State's waters, as well as information on safety.

By all accounts, the State Parks and Recreation Commission effectively manages the production of informational materials related to boating. However, multiple agencies are involved—whether legislatively mandated to do so or not—in the actual dissemination of boating information. For this reason, it is recommended that boating information be available at various points in the field, including through contact with enforcement personnel. There were two recurring suggestions in the focus groups for a more efficient delivery of boating information. The first was a centralized website, with frequent updates and the ability for agencies to add or edit information as necessary. In discussions with stakeholders, the researchers learned that such a website was discussed, with preliminary designs produced, in Washington in recent years, but that the site did not meet state standards for a “.gov” domain name (the “.gov” part of the domain name is considered essential for the public's perception of credibility). A single, comprehensive state boating website with a “.gov” domain name should again be explored to better serve the public's need for one authoritative and credible source of information on boating in the state, boating regulations, and state boating programs.

The second recurring suggestion in the focus groups was for making a greater amount of boating information available at the sites of recreation, such as at boat ramps and marinas on the water. Safety information, in particular, should be made available in a variety of formats, including pamphlets and handouts (kiosks were cited as a potentially effective method of providing boaters with information—many providers noted that the need for information among boaters is greatest

in the field, and not in a classroom). Agency-sponsored campaigns may target the most important issues in terms of boater needs; the assessment indicated that boaters are most interested in receiving information on ramps and marinas (34%), maps and charts (32%), general safety (32%), boating rules and regulations (32%), fishing (27%), wildlife (22%), and boating programs in Washington (22%).

Information and education efforts should be evaluated periodically through surveys of boater knowledge and evaluated through boating accident statistics.

10. RCO GRANT PROCESS

It is recommended that the RCO use the results of this study to set priorities for the Boating Facilities Program and Boating Activities Program. The information in this report—particularly the data on improvement priorities and the preferred locations for service additions—is presented to assist the RCO in its decision-making and review of proposals.

There is a problem in that boating services providers do not always understand that the RCO is constrained by state law from using capital funds for maintenance. This results in the oversimplified belief among providers that the RCO favors building new facilities over projects designed to perform maintenance, upkeep, or other improvements to existing access sites and launch ramps. As stated above in the discussions on access issues, there is a clear unmet need in Washington for improved boat launch ramps and parking opportunities, as well as numerous other repairs and additions; each of these represents an important means of providing access to Washington's waters. To this end, the data suggest that the maintenance of existing access sites and launch ramps is just as important in working to alleviate crowding issues caused by the overall deficit in access. Additionally, providers need to be better informed about the grant process, the constraints on what can be funded, and where and how maintenance funding can be obtained (if possible) under the current funding processes in the state, including the RCO grant process.

At the same time, many boating providers indicated being uncertain about the RCO's proposal requirements, with some remarking on the complexity of the grant application process. The

larger issue may be that these perceptions represent fundamental gaps in sufficient knowledge of the RCO's grant program. To address some of these concerns, the RCO may wish to consider issuing Requests for Proposals for grant projects in order to better outline the Office's objectives, and to more efficiently publicize project needs with the needs identified in the results of this assessment.

11. ENVIRONMENTAL ISSUES

In general, boating providers show a greater concern for environmental issues in Washington than do the boaters themselves. This, however, should not detract from the importance of educating both enforcement personnel and boaters on environmental issues before the onset of a crisis (e.g., a zebra mussel outbreak in Washington waters). As previously mentioned, agency responsibilities regarding issues such as invasive species are potentially sketchy, often because multiple steps are required to sufficiently address the issue: the prevention of invasive species depends on both an enforcement and an educational component. Water quality, technically listed as a responsibility of the Department of Ecology, was a major concern among all providers (note that water quality is the top natural resource concern among Americans). In particular, providers voiced concern about the potential for boaters to act indirectly as sources of pollution, such as through fuel spillage, the use of copper bottom painted boats, or by spreading contamination from pumpout and dump stations.

In the survey, a majority of providers (60%) cited marine sanitation as an area of particular importance. In the focus groups, participants named milfoil, stormwater regulations, boat emissions, beach and shoreline erosion, sediment management, and over-fishing as areas to include in environmental training programs for personnel and educational materials for boaters. Finally, note that fishing was the top activity among boaters (53% had fished in the past two years in Washington), thereby demonstrating latent concern among boaters over issues potentially affecting fishing, such as invasive species and water quality.

The data suggest that agencies directly involved in environmental education and information dissemination (the State Parks and Recreation Commission and the Department of Ecology) may wish to increase information and education efforts focusing on the environmental impacts of

boating, including ways for boaters to mitigate their environmental impacts. Issues of particular importance may be evaluated through a communications plan that could also address methods for informing boaters on the issues. If possible, a component for enforcement personnel and marina operators could be included.

ABOUT RESPONSIVE MANAGEMENT

Responsive Management is a nationally recognized public opinion and attitude survey research firm specializing in natural resource and outdoor recreation issues. Its mission is to help natural resource and outdoor recreation agencies and organizations better understand and work with their constituents, customers, and the public.

Utilizing its in-house, full-service, computer-assisted telephone and mail survey center with 45 professional interviewers, Responsive Management has conducted more than 1,000 telephone surveys, mail surveys, personal interviews, and focus groups, as well as numerous marketing and communications plans, need assessments, and program evaluations on natural resource and outdoor recreation issues.

Clients include most of the federal and state natural resource, outdoor recreation, and environmental agencies, and most of the top conservation organizations. Responsive Management also collects attitude and opinion data for many of the nation's top universities, including the University of Southern California, Virginia Tech, Colorado State University, Auburn, Texas Tech, the University of California—Davis, Michigan State University, the University of Florida, North Carolina State University, Penn State, West Virginia University, and others.

Among the wide range of work Responsive Management has completed during the past 20 years are studies on how the general population values natural resources and outdoor recreation, and their opinions on and attitudes toward an array of natural resource-related issues. Responsive Management has conducted dozens of studies of selected groups of outdoor recreationists, including anglers, boaters, hunters, wildlife watchers, birdwatchers, park visitors, historic site visitors, hikers, and campers, as well as selected groups within the general population, such as landowners, farmers, urban and rural residents, women, senior citizens, children, Hispanics, Asians, and African-Americans. Responsive Management has conducted studies on environmental education, endangered species, waterfowl, wetlands, water quality, and the reintroduction of numerous species such as wolves, grizzly bears, the California condor, and the Florida panther.

Responsive Management has conducted research on numerous natural resource ballot initiatives and referenda and helped agencies and organizations find alternative funding and increase their memberships and donations. Responsive Management has conducted major agency and organizational program needs assessments and helped develop more effective programs based upon a solid foundation of fact. Responsive Management has developed Web sites for natural resource organizations, conducted training workshops on the human dimensions of natural resources, and presented numerous studies each year in presentations and as keynote speakers at major natural resource, outdoor recreation, conservation, and environmental conferences and meetings.

Responsive Management has conducted research on public attitudes toward natural resources and outdoor recreation in almost every state in the United States, as well as in Canada, Australia, the United Kingdom, France, Germany, and Japan. Responsive Management routinely conducts surveys in Spanish and has also conducted surveys and focus groups in Chinese, Korean, Japanese, and Vietnamese.

Responsive Management's research has been featured in most of the nation's major media, including CNN, ESPN, *The Washington Times*, *The New York Times*, *Newsweek*, *The Wall Street Journal*, and on the front pages of *The Washington Post* and *USA Today*.

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