

**Guided Wildlife Viewing Tour Operator Survey**  
**Monterey Bay Region, California**

**This is a voluntary survey.**

The public reporting burden for this collection of information is estimated to average 2.5 hours including the time for reviewing instructions, searching for existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other suggestions for reducing this burden to: Dr. Danielle Schwarzmann, NOAA National Ocean Service, Office of National Marine Sanctuaries, 1305 East-West Highway, Silver Spring, MD 20910. Responses provided for this survey will be anonymous. No personally identifiable information is being collected with this survey; responses will not be attributed to individual businesses. Notwithstanding any other provisions of the law, no person is required to respond to, nor shall any person be subjected to a penalty for failure to comply, with a collection of information subject to the requirements of the Paperwork Reduction Act unless that collection of information displays a currently valid OMB Control Number.

**GENERAL INFORMATION**

Respondent ID Number \_\_\_\_\_  
(assigned by interviewer)

*All questions should be answered by the business owner, unless the owner has specified someone better suited to provide a response.*

*Questions 1-5 are regarding the business owner.*

1. Which of the following includes your age?  
 18-30     31-40     41-50     51-60     over 60
  
2. Are you Hispanic or Latino?  
 YES     NO
  
3. What is your race? (Mark all that apply)  
 White     Black or African American     American Indian or Alaska Native  
 Asian     Native Hawaiian or Other Pacific Islander  
 Other: \_\_\_\_\_
  
4. What is your gender?  
 Male     Female     Decline to state
  
5. How many family members do you support (including yourself)?  
Myself only    2    3    4    5    6    7    Greater than 7
  
6. What is your primary port/marina/location?  
\_\_\_\_\_

7. Do you have a secondary port/marina/location from where you operate part of the year?  
 YES  NO

7a. If YES, which one? \_\_\_\_\_

8. How many years have you been an ocean recreation business owner?  
\_\_\_ (number of years)

9. How many years have you been an ocean recreation business owner in the Monterey Bay region?  
\_\_\_ (number of years)

10. Do you visit state marine protected areas (reserves/conservation areas) specifically during your tours? (Interviewer—Please show state MPA map to identify specific quadrants)  
 YES  NO

10a. Why or why not?  
\_\_\_\_\_

10b. How often?  
\_\_\_\_\_

10c. If YES, how many years have you conducted guided wildlife tours in state marine protected areas? \_\_\_ (number of years)

*Question 11 is for whale watching operators only:*

11. Do you currently have a naturalist on board during whale watching trips?  
 YES  NO

11a. If NO, would you be interested in having one on board if you had more information about the role they play with whale watching operators?  YES  NO

12. Are customers targeting particular wildlife species when they go on a guided tour?  
 YES  NO

12a. If YES, please list: \_\_\_\_\_

13. How would you describe the wildlife viewing operation? (Mark one or more)
- Full-time whale watching operation       Part-time whale watching operation  
 Seasonal whale watching operation
- Full-time kayaking operation       Part-time whale watching operation  
 Seasonal kayaking operation
- Full-time dive/snorkeling operation       Part-time whale watching operation  
 Seasonal dive/snorkeling operation
- Full-time seabird viewing operation       Part-time whale watching operation  
 Seasonal seabird viewing operation
- Full-time sailing/boating operation       Part-time whale watching operation  
 Seasonal sailing/boating operation
- Full-time recreational fishing operation       Part-time whale watching operation  
 Seasonal recreational fishing operation
- Full-time combination whale watching, recreational cruises, kayaking,  
diving/snorkeling, and wildlife observation operation
- Part-time combination whale watching, recreational cruises, kayaking,  
diving/snorkeling, and wildlife observation
- Seasonal combination whale watching, recreational cruises, kayaking,  
diving/snorkeling, and wildlife observation.

13a. If part time or seasonal, which months?

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14. Number of boats/vessels at the operation:  
 (number of vessels)

*Question 15-19 are for specific types of operators:*

15. Average number of whale watching participants per vessel in operation:  
Vessel 1:  watchers      Vessel 2:  watchers  
Vessel 3:  watchers      Vessel 4:  watchers

16. Average number of participants per vessel in recreational fishing cruise operation:  
Vessel 1:  participants      Vessel 2:  participants  
Vessel 3:  participants      Vessel 4:  participants

17. Average number of kayakers and kayaks per guided tour:  
 kayakers       kayaks

18. Average number of divers/snorkelers per vessel in operation:

Vessel 1: \_\_\_ divers/snorkelers    Vessel 2: \_\_\_ divers/snorkelers  
Vessel 3: \_\_\_ divers/snorkelers    Vessel 4: \_\_\_ divers/snorkelers

19. Average number of wildlife observers (seabirds and other) per vessel in operation (capacity):

Vessel 1: \_\_\_ seabird observers    \_\_\_ other wildlife observers  
Vessel 2: \_\_\_ seabird observers    \_\_\_ other wildlife observers  
Vessel 3: \_\_\_ seabird observers    \_\_\_ other wildlife observers  
Vessel 4: \_\_\_ seabird observers    \_\_\_ other wildlife observers

20. Number of employees at the operation:

Full time \_\_\_\_\_  
Part time \_\_\_\_\_  
Seasonal \_\_\_\_\_

21. Number of vessel trips/guided tours per day (primary purpose):

Whale watching \_\_\_\_\_  
Recreational cruise (sailing, boating) \_\_\_\_\_  
Fishing \_\_\_\_\_  
Kayaking \_\_\_\_\_  
Diving/snorkeling \_\_\_\_\_  
Seabird viewing \_\_\_\_\_

*Question 22 should be answered only if the person responding has been in the guided wildlife tour industry for 10 years or more.*

22. In your opinion, on a scale of 1 to 5, how has the quality of the guided wildlife tour industry changed in the last 10 years?

- 1 – Much worse
- 2 – Somewhat worse
- 3 – No change
- 4 – Somewhat better
- 5 – Much better
- No opinion

22a. If you believe that the quality of guided tours has changed, could you tell us how it's changed?

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22b. Are you the owner of the business you are representing?

\_\_\_ YES    \_\_\_ NO

23. Are you aware that wildlife in the region are sometimes unintentionally harassed?  
 YES  NO

23a. If YES, how concerned are you that harassment to wildlife (whales, pinnipeds, sea otters, and seabirds) may be having a negative impact on your business, with 1 being not concerned and 5 being extremely concerned?

- 1 – Not at all concerned
- 2 – Slightly concerned
- 3 – Somewhat concerned
- 4 – Moderately concerned
- 5 – Extremely concerned
- No opinion

24. Currently, there are no regulations in MBNMS that require an "approach distance" to whales and other wildlife. However, there are official NOAA Fisheries guidelines that recommend wildlife viewing vessels maintain a minimum distance of 100 yards/meters from whales and wildlife. Does your operation have any kind of established policy regarding a minimum distance your vessels maintain from whales and wildlife?

YES  NO

24a. If YES, what is your company's approach distance policy?

- 0-50 yards/meters
- 50-100 yards/meters
- 100-150 yards/meters
- More than 150 yards/meters

25. Please give a brief explanation on how you think your business could be affected if a mandatory regulation were to be passed that would require an approach distance to whales and other wildlife.

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26. The Marine Mammal Health and Stranding Response Program authorizes a group of unpaid volunteers to respond to sightings of whales entangled in fishing gear and other debris. This group is called the Whale Entanglement Team (WET), and they respond to a 24/7 WET hotline at (877) SOS-WHALE.

26a. Have you ever heard of the Whale Entanglement Team?

YES  NO

26b. Have you/any of your employees ever called the WET hotline?

YES  NO

Please explain your response (i.e. reason why you called, did not call because you were not aware of program, did not call because you never encountered an entangled whale, etc.)

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26c. Does your company have a policy about responding to injured or entangled wildlife?  
 YES  NO

If YES, what is your company's policy about responding to injured or entangled wildlife?

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27. Would you be interested in learning more about how your company can respond to injured or entangled wildlife?

YES  NO

27a. If YES, how would you like to receive information? (Check all options that apply)

Attend a seminar during business hours with other interested local wildlife tour operators

Attend a seminar after business hours with other interested local wildlife tour operators

Attend a webinar/online seminar with other interested local wildlife tour operators

Receive physical pamphlets/handouts/reading materials that are mailed to the business

Receive electronic pamphlets/handouts/reading materials that are emailed to the business

Receive an in-person training from an trained expert during business hours at your business

28. To the best of your knowledge, please rank the status/condition of the following resources in Monterey Bay National Marine Sanctuary, where 1 is much better and 5 is much worse.

RESOURCE	Better	←—————→				Worse	
a. Water Quality	1	2	3	4	5	N/A	
b. Marine Debris/Ocean Pollution	1	2	3	4	5	N/A	
c. Wildlife (whales, otters, pinnipeds)	1	2	3	4	5	N/A	
d. Habitats (tidepools, beaches, kelp forests)	1	2	3	4	5	N/A	
e. Introduced Species	1	2	3	4	5	N/A	
f. Sensitive Areas (haulout, roosting, nesting)	1	2	3	4	5	N/A	

29a. Are there any categories listed above, in Question 28, where MBNMS been successful?  
(List all that apply)

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29b. Are there any categories listed above, in Question 28, where MBNMS been unsuccessful?  
(List all that apply)?

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**ECONOMIC INFORMATION**

30. What approximate percentage of the TOTAL business income is derived from guided wildlife viewing operations? \_\_\_\_%

31. What approximate percentage of your TOTAL household income is derived from guided wildlife viewing operations? \_\_\_\_%

32. Please list any outstanding balance on loan amounts for vessels and equipment.  
\$ \_\_\_\_\_

33. Please provide your best estimate for the following expenses last year:  
 Permits/licenses \$ \_\_\_\_\_  
 Docking fees \$ \_\_\_\_\_

Interest payments on vessel(s)	\$ _____
P&I insurance on vessel(s)	\$ _____
Maintenance/repair on vessel/electronic equipment	\$ _____
Maintenance/repair on dive/snorkel gear	\$ _____
Maintenance/repair on rods/reels	\$ _____
Maintenance/repair on compressors	\$ _____
Maintenance/repair on other equipment	\$ _____
Other dive equipment costs	\$ _____
Advertising	\$ _____
Office rent/mortgage	\$ _____
Office utilities (electric, water, telephone, Internet)	\$ _____
Depreciation of vessels and equipment	\$ _____
Business taxes	\$ _____
Other (specify):	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

33a. Please provide your best estimate of the replacement value of the following items that you used last year (fill in year \_\_\_\_\_):

Vessel(s) and electronic equipment	\$ _____
Diving and snorkeling gear	\$ _____
Compressors	\$ _____
Rods/reels	\$ _____
Other gear (specify):	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

34. Please provide your best estimate for the following trip related expenses last year:

Dive equipment costs	\$ _____
Fuel/oil	\$ _____
Ice	\$ _____
Food/supplies	\$ _____
Bait	\$ _____
Captain wages & salaries (if not owner-captain)	\$ _____
Crew wages & salaries      Number _____	\$ _____
Other (specify):	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

35. Please provide your best estimate of total business revenues last year.

\$ \_\_\_\_\_



36. Please provide your best estimate of total revenues and/or percent of total revenues last year in Monterey Bay National Marine Sanctuary.

\$ \_\_\_\_\_ % \_\_\_\_\_

*Questions 37 – 39 pertain to whale watching operators only:*

37. Does the number of whales seen per trip affect the profitability of that trip?

\_\_\_ YES \_\_\_ NO

If you answered 'yes' to question 37, then

What is the minimum number of whales that need to be seen per trip in order to make the trip profitable? \_\_\_\_\_

38. What is the minimum number of customers/attendants that need to be booked per trip in order to make the trip profitable? \_\_\_\_\_

39. If you do not see any whales on a trip, do you reimburse customers? \_\_\_ YES \_\_\_ NO

39a. If YES, how do you reimburse customers?

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40. Use by activity and month:

Intensity of Use: For each Activity, please answer the following questions

1. In what part of the year (months) did you participate or operate trips for this activity?
2. For each month how many trips did you go on?
3. On average, how many days long are each trip for each activity? Did this vary from month to month?
4. On average, how many passenger do you carry per trip for each activity? Did this vary from month to month?
5. From the above information, calculate person-days for each month and activity.
6. In what time-period do you operate, if it was less than all month (e.g. 1st two weeks)?

Activity	Months	Trips	Days Per Trip	Passengers Per Trip	Person- Days	Time Period
Activity 1	JAN	_____	_____	_____	_____	_____
	FEB	_____	_____	_____	_____	_____
	MAR	_____	_____	_____	_____	_____
	APR	_____	_____	_____	_____	_____
	MAY	_____	_____	_____	_____	_____
	JUN	_____	_____	_____	_____	_____
	JUL	_____	_____	_____	_____	_____
	AUG	_____	_____	_____	_____	_____
	SEP	_____	_____	_____	_____	_____
	OCT	_____	_____	_____	_____	_____
	NOV	_____	_____	_____	_____	_____
	DEC	_____	_____	_____	_____	_____
Activity 2	JAN	_____	_____	_____	_____	_____
	FEB	_____	_____	_____	_____	_____
	MAR	_____	_____	_____	_____	_____
	APR	_____	_____	_____	_____	_____
	MAY	_____	_____	_____	_____	_____
	JUN	_____	_____	_____	_____	_____
	JUL	_____	_____	_____	_____	_____
	AUG	_____	_____	_____	_____	_____
	SEP	_____	_____	_____	_____	_____
	OCT	_____	_____	_____	_____	_____
	NOV	_____	_____	_____	_____	_____
	DEC	_____	_____	_____	_____	_____
Activity 3	JAN	_____	_____	_____	_____	_____
	FEB	_____	_____	_____	_____	_____
	MAR	_____	_____	_____	_____	_____
	APR	_____	_____	_____	_____	_____
	MAY	_____	_____	_____	_____	_____
	JUN	_____	_____	_____	_____	_____
	JUL	_____	_____	_____	_____	_____
	AUG	_____	_____	_____	_____	_____
	SEP	_____	_____	_____	_____	_____
	OCT	_____	_____	_____	_____	_____
	NOV	_____	_____	_____	_____	_____
	DEC	_____	_____	_____	_____	_____
Activity 4	JAN	_____	_____	_____	_____	_____
	FEB	_____	_____	_____	_____	_____
	MAR	_____	_____	_____	_____	_____
	APR	_____	_____	_____	_____	_____
	MAY	_____	_____	_____	_____	_____
	JUN	_____	_____	_____	_____	_____
	JUL	_____	_____	_____	_____	_____
	AUG	_____	_____	_____	_____	_____
	SEP	_____	_____	_____	_____	_____
	OCT	_____	_____	_____	_____	_____
	NOV	_____	_____	_____	_____	_____
	DEC	_____	_____	_____	_____	_____

#### 41. Mapping Exercise: Map the Distribution of Each Activity

Respondents will be advised to provide information on their anticipated spatial use of the Monterey Bay. This anticipated spatial use may be the same as their current use or it may be different. Respondents will be given a 100 penny budget, meaning one penny equals one percent of passenger activity. The respondent will allocate his or her budget across all map cells. Codes will be recorded on the coding sheet. The map cells will be referenced by column and row: For example, C1R1 1% means 1% of activity is in cell Column 1 Row 1. The percent of each activity must add up to 100.

42. Does this map reflect where you presently operate?  
\_\_\_YES \_\_\_NO

42a. If NO, please explain why future operations may be different than where you have historically operated.

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