



2020 Minnesota Recreational Boating Study

6/23/2021

GLM 20204



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Research Overview

Great Lakes Marketing Research (GLM) conducted a statewide survey with 2,893 recreational boaters on behalf of the Minnesota Department of Natural Resources (DNR). The research objectives were:

- To measure boating activities on Minnesota waterways,
- To measure satisfaction levels with Minnesota boating services, and
- To understand opinions about boating management and boat and water safety topics.

Research Methodology

Sample

The DNR provided GLM a stratified random sample of Minnesotans with registered watercraft, segmented by type of watercraft registered and geographic location. The sample was limited to Minnesota adults with watercraft registered for pleasure use. Two regions (Twin Cities Metro and Greater Minnesota) are split into three watercraft registration categories; motorized-only, non-motorized-only, and both motorized and non-motorized (see below), creating six specific respondent segments. The following table shows the population numbers provided by DNR used to weight the survey data (N=591,546). The weighting process¹ allows for the total column to accurately reflect the population. The data in the table below reflect individuals, not watercrafts. One person may own multiple watercrafts.

Region	TOTALS	Motorized only	Non-motorized only	Both Motorized and Non-motorized
Twin Cities Metro	231,817	168,534	39,682	23,601
Greater Minnesota	359,729	282,741	39,489	37,499
Total	591,546	451,275	79,171	61,100

Between 386 and 568 surveys were completed per each of the six segments, for a total sample of 2,893. For analysis purposes, GLM weighted the data to match the number of boat owners within each region who registered a specific watercraft type.

¹ Data are weighted to allow the sample to be large enough to reflect a segment of the population, but not have more influence on the analysis than that segment reflects. For example, the non-motorized, Twin Cities Metro cell is 6.7% of the population. This small percentage would yield less than 200 survey responses if the sample were proportional to the population. In our study, we oversampled this segment (i.e., surveyed 453) but weighted their responses to reflect about 7% of the sample.

The survey included a question about watercraft ownership and some of these results are reported. Information on boat ownership is different from registered boats because many boats may not be registered, notably non-motorized watercraft less than ten feet long.

Data Collection Process

DNR randomly selected about 1,270 individuals from each segment to be included in the sample. Duplicate households were removed, to the extent feasible. Each respondent received a questionnaire packet that included a cover letter, self-administered survey, and postage-paid return envelope. Respondents were offered three options to complete the survey; return by mail, complete the survey online², or call a phone number to complete the survey with a live interviewer. About 40% completed the survey online.

Those who did not complete the survey were sent a reminder survey packet. All respondents who completed the survey were entered into a drawing for one of ten \$50 gift cards.

Questionnaire Development

GLM and DNR collaborated on the questionnaire content. Two versions of the questionnaire were created. The online version included a few questions that were not included in the hard copy survey. (Lower-priority questions were included in the online version only to reduce the length of the mailed survey document.)

Questions that were included in the online version only are designed as such [ONLINE QUESTION ONLY].

Response Rate

The response rate was 40% after the second mailing.

Timeframe

The first mailing was sent on November 19, 2020; the second mailing was sent on December 22, 2020. All surveys received by January 29, 2021, were included in the sample.

Email Survey

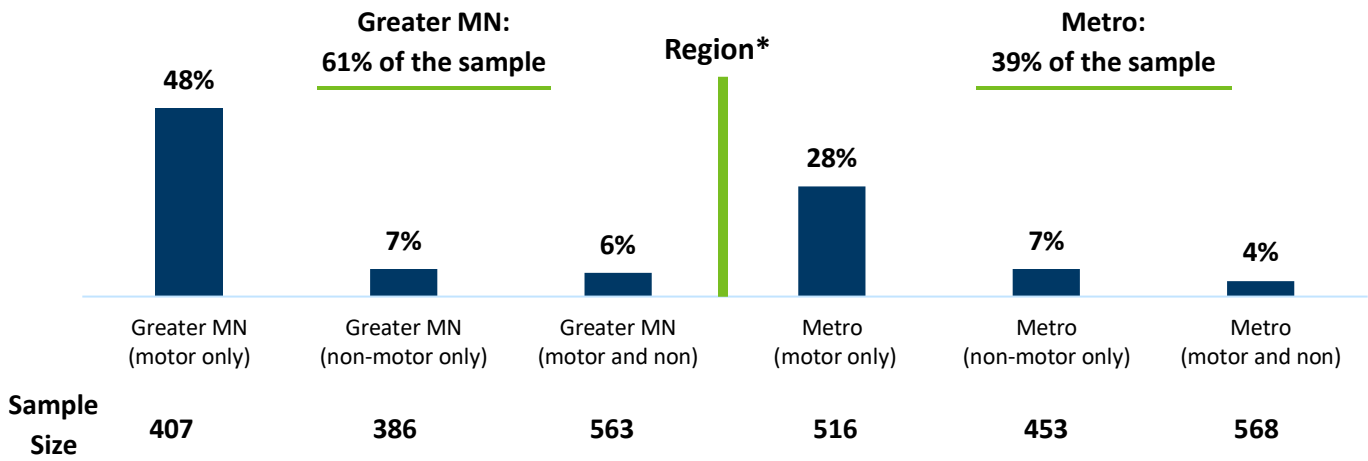
The survey was also distributed through email to a non-random group of boaters. **These results were kept separate from the random sample data and the results are not included in this report.** Contact the DNR for more information.

² Sample members had the option of typing **MNBoaters.com** in their web browser or scanning the QR code from the cover letter. Two online links were accessible from the website, an ADA compliant version and a standard viewing link.

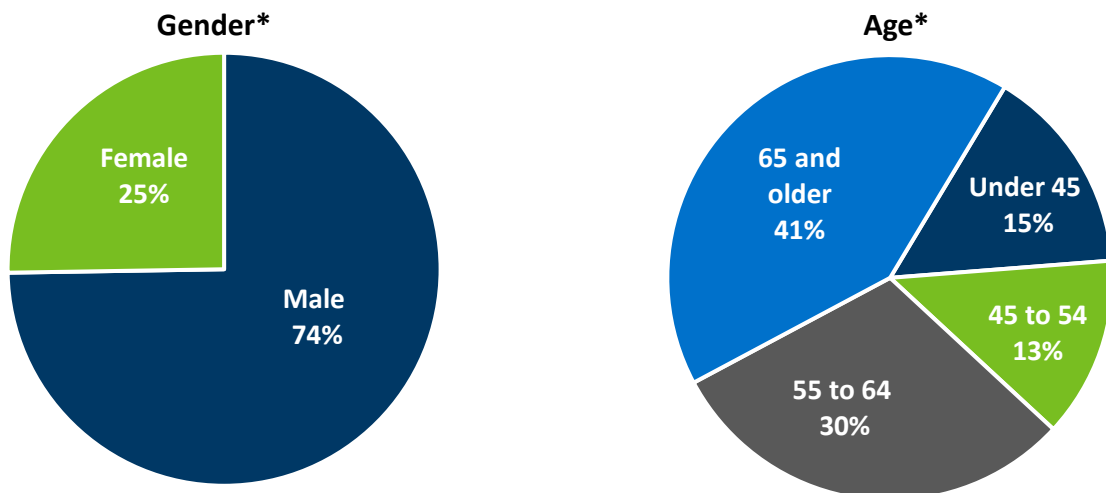
Sample Respondent Profile

The data shown throughout the report have been weighted to match the population of recreational boat owners (referred to as recreational boaters) based on two geographic regions and watercraft ownership (for a total of six segments). Most (76%) register only a motorized watercraft, and the majority (61%) reside outside of the metro area.

Nearly half of the respondents are from the Greater Minnesota area and only register motorized watercraft.

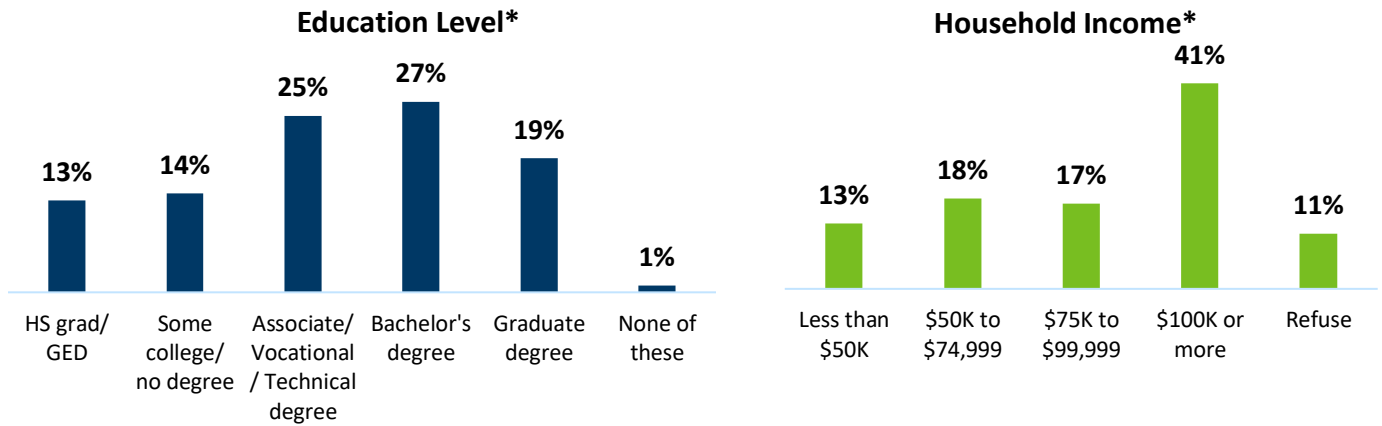


The age and gender of the respondents fell naturally based on the sample. Approximately three-fourths of the respondents are age 55 or older, and the majority are males. Nearly all (96%) respondents are white/ non-Hispanic.



*N=591,546

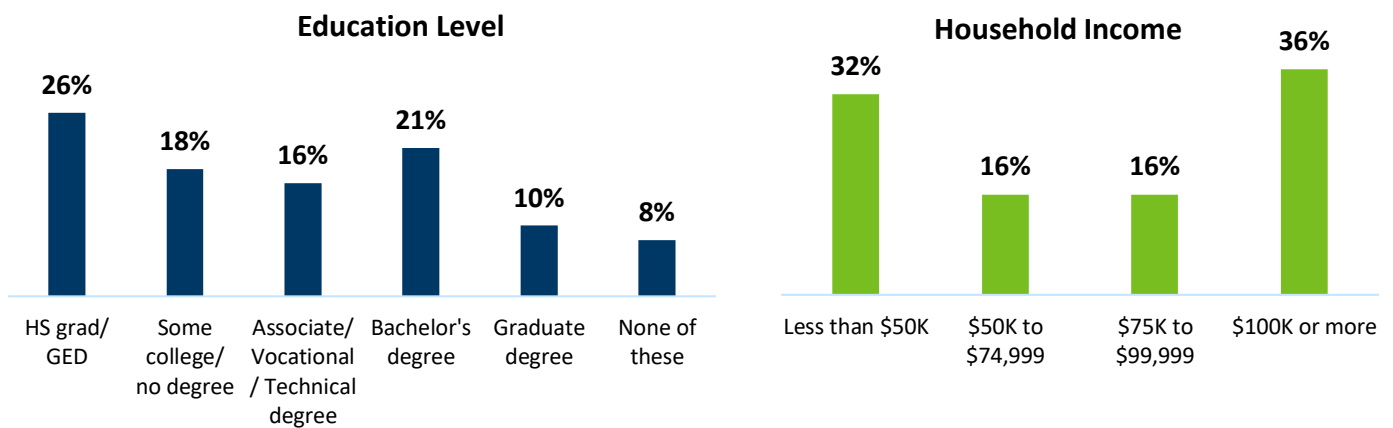
The majority of recreational boaters (87%) have some college education, and more than half have an annual household income of \$75,000 or more.



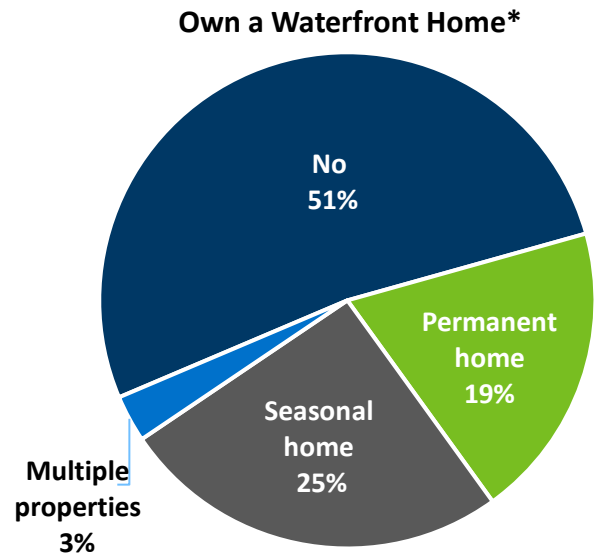
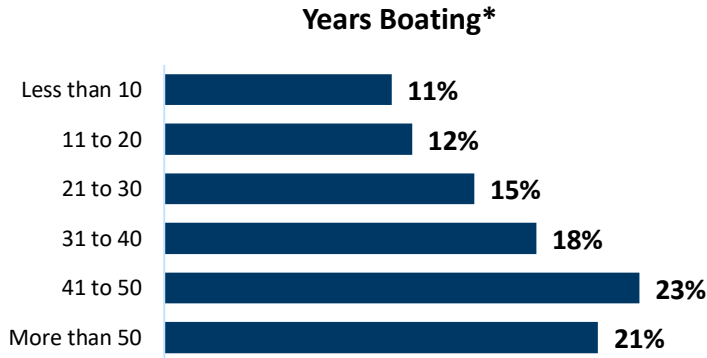
*N=591,546

These results show that Minnesotans with registered boats are older, more highly educated, more affluent, and more likely to be male and white than the general population.

Minnesota's adult (18 years and older) population statistics are below to compare with the survey results. The population statistics are obtained from the United States Census Bureau Current Population Survey, Annual Social and Economic Supplement, 2018.

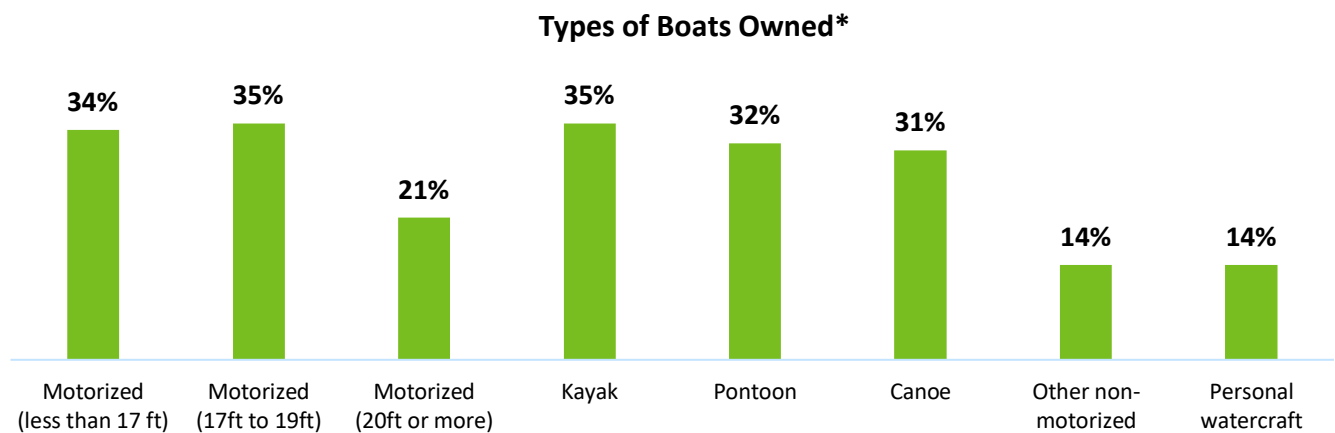


About two-thirds (62%) of the respondents have been boating for more than 30 years. About half of the respondents own at least one waterfront home. Of those who have one waterfront property, about 43% consider it to be a permanent home.

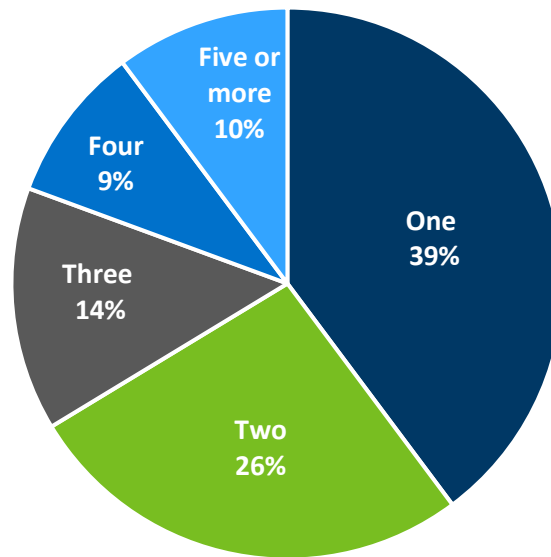


*N=591,546

Respondents own a variety of motorized and non-motorized watercraft. About two-thirds (61%) own more than one watercraft.



Number of Boats Owned*



*N=591,546

Boating is often a social group activity. People may go boating with others, or by themselves on watercraft owned and registered by friends or family members. Boaters who do not have registered watercraft are not represented here because of the study design.

Summary of Key Statistics

Research Objectives

- This research was conducted to learn the behaviors and attitudes of Minnesota recreational boaters who have licensed a motorized or non-motorized boat with the DNR. The sample of 2,893 recreational boaters has been weighted to be proportional to the profile of recreational boaters who have licensed boats. Therefore, these data can be used to understand and profile the population of those who have licensed boats.
- It is important to keep in mind that the person who licensed the boat may not be the one using the boat. The data reflect the behaviors and sentiments of the person who licensed the boat(s), not all persons who use watercraft on Minnesota lakes and rivers.

Boater Profile

- Individuals who licensed boats skew older, more educated, and more affluent (based on household income) than the population of Minnesota.
- About half (49%) of the respondents own waterfront property. Of those who own waterfront properties, about half own seasonal homes.
- Three-fourths (75%) say boating is an important part of their life.
 - Most (89%) of the recreational boaters say they go boating for rest and relaxation. However, about half (48%) say they go boating to catch/ harvest fish.
- Most recreational boaters (59%) have more than one watercraft. About one-third own three or more boats.
 - Mid-size motorized boats (seventeen to nineteen feet) (35%) and smaller motorized boats (less than seventeen feet) (34%) are more commonly owned. Larger motorized boats (twenty feet or more) (21%) are less popular.

Boating Activities

- The most common activities among boater owners are boat riding (77%), fishing (76%), and swimming off of the boat (47%).
- Just over one-quarter (28%) paddle and 32% water ski or tube. Fewer (5%) wake-surf.
- Of those who fish, about 75% fish at least some of the time they go boating.
- Half (50%) of the recreational boaters used non-motorized boats last season.
- Sixty percent (60%) of non-motorized recreational boaters use non-motorized boats entirely on lakes and 4% use them entirely on rivers. The remainder (36%) use non-motorized watercraft on a mix of lakes and rivers.

The Boating Experience

- Most recreational boaters engage in boating for rest and relaxation (89%), social times (62%), or fishing/ harvesting (48%).
- Recreational boaters are generally satisfied with the Minnesota boating system.
 - 87% are satisfied with the overall water recreation system.
 - 70% or more are satisfied with the enforcement of boating regulations, boating safety education, and information about boating opportunities, rules, and maps.
- High wakes (34%), boats going too fast or too close to shore (30%), jet skis (27%), and wake-surfing (24%), are the most common problems.
 - Greater Minnesota recreational boaters, Metro area recreational boaters, and lakeshore property owners perceive problems as more serious. The Greater Minnesota area feels that

recreational boaters making high wakes (28%), going too fast (27%), jet skis (25%), and careless operation (25%) are the biggest issues. About half (43%) of the recreational boaters in the Metro area feel high wakes from other recreational boaters is the biggest problem followed by careless operation of boats (38%), boats going too fast (36%), and wake-surfing boats (33%).

- Lakeshore property owners feel high wakes (39%), boats going too fast (35%), careless operation (32%), wake-surfing (29%), and jet skis (29%) are the biggest problem areas.
- About 80% perceive crowding to be an issue 25% or less of the time.

Public Water Access Facilities

- About 79% of recreational boaters use public launches and about two-thirds of those users use public launches more than three times a year.
- Respondents say that docks (79%), toilets (54%), and a large parking lot (52%) are most important amenities to have at public boat launch facilities.
- Of those who have used a public boat launch, 88% are satisfied with the availability of public launches and 79% are satisfied with the quality of public launches.
 - Recreational boaters who are willing to pay more in registration fees are most likely to support maintaining existing boating facilities rather than additions or improvements.

Boating Safety and Enforcement

- Nearly all (90%) recreational boaters have life jackets on their boats.
- A minimal difference exists between the two regions for wearing life jackets. About 60% in each region wear life jackets 25% or less of the time when boating.
- At least 42% of the respondents are willing to support restricting wake-surfing in shallow water, on small lakes, and near shore.
- Almost all respondents say some wakeboard boat restrictions are needed (about 94%). Additionally, those with waterfront homes are more likely to support wakeboard boat restrictions further away from shore.
 - Among those who want restrictions or have an opinion about wake-surfing restrictions, about two-to-one prefer restrictions are on a lake-by-lake basis rather than on a statewide basis.
 - Waterfront homeowners are more likely to support wake-surfing restrictions (i.e., wake-surfing near shores and wake-surfing in shallow water). However, the majority of all respondents support restricting wake-surfing near shore.
- Respondents are more likely to oppose than support expanding the time jet skis are allowed on the water.
 - More than half (54%) of waterfront homeowners oppose expanding the hours to operate a personal watercraft. However, even 44% of those who do not own waterfront property oppose expanding the hours to operate a personal watercraft.

Section 1: Boating Activity Behaviors and Use of Boating Facilities

1a. General Boating Activities



Respondents participated in numerous boating activities this past season. The most common activities are boating and fishing. People who own a boat and fish indicated that they fish more than half of the time they are on the water.

In which boating activities did you participate this past season (2020)? [Aided/ Multiple Mentions]

Boating activities participated in this past season	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Boat riding	77%
Fishing	76%
Swimming off the boat	47%
Water skiing or tubing	32%
Paddling	28%
Jet Skiing/ riding personal watercraft	16%
Wake-surfing	5%

About what percentage of the time did you fish when you were boating this past season (2020)?

Percentage of time fished when boating this past season	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
100%	13%
75%	19%
50%	10%
25%	9%
Less than 25%	25%
Did not fish (0%)	24%

42% of all recreational boaters and 55% of all those who fish, fished at least 50% of the time when they were boating this past season.

Nearly half (44%) of the respondents say their boating activity did not change in comparison to past years. If a change did occur, about half increased their activity, and about half decreased their activity. Boat registrations have continued a consistent trend of increasing or decreasing about 1% each year.

Just under two-thirds (61%) boated on two or more bodies of water this past season.

How has the frequency of your boating activity changed in 2020 compared to past years?

Change in boating activities during 2020 compared to past years	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
No change, same as past years	44%
I went boating more	27%
I went boating less	28%

About how many different MN water bodies did you boat on this past season (2020)?

Number of MN water bodies boated on this past season	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
1	38%
2	19%
3 to 5	28%
6 to 10	10%
11 to 20	3%
21 or more	1%

Exactly half of the respondents used a non-motorized watercraft this past season.

Did you participate in any water activities on MN waters this past season (2020) using a non-motorized watercraft (such as a kayak, canoe, or paddleboard)?

Participated in water activities on MN waters using a non-motorized watercraft	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Yes	50%
No	50%

Those who are on the water using a non-motorized watercraft are light users of state water trails and even less likely to overnight camp along a water trail.

IF PARTICIPATED IN WATER ACTIVITIES THIS PAST SEASON USING A NON-MOTORIZED WATERCRAFT: How many times have you paddled on a MN State Water Trail this past season (2020)? The question includes 50% of the total sample.

Number of times paddled on a MN State Water Trail this past season	Total (weighted)
Sample Size	1,975
Total (weighted)	294,198
0	67%
1 to 2	16%
3 to 5	9%
6 to 10	4%
11 or more	2%

IF PARTICIPATED IN WATER ACTIVITIES THIS PAST SEASON USING A NON-MOTORIZED WATERCRAFT: How many nights have you camped along a State Water Trail this past season (2020) during a multi-day paddle trip? The question includes 50% of the total sample.

Number of nights camped along a State Water Trail this past season	Total (weighted)
Sample Size	1,975
Total (weighted)	294,198
0	90%
1 to 2	4%
3 to 5	3%
6 to 10	1%

Respondents are boating for rest and relaxation (89%) and socialization (62%). Three-fourths (75%) say boating is an important part of their lives, with more than half (56%) saying it is very important.

[ONLINE QUESTION ONLY]

Thinking of all of the boating activities you participate in, how important is boating in your life? The question includes 37% of the total sample.

How important is boating	Total (weighted)
Sample Size	1,165
Total (weighted)	217,493
<u>Important</u>	75%
Very important	56%
Slightly important	20%
<u>In the middle</u>	19%
<u>Not important</u>	6%
Somewhat not important	4%
Not at all important	2%

What are your most important reasons for boating? [Aided/ Multiple Mentions]

Most important reasons for boating	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Rest and relaxation	89%
Social time	62%
Catching/ harvesting fish/ game	48%
Physical health	27%
Challenge/ adventure	21%
Education/ skill-building	9%

1b. General on the Water Behaviors

Most respondents have life jackets, lights, and throwable flotation devices on their motorized boats.

Which of the following types of equipment do you have on your motorized boat(s)? [Aided/ Multiple Mentions]

Types of equipment on your motorized boat	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Life jacket	90%
Lights	84%
Throwable flotation device	81%
Fire extinguisher	77%
Horn	72%
Automatic engine cut-off	57%
Visual signal	30%
Marine toilet	7%
Carbon monoxide detector	7%
Do not have a motorized boat	9%

Only 16% of all recreational boaters say they wear a life jacket 100% of the time they are boating. About half of recreational boaters wear a life jacket 10% or less of the time.

Of those who wear life jackets, most (87%) use a foam life jacket, and about 12% use an inflatable.

About what percentage of the time do you wear a life jacket when boating?

Percentage of time wearing a life jacket when boating	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
0%	24%
10%	26%
25%	13%
50%	13%
75%	9%
100%	16%

What type of life jacket do you typically wear? [Aided/ One Mention]

Type of life jacket typically worn	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Foam	66%
Inflatable	9%
Do not wear one	24%

1c. Use Rates of Different Boating Facilities

The majority of respondents (79%) say they use public launches. Less than one in four (24%) use private launches, and even fewer (12%) use private marinas.

Which boating facilities did you use this past boating season (2020)? [Aided/ Multiple Mentions]

Boating facilities used this past season	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Public launches	79%
Private launches	24%
Private marinas	12%
Public carry-in launches (no trailer ramp)	10%
MN State Water Trails (major rivers)	6%
Watercraft campsites	5%
Safe harbors on Lake Superior	2%
Locks and dams	2%
None of these	5%

Just under two-thirds of those using a public launch were relatively infrequent users (launched a boat less than five times this past season). About 61% of those accessing a public site launched a boat of seventeen feet or longer.

IF USED A PUBLIC BOAT LAUNCH IN MINNESOTA THIS PAST SEASON: About how many times did you launch at a public water access site in MN this past season (2020)? The question includes 81% of the total sample.

Number of times launched at a public water access site in MN this past season	Total (weighted)
Sample Size	2,367
Total (weighted)	480,600
1 to 2	36%
3 to 5	26%
6 to 10	16%
11 to 20	13%
21 to 50	6%
50 or more	2%

IF USED A PUBLIC BOAT LAUNCH IN MINNESOTA THIS PAST SEASON: What type of boat did you launch most often at a MN public water access site this past season (2020)? [Aided/ One Mention] The question includes 81% of the total sample.

Type of boat launched at a MN public water access site	Total (weighted)
Sample Size	2,367
Total (weighted)	480,600
Motorized boat (less than 17 ft)	25%
Motorized boat (17 ft to 19 ft)	34%
Motorized boat (longer than 19 ft)	27%
Canoe, kayak, or paddleboard	10%
Other	3%

Three-fourths (76%) of respondents using non-motorized watercraft used them mostly on lakes this past season. Almost half did not transport their non-motorized boat to waterbody in Minnesota. About 59% transported their non-motorized boat to the waterbody, and about 16% made six or more trips this past season. Trends by those who have waterfront properties are in [Section 4a](#).

IF PARTICIPATED IN WATER ACTIVITIES THIS PAST SEASON USING A NON-MOTORIZED WATERCRAFT: Which of the following best describes where in MN you used your non-motorized boats this past season? The question includes 50% of the total sample.

Where non-motorized boats were used this past season	Total (weighted)
Sample Size	1,975
Total (weighted)	294,198
Entirely on lakes	60%
Mostly on lakes	16%
Mostly on rivers	7%
Entirely on rivers	4%
Equal mix of both	12%

IF PARTICIPATED IN WATER ACTIVITIES THIS PAST SEASON USING A NON-MOTORIZED WATERCRAFT: About how many times did you transport your non-motorized boat(s) to a waterbody in MN this past season (2020)? The question includes 50% of the total sample.

How many times non-motorized boat(s) were transported to a MN waterbody this past season	Total (weighted)
Sample Size	1,975
Total (weighted)	294,198
0	41%
1 to 2	27%
3 to 5	16%
6 to 10	9%
11 to 20	5%
21+	2%

Among those who transported a non-motorized watercraft, about 62% used a public launch.

IF PARTICIPATED IN WATER ACTIVITIES THIS PAST SEASON USING A NON-MOTORIZED WATERCRAFT AND TRANSPORTED IT: When transporting your non-motorized boat(s), which of the following places in MN did you use to launch most often this past season (2020)? [Aided/ One Mention] The question includes 30% of the total sample.

Places launched most often this past season when transporting non-motorized boat(s)	Total (weighted)
Sample Size	1,351
Total (weighted)	174,980
Public boat launches	38%
Public carry-in launches (no trailer ramp)	24%
Private property (home / cabin/ etc.)	27%
Alongside a public road or highway	6%
Commercial property (resort/ marina/ boat rental/ etc.)	2%
Other	1%

Section 2: Boating Experience and Satisfaction

Even though nearly half of the respondents believe there were more boats on the water during the 2020 season, too many boats (crowding) does not appear to be an issue. Past DNR boating studies have shown that Twin Cities’ area lakes are used 3 to 10 times more intensely than lakes in other parts of the state. These studies also found that Twin Cities’ area recreational boaters perceived crowding and congestion at higher rates.

How does the number of boats you have seen on the water this year compare to past years?

Number of boats on the water this past year compared to past years	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
More	48%
Substantially more	23%
Slightly more	26%
About the same	32%
Fewer	13%
Slightly fewer	9%
Substantially fewer	4%
Not sure	6%

About a third of boaters did not experience crowding/ too many boats last season. About 15% did experience crowding about half of the time or more often while they were boating this past season.

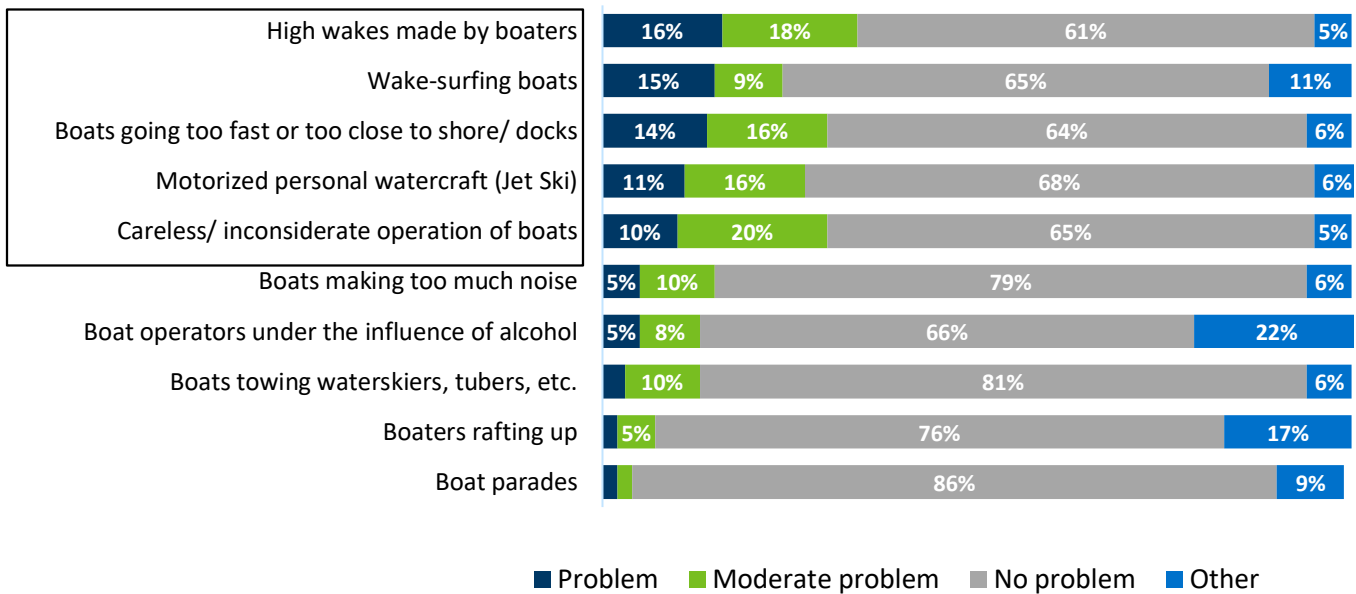
About what percentage of the time was there crowding/ too many boats while you were boating this past season (2020)? [Aided]

Percentage of time there was overcrowding/ too many boats	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
0%	31%
10%	29%
25%	19%
50%	11%
75%	3%
100%	1%
Not sure	6%

Most of the respondents do not have a problem with activities occurring on Minnesota lakes and rivers. The table below shows that high wakes made by recreational boaters, wake-surfing boats, boaters going too fast too close to the shore, motorized personal watercraft, and inconsiderate boating are a problem for about one-quarter or more respondents.

The "other" category includes those who were unsure or left the question unanswered.

Based on your boating experience this past season (2020), how much of a problem is the following on lakes and rivers in MN?

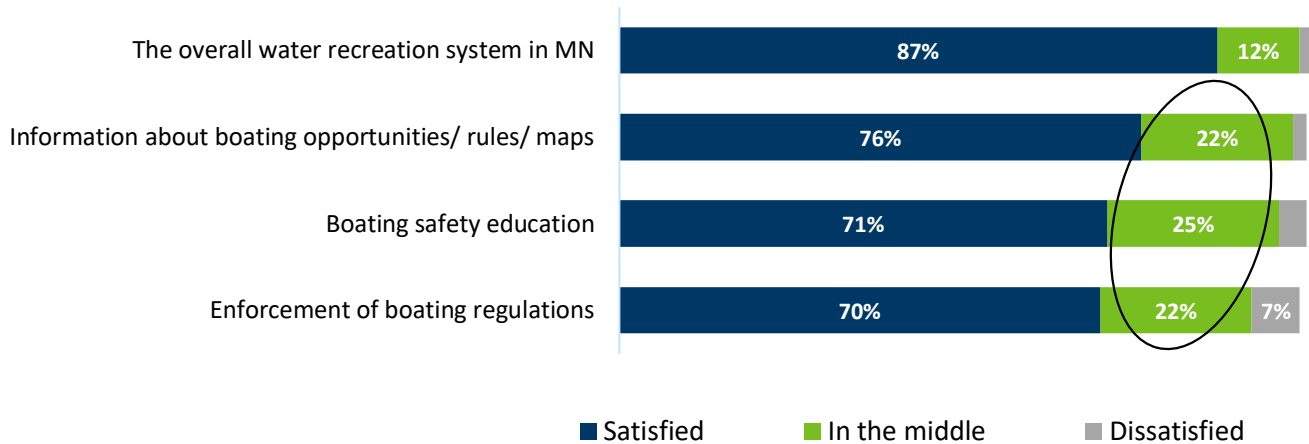


N=591,546

Note: Percentages less than 5% are not displayed.

Most respondents (87%) are satisfied with the overall water recreation system in Minnesota. About one-quarter are neutral regarding three of the offerings rated. About 7% are dissatisfied with the enforcement of boating regulations. This question was only asked to those who took the survey online.

****[ONLINE QUESTION ONLY]***
How satisfied are you with the following aspect of the MN water recreation system and safety program?



N=217,493

Note: Percentages less than 5% are not displayed.

****Includes 37% of the total sample***

A subset of respondents (104 online participants) did offer a suggestion to improve their satisfaction with boating in Minnesota. The themes of their answers were enforcement and education. (This question was only asked to those who said they were dissatisfied with an aspect of the program.)

[ONLINE QUESTION ONLY]

IF DISSATISFIED WITH ANY ASPECTS OF THE MN WATER RECREATION SYSTEM: What is the number one thing that could improve your satisfaction with boating in MN? The question includes 4% of the total sample.

Improvements to boating in MN	Total (weighted)
Sample Size	104
Total (weighted)	20,961
Rules/ law enforcement	46%
Training/ education	28%
Other	26%

Rules and enforcement comments included such comments as:

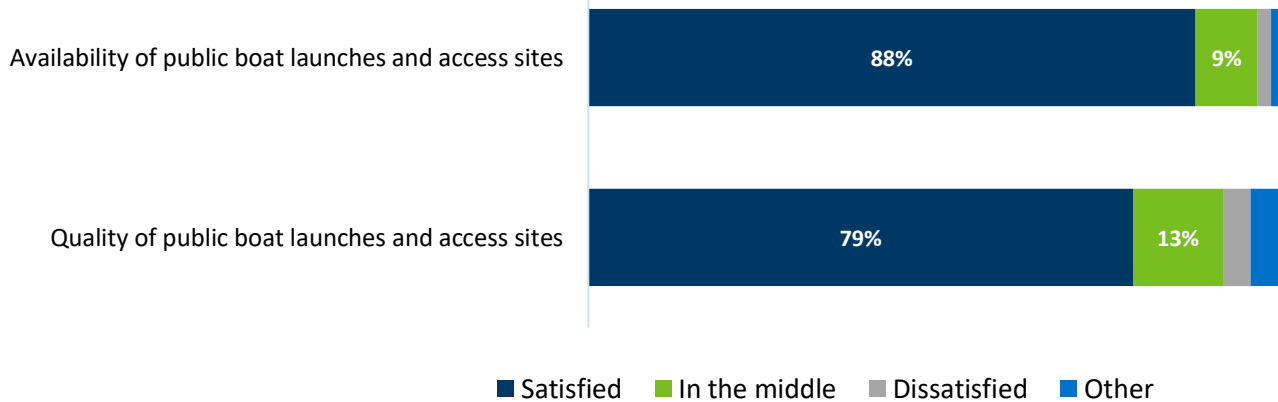
- Too much enforcement
 - “It seems like between boating, waterfowl hunting, and fishing, there are so many rules, that one can only get tripped up in a regulatory violation. I would like to see any unique situations, deviations to speed limits, no-wake zones, fishing limits, and fish sizes for a specific body of water posted and publicized.”
 - “Too many rules and regulations and get rid of the stupid mandatory post-inspections. They just want to privatize their lake and get you off it.”
- Not enough enforcement
 - “Enforcement of boating safety and regulations.”
 - “I do not see adequate enforcement of wakeboard boats.”
 - “Wake boats have become a major problem. They are dangerous to every other boat on the water, destroy the shoreline, and should only be allowed on large lakes where they should be required to distance themselves from other boats. They should face more enforcement for being reckless and creating excessive noise related to music.”

Training and education included such comments as:

- “Better education for power boaters, less enforcement. Currently, most education seems to come through enforcement of PFD or weeds with things like noise and wakes ignored.”
- “Boaters being respectful of other people enjoying the lakes and rivers. Lots of boaters don’t care about other people and are flying by too close to other boats that are anchored, idling, or have people swimming nearby.”
- “Lack of education and enforcement of jet skis. Operators do not know they need to be so many feet away from shore or off the lake one hour before dusk. Often the operators are not very considerate-fast, noisy, close to shore or other boats.”
- “Require training for all boat operators, not just youth. You need to pass a test to drive a car, so why not something for boating. Just because someone can afford a large boat doesn’t mean they are a safe boater or understand the rules of boating.”

Most recreational boaters who use public boat launches are satisfied with the availability and the quality of the launch and access sites.

****IF USED A PUBLIC BOAT LAUNCH IN MINNESOTA THIS PAST SEASON:
How satisfied are you with MN's boat launches and access sites?***



N=480,600

Note: Percentages less than 5% are not displayed.

****Includes 81% of the total sample***

Users of non-motorized boats suggest a few directions that the DNR could focus on to support those using non-motorized watercraft.

***IF PARTICIPATED IN WATER ACTIVITIES THIS PAST SEASON USING A NON-MOTORIZED WATERCRAFT:
What's the number one thing the DNR could do to support the use of kayaks, canoes, and paddleboards in MN? [Unaided] The question includes 14% of the total sample.***

Ideas for DNR to support non-motorized watercraft	Total (weighted)
Sample Size	614
Total (weighted)	79,956
Access point/ launch areas	20%
Fees/ registration	19%
Motorized activity	17%
Provide information/ advertise	12%
Education/ training	8%
Facility expansion/ maintenance	6%
Other	18%

Access point/ launch areas comments included:

- “Adding the launch shoot to the docks. It makes it easier for some people to be able to get into the kayak and paddle off the launch rather than getting stuck at the shore. Also being able to paddle into a launch shoot to get out of the kayak would help people too.”
- “Boat launches need to be expanded to include a separate launch site dedicated to paddlers. Launching from a traditional concrete boat launch is challenging and precarious. So is launching from the dock. A separate improved beach is what is needed. The city of Champlain has the ideal set up at Mississippi Point Park.”
- “Improve access. Many accesses are little more than a muddy trail up a steep bank. Make it easier to launch and land non-motorized watercraft.
- Separate launches between motorized and non-motorized boaters. They take so much time and we must wait for them. Same with parking. Motorized boaters get priority parking in most lots. Nonmotorized boaters must drop off boats and park elsewhere.”

Fees/ registration comments included:

- “Do not require boat licensing for paddleboards and kayaks. It is ridiculous to have this barrier to people new to boating in Minnesota.”
- “Don’t require registration. Charge for powerboats that use resources and potentially damage the environment. Encourage the use of no powerboats for physical activity.”
- “Increase fees on motorized boats and keep fees the same on kayaks canoes and paddleboards.”
- “It is patently ridiculous that we need to register non-motorized watercraft in the state of Minnesota. There is no other state that requires this of a 12-foot kayak. Remove the fees for reasonably sized non-motorized watercraft and increase fees for motorized.”

Motorized activity comments included:

- “Address motorized boating issues on all lakes to reduce wake issues that affect non-motorized boats.”
- “Limit the hours of motorized boats, as they are the biggest issue with non-motorized use. Create too many waves and are inconsiderate of smaller craft.”
- “Restricting the number of boats allowed on a body of water at a single time depending on the size of the lake.”
- “Typically, these non-motorized boats are not the primary issue affecting our lakes. The primary issues are related to transient boaters and wake surfing boats.”

Provide information/ advertise comments included:

- “Better communication of the availability of the water trails. I have been very involved in using many of the DNR resources and have not heard any communication about the state water trails.”
- “I never knew of water trails. I think more information about them would be great.”
- “Identifying non-wake or more non-motorized friendly lakes. The DNR could create a crowd-sourced app where people rate and recommend areas for non-motorized boating.”
- “Publish a guide for day trips. Easy float, white water ratings, services along the way, and so forth.”
- “Promote water camping sites and availability of links to campsites that you can book for multi-day paddle trips. Online and through social media.”

- “Website list of compatible waterways and launch sites.”

Education/ training comments included:

- “As both a motorized boat user and kayaker, I would fully support some sort of boat safety/ operation training/licensing for motorized boat users. Teaching basic water safety and operation is key to ensuring motorized and non-motorized boat users can safely be on the water together.”
- “Education/ enforcement of regulations pertaining to distance or separation from motorized to non-motorized watercraft.”
- “Encourage the public to use non-motorized watercraft often. Hold safety seminars at public landings. Give out gold stars to kayakers wearing their PFDs.”
- “More education on techniques on how to and where to. Have information on popular runs on rivers and streams. Estimated travel time on the water and what to expect on that run.”

Facility expansion/ maintenance comments included:

- “Expand designated camp spots where it makes sense on riverways.”
- “Fix your existing carry-in boat launches. Quite a few I’ve used were almost unusable. Had to form human chains just to get people and boats up.”
- “I do support the maintenance of existing facilities. The number of access locations is adequate. Program offerings for youth involvement would generate awareness of our natural resources and provide for safe and respectful use.”
- “Parking and creating spaces to launch kayaks, canoes, and paddleboards.”

Section 3: Policies

3a. Licensing and Fees

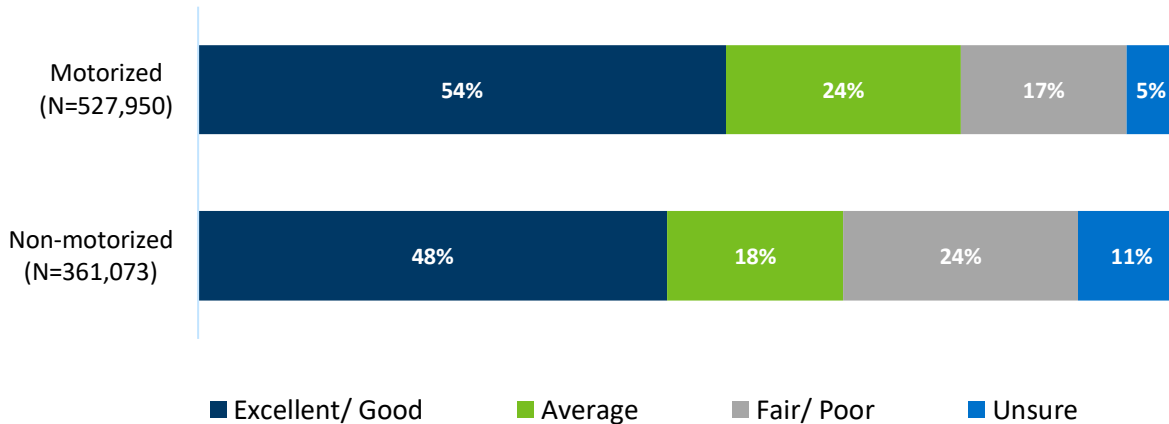
The DNR is charged with operating and maintaining public water access sites; rehabilitating aging sites that do not meet Minnesotans’ current needs; and providing boat and water safety outreach, training, enforcement and emergency response to serve the thousands of Minnesotans and visitors who recreate on Minnesota waters each year. Watercraft registration fees, which provide significant funding for these activities, have not increased since 2006. As a result, funding and investment to support water recreation in Minnesota has not kept pace with the need, as use has expanded and infrastructure has aged.

The watercraft surcharge for aquatic invasive species (AIS) started in Minnesota in 1990 with a \$2 surcharge on a three-year watercraft registration to be used for purple loosestrife and Eurasian watermilfoil programs. The scope of the surcharge was expanded early on, and the AIS surcharge was increased to \$10.60 in 2019.

This survey included a number of questions to assess peoples’ opinions about registration fees and investment priorities.

Just over half (54%) of recreational boaters say they are getting excellent or good value for the money they pay to register. Just under half (48%) of those who registered a non-motorized watercraft say the value they get is excellent or good. (These percentages are based only on those who did register that type of boat.)

***For the money you currently pay to register your boat(s),
what value do you feel you are getting?***



About two-thirds (66%) of respondents support increased registration fees for some reason. However, respondents do not share consensus on what increased funds should be used for. About 43% would support an increase to maintain existing boating facilities. Support is lower if the money were to be used to increase facilities or add to facilities. About one-third (34%) of respondents would not support increasing registration fees.

I would support increasing watercraft registration fees if funds were used to: [Aided/ Multiple Mentions]

Support for watercraft registration fees if used to:	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Maintain existing boating facilities	43%
Increase parking at public boat launches	22%
Provide more amenities at boating facilities	16%
Increase boating safety patrols	16%
Provide access to more lakes and rivers	16%
More state water trail services	8%
Other	3%
None, I do not support increasing registration fees	34%

When asked how much increase respondents would support, 58% percent are willing to pay increased registration fees. Forty-one percent say they are not willing to pay more. Those willing to pay an additional amount would support about a 10% to 20% increase. Support for more than a 30% increase is very soft

How much more are you willing to pay to register your boat(s) for three years next time registration is due? [Aided]

How much willing to pay to register boat(s) for three years	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
0% more	41%
10% to 20% more	50%
30% to 40% more	5%
50% to 60% more	2%
70% or more	1%

3b. Boating Restrictions

At least 42% of respondents are willing to support restricting wake-surfing in shallow water, on small lakes, and near shore. About a quarter of recreational boaters say no wake-surfing restrictions are needed. Patterns by those who do and do not wake-surf are in [Section 4b](#).

Which of the following potential special restrictions for wake-surfing do you support? [Aided/ Multiple Mentions]

Support for special restrictions for wake-surfing	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Restricting wake-surfing near shore	57%
Restricting wake-surfing on small lakes	49%
Restricting wake-surfing in shallow water	42%
Restricting wake-surfing on weekends	18%
Restricting wake-surfing in the middle of the day	14%
No wake-surfing restrictions needed	26%

Among those who want restrictions or have an opinion about wake-surfing restrictions, about two-to-one prefer restrictions be on a lake-by-lake basis rather than on a statewide basis.

Should special restrictions for wake-surfing be applied statewide or for specific lakes?

Applied wake-surfing restrictions	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Lake-by-lake restrictions	41%
Statewide restrictions	22%
Unsure/ no opinion	21%
No restrictions needed	14%

Most respondents (60%) have an opinion about how many feet from shore wakeboard boats should be allowed to operate. However, they are not in agreement on what that distance should be. Responses vary by waterfront property ownership are shown in [Section 4a](#).

How many feet away from shore should wakeboard boats be required to operate? [Aided]

Feet away from shore wakeboard boats are required to operate	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
100 feet	6%
200 feet	17%
300 feet	16%
500 feet	21%
None, no restriction needed	6%
I don't know	31%

Respondents are more likely to oppose than support expanding the time personal watercraft are allowed on the water. Attitudes of those who use personal watercraft are shown in [Section 4b](#).

Currently, personal watercraft (Jet skis) may be operated only from 9:30 a.m. to 1 hour before sunset. Do you support or oppose expanding the times when people may operate personal watercraft?

Expand times when people may operate personal watercraft	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Oppose	49%
Support	28%
Unsure/ no opinion	22%

3c. Other Policies

About 10% of respondents feel it is necessary to require boat safety training and licensing. However, respondents are likely to support (57%) offering boat safety training to all recreational boaters as an option.

Boat safety training and licensing is optional for adults and all types of boats in MN. Which of these do you most support: [Aided]

Support for training and licensing	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Requiring all boat operators to complete boating training and have a license	10%
Requiring only motorized boat operators to complete boating training and have a license	15%
Offering optional boating training to all boat operators	57%
Unsure/ no opinion	18%

Most (77%) recreational boaters say they are willing to spend 30 minutes or less decontaminating their boat if a free unit is offered.

The DNR and local partners offer free decontamination (trained staff clean the watercraft with hot, and sometimes high pressure, water) at numerous water accesses to reduce the risk of spreading aquatic invasive species. After boating, how much time are you willing to spend to decontaminate your boat at a free aquatic invasive species decontamination unit? [Aided]

Time willing to spend decontaminating boat	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
None	5%
15 minutes or less	42%
15 to 30 minutes	35%
30 to 60 minutes	6%
1 to 2 hours	1%
Over 2 hours	0%
Not sure	10%

3d. Public Water Access Amenities and Policies

About three-fourths (79%) of recreational boaters say a dock to aid launching and landing is the most important feature for a public boat launch. Toilets and large parking lots with spaces are also important to about half of all recreational boaters.

Which of the following are most important to have at a public boat launch? [Aided/ Multiple Mentions]

Most important at a public boat launch	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Dock to aid launching/ landing	79%
Toilets	54%
Large parking lot with many spaces	52%
Multiple launch lanes/ ramps	40%
Map of the lake showing boating restrictions	27%
A place to put weeds/ aquatic invasive species/ etc.	27%
Map of the lake showing water depth and hazards	24%
Lighting	24%
Paved parking lot	22%
Tools for cleaning weeds and aquatic invasive species	20%
Long launch lanes/ ramps	18%
Emergency information	12%

Almost half of the respondents say improving existing public access sites is more important than adding new launches. However, one-third say they are both equally important.

Which of the following is most important to you? [Aided/ One Mention]

Most important aspect	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Improving maintenance/ quality of existing public water access sites	44%
Adding additional public access points/ boat launches	7%
They are equally important	33%
Neither are important	14%

3e. Boating Information

Recreational boaters have mixed feelings about using maps provided by the DNR. One-third (34%) of recreational boaters do not currently use maps. Recreational boaters who do use maps access them in a variety of ways, with about a third currently using paper maps.

[ONLINE QUESTION ONLY]

How do you use maps of public water access, fishing piers, and state water trails provided by the DNR?

[Aided/ Multiple Mentions] The question includes 37% of the total sample.

Use maps provided by the DNR	Total (weighted)
Sample Size	1,165
Total (weighted)	217,493
Do not use	34%
Paper maps	32%
Online maps (Google maps or other)	28%
Interactive online map (Online LakeFinder or water trail maps)	26%
Digital maps to download	25%
Geo PDF maps (use in apps like Avenza)	4%
Other	3%

The preferred method to access maps of public water access, fishing piers, and state water trails provided by the DNR is on smartphones.

[ONLINE QUESTION ONLY]

How would you prefer to access these maps of public water access, fishing piers, and state water trails provided by the DNR? [Aided/ One Mention] The question includes 37% of the total sample.

Preference to access maps provided by the DNR	Total (weighted)
Sample Size	1,165
Total (weighted)	217,493
Smartphone app	35%
Paper maps	15%
Digital maps to download	14%
Online maps (Google maps or other)	14%
Interactive online map (Online LakeFinder or water trail maps)	12%
Geo PDF maps (use in apps like Avenza)	2%
Other	1%
Do not want access to these maps	7%

About 40% of respondents prefer reading the DNR annual boating guide about laws and regulations in a paper booklet format, followed by 22% who prefer accessing it on a web page.

[ONLINE QUESTION ONLY]

The DNR publishes an annual boating guide that summarizes MN's boating laws and regulations. How would you prefer to access this information? [Aided/ One Mention] The question includes 37% of the total sample.

Preference to access annual boating guide from the DNR	Total (weighted)
Sample Size	1,165
Total (weighted)	217,493
Paper booklet	40%
Web page	22%
App, like LakeFinder	16%
Digital file to download	14%
Signs at public water access sites	4%
Social media	2%
Boat operator's training	1%
Other	1%
Do not want this information	1%

Section 4: Segment Analysis

The tables in this section show responses between different segments of the total sample. Because the sample size is large, statistical differences exist between answers that may vary by a few percentage points. Therefore, these tables are most useful to identify differences in priorities and themes among and between the sample segments.

4a. Own a Waterfront Home vs not Owning a Waterfront Home

Respondents who own a waterfront home are more likely to have issues with high wakes made by boaters, wake-surfing boats, and boats going too fast/ too close to shores and docks. The percentages shown are top-two box scores combined (very serious problem and serious problem).

How much of a problem is the following on lakes and rivers in MN?

Problems on lakes and rivers in MN	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,893	1,395	1,481
Total (weighted)	591,546	283,062	304,075
High wakes made by other boaters	16%	20%	13%
Wake-surfing boats	15%	19%	11%
Boats going too fast or too close to shore/docks	14%	19%	11%

More than half (54%) of waterfront homeowners oppose expanding the hours to operate a personal watercraft. In addition, 44% of those who do not own waterfront property oppose expanding the hours to operate a personal watercraft. About one-quarter (28%) of all respondents support expanding the hours to operate a personal watercraft.

Currently, personal watercraft (Jet skis) may be operated only from 9:30 a.m. to 1 hour before sunset. Do you support or oppose expanding the times when people may operate personal watercraft?

Expand times when people may operate personal watercraft	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,893	1,395	1,481
Total (weighted)	591,546	283,062	304,075
Oppose	49%	54%	44%
Support	28%	28%	27%
Unsure/no opinion	22%	17%	28%

Waterfront homeowners are more likely to support wake-surfing restrictions (i.e., wake-surfing near shores and wake-surfing in shallow water). However, the majority of all respondents support restricting wake-surfing near shore.

Which of the following potential special restrictions for wake-surfing do you support? [Aided/ Multiple Mentions]

Support for special restrictions for wake-surfing	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,893	1,395	1,481
Total (weighted)	591,546	283,062	304,075
Restricting wake-surfing near shore	57%	64%	52%
Restricting wake-surfing in shallow water	42%	45%	40%

Almost all respondents say some wakeboard boat restrictions are needed (about 94%). Additionally, those with waterfront homes are more likely to support wakeboard boat restrictions further away from shore.

How many feet away from shore should wakeboard boats be required to operate? [Aided/ One Mention]

Feet away from shore wakeboard boats are required to operate	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,893	1,395	1,481
Total (weighted)	591,546	283,062	304,075
100 feet	6%	7%	6%
200 feet	17%	17%	16%
300 feet	16%	19%	14%
500 feet	21%	26%	17%
None, no restriction needed	6%	6%	5%
I don't know	31%	22%	40%

Waterfront homeowners are more likely to participate in all boating activities except fishing than non-waterfront homeowners.

In which boating activities did you participate this past season (2020)? [Aided/Multiple Mentions]

Boating activities participated in this past season	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,893	1,395	1,481
Total (weighted)	591,546	283,062	304,075
Boat riding	77%	88%	68%
Fishing	76%	75%	76%
Swimming off the boat	47%	55%	39%
Water skiing or tubing	32%	40%	26%
Paddling	28%	33%	24%
Jet Skiing/ riding personal watercraft	16%	24%	9%
Wake-surfing	5%	7%	4%

The majority of waterfront homeowners who use a public launch are launching larger boats (seventeen feet or more). The non-waterfront homeowners tend to be launching smaller crafts (seventeen feet or smaller).

More than half of waterfront homeowners use non-motorized watercraft in 2020 compared to 43% of non-waterfront homeowners.

IF USED A PUBLIC BOAT LAUNCH IN MINNESOTA THIS PAST SEASON: What type of boat did you launch most often at a MN public water access site this past season (2020)? [Aided /One Mention] The question includes 81% of the total sample.

Type of boat launched at a MN public water access site	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,367	1,066	1,288
Total (weighted)	480,600	216,511	261,131
Motorized boat (less than 17 ft)	25%	19%	30%
Motorized boat (17 ft to 19 ft)	34%	33%	35%
Motorized boat (longer than 19 ft)	27%	38%	17%
Canoe, kayak, or paddleboard	10%	5%	15%
Other	1%	1%	1%

More than half (55%) of waterfront homeowners who use a public launch, launched one to two times this past season. In comparison, less than one-quarter (20%) of recreational boaters who do not have waterfront homes and use public launches are using them one to two times. Recreational boaters without waterfront homes launch at public water accesses more often than people with waterfront homes.

IF USED A PUBLIC BOAT LAUNCH IN MINNESOTA THIS PAST SEASON: About how many times did you launch at a public water access site in MN this past season (2020)? The question includes 81% of the total sample.

Number of times launched at a public water access site in MN this past season	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,367	1,066	1,288
Total (weighted)	480,600	216,511	261,131
1 to 2	36%	55%	20%
3 to 5	26%	23%	28%
6 to 10	16%	10%	21%
11 to 20	13%	8%	18%
21 to 50	6%	3%	8%
50 or more	2%	0%	3%

More than half (53%) of the waterfront homeowners used one body of water for their 2020 boating experiences, compared to 25% of non-waterfront homeowners visiting one body of water. Half of the non-waterfront homeowners boated on three to ten bodies of water this past season.

About how many different MN water bodies did you boat on this past season (2020)? [Aided/ One Mention]

Number of MN water bodies boated on this past season	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,893	1,395	1,481
Total (weighted)	591,546	283,062	304,075
1	38%	53%	25%
2	19%	19%	18%
3 to 5	28%	20%	35%
6 to 10	10%	4%	15%
11 to 20	3%	2%	4%
21 or more	1%	0%	1%

Waterfront owners are more likely to think improvements to existing public water access are more important than adding additional access points. Overall, more importance is placed on improvements than adding more sites amongst all recreational boaters.

Which of the following is most important to you? [Aided/ One Mention]

Most important aspect	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,893	1,395	1,481
Total (weighted)	591,546	283,062	304,075
Improving maintenance/ quality of existing public water access sites	44%	49%	39%
Adding additional public access points/ boat launches	7%	4%	10%
They are equally important	33%	27%	38%
Neither are important	14%	18%	11%

Homeowners are more likely to own more of each type of boat except smaller, motorized boats (less than seventeen feet) and boats over forty feet. Pontoons are typically owned by those who own a waterfront home.

What types of boats does your household have? [Aided/ Multiple Mentions]

Types of boats owned	Total (weighted)	Own a waterfront home	Do not own a waterfront home
Sample Size	2,893	1,395	1,481
Total (weighted)	591,546	283,062	304,075
Motorized (less than 17 ft)	34%	32%	37%
Motorized (17 ft to 19 ft)	35%	36%	34%
Motorized (20 ft to 25 ft)	17%	23%	12%
Motorized (26 ft to 39 ft)	3%	4%	3%
Motorized (40 + ft)	1%	0%	1%
Personal watercraft (Jet Ski)	14%	23%	5%
Kayak	35%	44%	26%
Pontoon	32%	52%	15%
Canoe	31%	37%	26%
Other non-Motorized (row or sail)	14%	18%	9%

4b. Personal Watercraft vs Wake-surfing

Those who wake-surf want fewer restrictions placed on wake-surfing activities compared to those who do not engage in that activity. About 56% of people who use personal watercraft also wake-surf. About 17% of wake-surfers also use personal watercraft. The overlap of wake surfers and people who use personal watercraft helps explain why these two user groups have similar opinions when compared to other types of watercraft.

Which of the following potential special restrictions for wake-surfing do you support? [Aided/ Multiple Mentions]

Support for special restrictions for wake-surfing	Total (weighted)	Participate in Jet skiing	Participate in Wake-surfing	Do not Participate in Jet skiing or Wake-surfing
Sample Size	2,893	407	111	2,428
Total (weighted)	591,546	96,648	29,856	481,667
Restricting wake-surfing near shore	57%	50%	25%	60%
Restricting wake-surfing on small lakes	49%	35%	10%	53%
Restricting wake-surfing in shallow water	42%	31%	15%	45%
Restricting wake-surfing on weekends	18%	13%	4%	19%
Restricting wake-surfing in the middle of the day	14%	11%	2%	15%
No wake-surfing restrictions needed	26%	39%	69%	22%

About 74% of those who wake-surf believe some type of restriction is needed.

How many feet away from shore should wakeboard boats be required to operate? [Aided/ One Mention]

Feet away from shore wakeboard boats are required to operate	Total (weighted)	Participate in Jet skiing	Participate in Wake-surfing	Do not Participate in Jet skiing or Wake-surfing
Sample Size	2,893	407	111	2,428
Total (weighted)	591,546	96,648	29,856	481,667
100 feet	6%	10%	19%	5%
200 feet	17%	23%	16%	16%
300 feet	16%	16%	19%	16%
500 feet	21%	19%	8%	22%
None, no restriction needed	6%	11%	26%	4%
I don't know	31%	21%	12%	34%

Those who use personal watercraft support expanding the time that these watercrafts can be used to a greater extent than those who participate in neither activity.

Currently, personal watercraft (Jet skis) may be operated only from 9:30 a.m. to 1 hour before sunset. Do you support or oppose expanding the times when people may operate personal watercraft?

Expand times when people may operate personal watercraft	Total (weighted)	Participate in Jet skiing	Participate in Wake-surfing	Do not Participate in Jet skiing or Wake-surfing
Sample Size	2,893	407	111	2,428
Total (weighted)	591,546	96,648	29,856	481,667
Oppose	49%	33%	39%	52%
Support	28%	48%	43%	24%
Unsure/ no opinion	22%	17%	18%	23%

4c. Own a Motorized Boat vs Do not Own a Motorized Boat

About 10% of all recreational boaters do not own a motorized boat. The majority (81%) of motorized recreational boaters used public launches this past season. Nearly two-thirds (60%) of non-motorized recreational boaters used public launches and 37% also used public carry-in launches (no trailer ramp).

Which boating facilities did you use this past boating season (2020)? [Aided/ Multiple Mentions]

Boating facilities used this past season	Total (weighted)	Own a motorized boat	Do not own a motorized boat
Sample Size	2,893	2,312	581
Total (weighted)	591546	530,206	61,339
Public launches	79%	81%	60%
Private launches	24%	25%	24%
Private marinas	12%	13%	6%
Public carry-in launches (no trailer ramp)	10%	6%	37%
MN state water trails (major rivers)	6%	6%	14%
Watercraft campsites	5%	4%	12%
Safe harbors on Lake Superior	2%	2%	3%
Locks and dams	2%	2%	2%
Other	2%	1%	4%
None of these	5%	4%	9%

Of those who use public boat launches, about two-thirds of motorized and non-motorized recreational boaters launched at a public water access site one to five times this past season.

IF USED A PUBLIC BOAT LAUNCH IN MINNESOTA THIS PAST SEASON: About how many times did you launch at a public water access site in MN this past season (2020)? The question includes 81% of the total sample.

Number of times launched at a public water access site in MN this past season	Total (weighted)	Own a motorized boat	Do not own a motorized boat
Sample Size	2,367	1,932	435
Total (weighted)	480,600	436,331	44,269
1 to 2	36%	36%	31%
3 to 5	26%	25%	36%
6 to 10	16%	16%	15%
11 to 20	13%	14%	11%
21 to 50	6%	6%	3%
50 or more	2%	2%	1%

The majority (79%) of motorized recreational boaters prioritize a dock to aid launching/ landing at public boat launches. More than half also feel toilets and large parking lots with many spaces are important.

Nearly two-thirds (63%) of non-motorized owners want toilets available and more than half (52%) want a dock to aid launching/ landing.

Which of the following are most important to have at a public boat launch? [Aided/ Multiple Mentions]

Important to have at a public boat launch	Total (weighted)	Own a motorized boat	Do not own a motorized boat
Sample Size	2,893	2,312	581
Total (weighted)	591,546	530,206	61,339
Dock to aid launching/ landing	79%	82%	52%
Toilets	54%	53%	63%
Large parking lot with many spaces	52%	54%	34%
Multiple launch lanes/ ramps	40%	42%	19%
Map of the lake showing boating restrictions	27%	27%	30%
A place to put weeds/ aquatic invasive species/ etc.	27%	27%	23%
Map of the lake showing water depth and hazards	24%	24%	29%
Lighting	24%	25%	13%
Paved parking lot	22%	23%	10%
Tools for cleaning weeds and aquatic invasive species	20%	20%	16%

4d. Greater Minnesota vs Metro

One-third (34%) of Greater Minnesota recreational boaters do not feel overcrowding is an issue while boating compared to 26% of those who live in the Metro region.

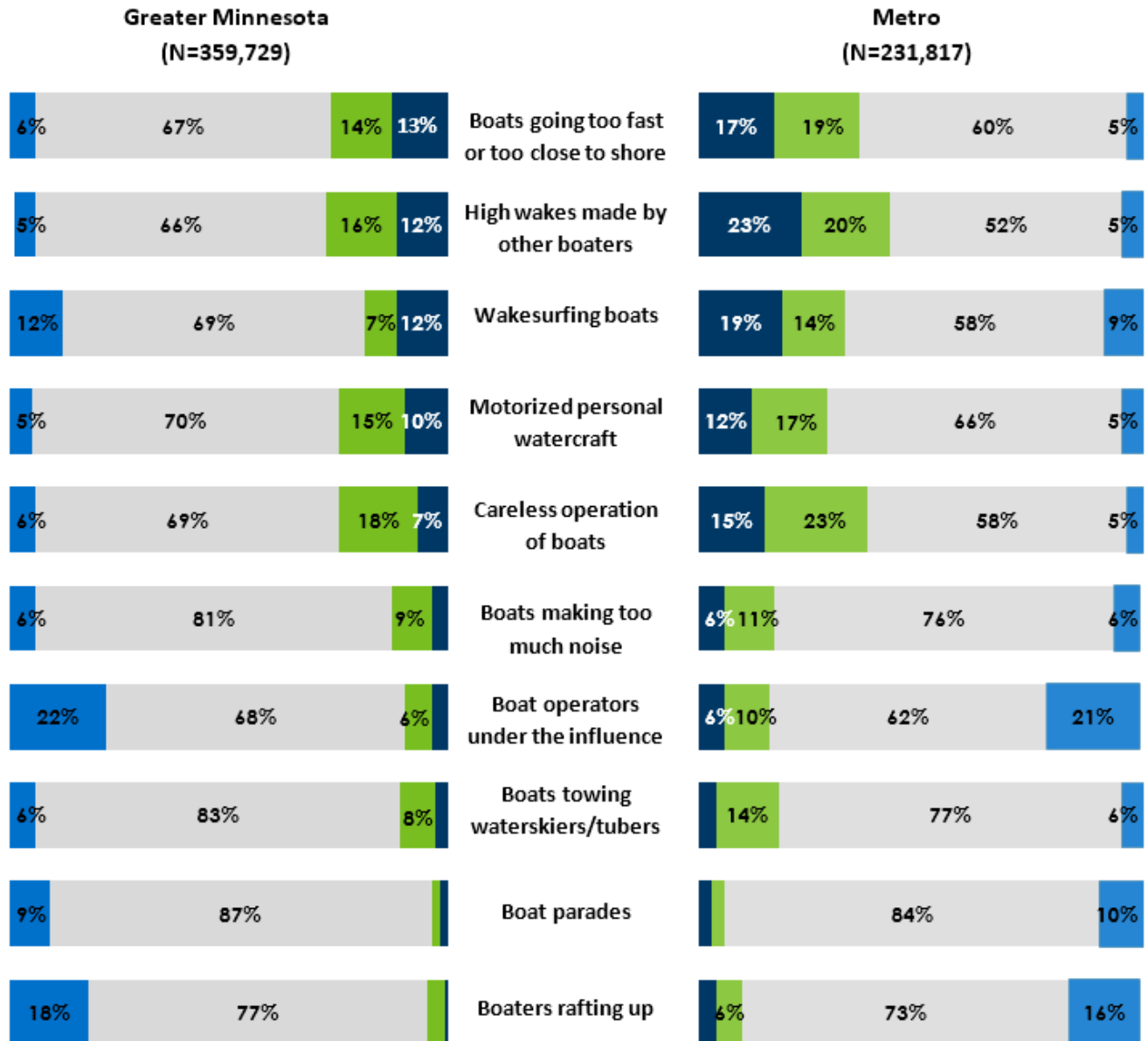
About three-quarters of both regions have the perception that there is overcrowding 25% or less of the time while boating.

About what percentage of the time was there crowding/ too many boats while you were boating this past season (2020)? [Aided]

Percentage of time there was overcrowding/ too many boats	Total (weighted)	Recreational boaters in Greater Minnesota	Recreational boaters in Metro
Sample Size	2,893	1,356	1,537
Total (weighted)	591,546	359,729	231,817
0%	31%	34%	26%
10%	29%	30%	27%
25%	19%	16%	23%
50%	11%	10%	13%
75%	3%	2%	5%
100%	1%	1%	1%
Not sure	6%	6%	5%

Recreational boaters in Greater Minnesota feel the biggest problems are high wakes (28%), boats going too fast (27%), personal watercraft (25%), and careless operation of boats (25%). About half (43%) of the recreational boaters in the Metro area feel high wakes from other recreational boaters is the biggest problem followed by careless operation of boats (38%), boats going too fast (36%), and wake-surfing boats (33%).

Based on your boating experience this past season (2020), how much of a problem is the following on lakes and rivers in MN?



Note: Percentages less than 5% are not displayed

■ Problem ■ Moderate Problem ■ Not a problem ■ Other

Section 5: Appendix 1 - Detailed Data Charts

Region	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Total Greater MN	61%
Greater MN (motor only)	48%
Greater MN (non-motor only)	7%
Greater MN (motor and non)	6%
Total Metro	39%
Metro (motor only)	28%
Metro (non-motor only)	7%
Metro (motor and non)	4%

Gender	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Male	74%
Female	25%

Age	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Under 45	15%
45 to 54	13%
55 to 64	30%
65 and older	41%

Household income	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Less than \$50K	13%
\$50K to \$74,999	18%
\$75K to \$99,999	17%
\$100K or more	41%
Refuse	11%

Household income	Total (weighted)
Population	4,316,816
Less than \$50K	32%
\$50K to \$74,999	16%
\$75K to \$99,999	16%
\$100K or more	36%

Education	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
HS grad/ GED	13%
Some college/ no degree	14%
Associate/ Vocational/ Technical degree	25%
Bachelor's degree	27%
Graduate degree	19%
None of these	1%

Education	Total (weighted)
Population	4,316,816
HS grad/ GED	26%
Some college/ no degree	18%
Associate/ Vocational / Technical degree	16%
Bachelor's degree	21%
Graduate degree	10%
None of these	8%

Years boating	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Less than 10	11%
11 to 20	12%
21 to 30	15%
31 to 40	18%
41 to 50	23%
More than 50	21%

Own a waterfront home	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
No	51%
Permanent home	19%
Seasonal home	25%
Multiple properties	3%

Types of boats owned (aided, allowed more than one mention)	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
Motorized (less than 17 ft)	34%
Motorized (17ft to 19ft)	35%
Motorized (20ft or more)	21%
Kayak	35%
Pontoon	32%
Canoe	31%
Other non-motorized	14%
Personal watercraft	14%

Number of boats owned	Total (weighted)
Sample Size	2,893
Total (weighted)	591,546
One	39%
Two	26%
Three	14%
Four	9%
Five or more	10%

Based on your boating experience this past season (2020), how much of a problem is the following on lakes and rivers in MN?

1

Sample size 2,893

Total (weighted) 591,546

Attribute	Problem	Moderate problem	No problem	Other
High wakes made by boaters	16%	18%	61%	5%
Wake-surfing boats	15%	9%	65%	11%
Boats going too fast or too close to shore/ docks	14%	16%	64%	6%
Motorized personal watercraft (Jet Ski)	11%	16%	68%	6%
Careless/ inconsiderate operation of boats	10%	20%	65%	5%
Boats making too much noise	5%	10%	79%	6%
Boat operators under the influence of alcohol	5%	8%	66%	22%
Boats towing water skiers, tubers, etc.	3%	10%	81%	6%
Boaters rafting up	2%	5%	76%	17%
Boat parades	2%	2%	86%	9%

[ONLINE QUESTION ONLY]

How satisfied are you with the following aspect of the MN water recreation system and safety program? The question includes 37% of the total sample.

2

Sample size 1,165

Total (weighted) 217,493

Attribute	Satisfied	In the middle	Dissatisfied
The overall water recreation system in MN	87%	12%	2%
Information about boating opportunities/ rules/ maps	76%	22%	2%
Boating safety education	71%	25%	4%
Enforcement of boating regulations	70%	22%	7%

IF USED A PUBLIC BOAT LAUNCH IN MINNESOTA THIS PAST SEASON: How satisfied are you with MN's boat launches and access sites? The question includes 81% of the total sample.

3

Sample size 2,367

Total (weighted) 480,600

Attribute	Satisfied	In the middle	Dissatisfied
Availability of public boat launches and access sites	88%	9%	2%
Quality of public boat launches and access sites	79%	13%	4%

For the money you currently pay to register your boat(s), what value do you feel you are getting?

4

Total (weighted) for registered motorized boats 527,950

Total (weighted) for registered non-motorized boats 361,073

Type of boat	Excellent/ good	Average	Fair/ poor	Unsure
Motorized	54%	24%	17%	5%
Non-motorized	48%	18%	24%	11%

Based on your boating experience this past season (2020), how much of a problem is the following on lakes and rivers in Minnesota?

5

Sample size for Greater Minnesota 1,356

Total (weighted) for Greater Minnesota 359,729

Attribute	Problem	Moderate problem	No problem	Other
Boats going too fast or too close to shore/ docks	13%	14%	67%	6%
High wakes made by boaters	12%	16%	66%	5%
Wake-surfing boats	12%	7%	69%	12%
Motorized personal watercraft (Jet Ski)	10%	15%	70%	5%
Careless/ inconsiderate operation of boats	7%	18%	69%	6%
Boats making too much noise	4%	9%	81%	6%
Boat operators under the influence of alcohol	4%	6%	68%	22%
Boats towing water skiers, tubers, etc.	3%	8%	83%	6%
Boat parades	2%	2%	87%	9%
Boaters rafting up	1%	4%	77%	18%

Based on your boating experience this past season (2020), how much of a problem is the following on lakes and rivers in Minnesota?

6

Sample size for Greater Minnesota 1,537

Total (weighted) for Greater Minnesota 231,817

Attribute	Problem	Moderate problem	No problem	Other
Boats going too fast or too close to shore/ docks	17%	19%	60%	5%
High wakes made by boaters	23%	20%	52%	5%
Wake-surfing boats	19%	14%	58%	9%
Motorized personal watercraft (Jet Ski)	12%	17%	66%	5%
Careless/ inconsiderate operation of boats	15%	23%	58%	5%
Boats making too much noise	6%	11%	76%	6%
Boat operators under the influence of alcohol	6%	10%	62%	21%
Boats towing water skiers, tubers, etc.	4%	14%	77%	6%
Boat parades	3%	3%	84%	10%
Boaters rafting up	4%	6%	73%	16%