Canal & River Trust

Keeping people, nature & history connected

Boat Owners Survey

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providing *intelligence*

Topics covered

- Key performance measures
- General upkeep and performance
- Customer service (including licence renewal)
- Use of boats
- Boater demographics and views
- Mooring (home and residential)
- Canal & River Trust – potential support
- Membership of waterway organisations

The Survey

What?

A bi-annual survey created to:

Monitor the demographic profile of boat owners

Assess levels of satisfaction

Obtain information on boating related behavior

Identify key areas of improvement for the future

When?

March - April 2012

As this was early in the year, we are attributing views in this presentation as relating to experience of boating during 2011

How?

The survey was carried out using the internet for the first time. This meant we could contact many more people and achieve a much greater response than in previous years – a total of 3,588

Quick summary - 1

Overall Satisfaction

72% quite or very satisfied. Wales & Borders and West Midlands rank highest; K&A and North West lowest.

> Comment from our research agency on how this compares with other leisure sector surveys: *"These tend to measure enjoyment with an overall experience, while our survey relates specifically to navigation authority service so it is hard to compare."*
>
> A recent Broads Authority survey recorded 'excellent' or 'good' satisfaction levels for BA's three yacht stations between 65% an 80%

Upkeep of Waterways

Depth of water and clearance of rubbish, litter and weed are areas of concern

Provision of facilities

Average ratings dropped from just above 3 (on 5 point scale) in 2009 to just below 3

Value for Money

Dip in Value for Money rating with 76% reporting it OK or better. In 2009 it was 84%.

Quick summary - 2

Use of boats

In common with other leisure sectors, more frequent trips were taken, albeit of shorter lengths – people tending to squeeze more value out of what they own.

> *Average days spent cruising rose to 65 from 58 in 2009 with number of day trips up by 30%. This probably explains why the increase was not reflected in our lockage statistics.*

Primary use of boat is residential (for all or part of the year) for 28% of boaters.

This is consistent with a marked increase in the number of boats licensing as continuous cruisers (up from 3,200 in 2007 to 4,300 in 2012). 31% of continuous cruisers said they would like a residential mooring – increasing provision of these is a priority for us

Licence processing

Big improvement in licence processing. 88% now completed within target of 15 days. This is up from 74% in 2009.

"During the year, we increased advertising of our online option and set 'same day processing' targets for our back office team.

Boater and boat use profiles

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Profile of boaters

30036 [RF] © www.visualphotos.com

Two-thirds aged 55 or over

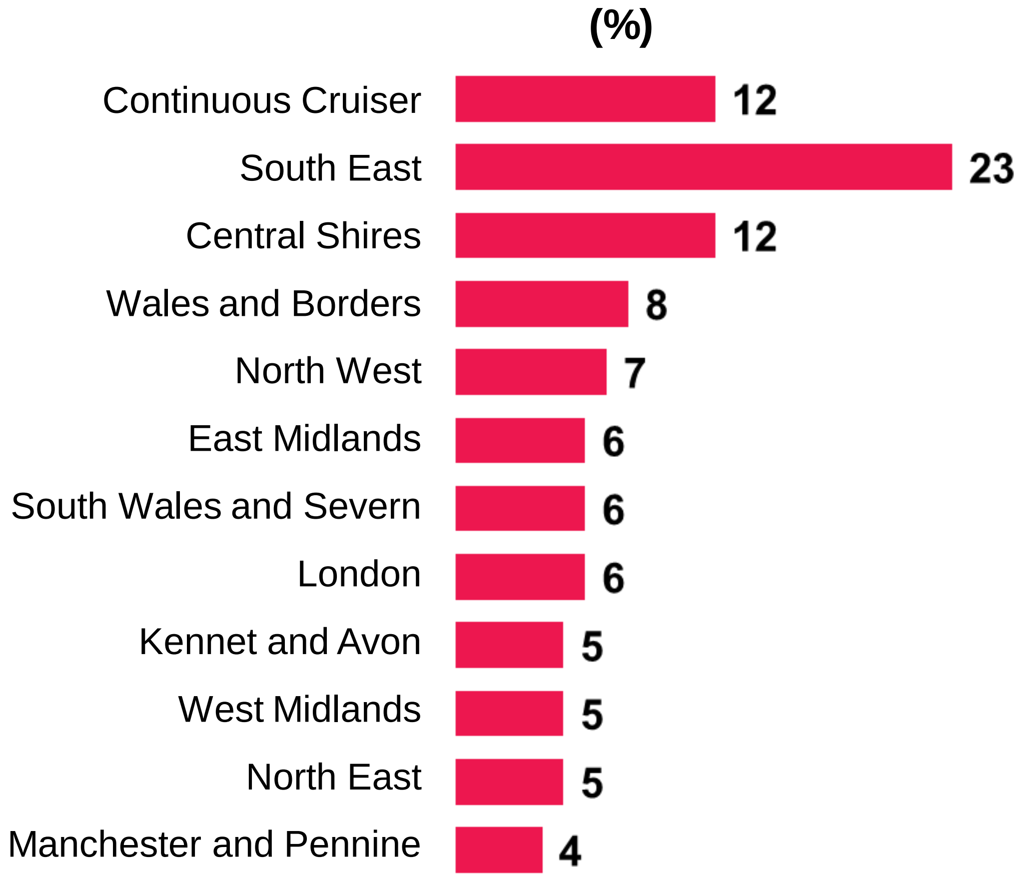
Three-quarters are couples, with only 15% travelling with children

Just under half have annual household incomes under £30k

Make 15 trips per year

Travel up to 15 miles per day, cruising for 5-6 hours

Where respondents' had their home mooring



Base: All
Source: 2011 (sample)

Boater profile –trends

		2011	2009	2008	2007	2006
Age:	**18 – 34**	**3**	**2**	**5**	**3**	**2**
	35 – 54	**27**	**28**	**36**	**31**	**32**
	55+	**68**	**67**	**57**	**63**	**62**
	Not stated	**2**	**3**	**2**	**3**	**2**
Gender:	**Male**	**79**	**78**	**79**	**81**	**84**
	Female	**18**	**21**	**20**	**17**	**14**
	Not stated	**3**	**1**	**1**	**2**	**1**
Income:	**Under £20K**	**23**	**23**	**24**	**26**	**n/a**
	£20 – 30K	**18**	**18**	**17**	**23**	**n/a**
	£30 – 50K	**25**	**24**	**24**	**19**	**n/a**
	Over £50K	**23**	**23**	**22**	**18**	**n/a**
	Not stated	**10**	**13**	**13**	**13**	**n/a**
Boat is residence*:	**Yes**	**15**	**17**	**18**	**11**	**13**
	No	**85**	**81**	**80**	**89**	**87**
	Not stated	**0**	**2**	**2**	**0**	**0**

*Note: question wording change in 2011
Base: All
Source: 2009 (Q57, Q58, Q62, Q60, Q32), 2011 (Q52, Q53, Q55, Q14)

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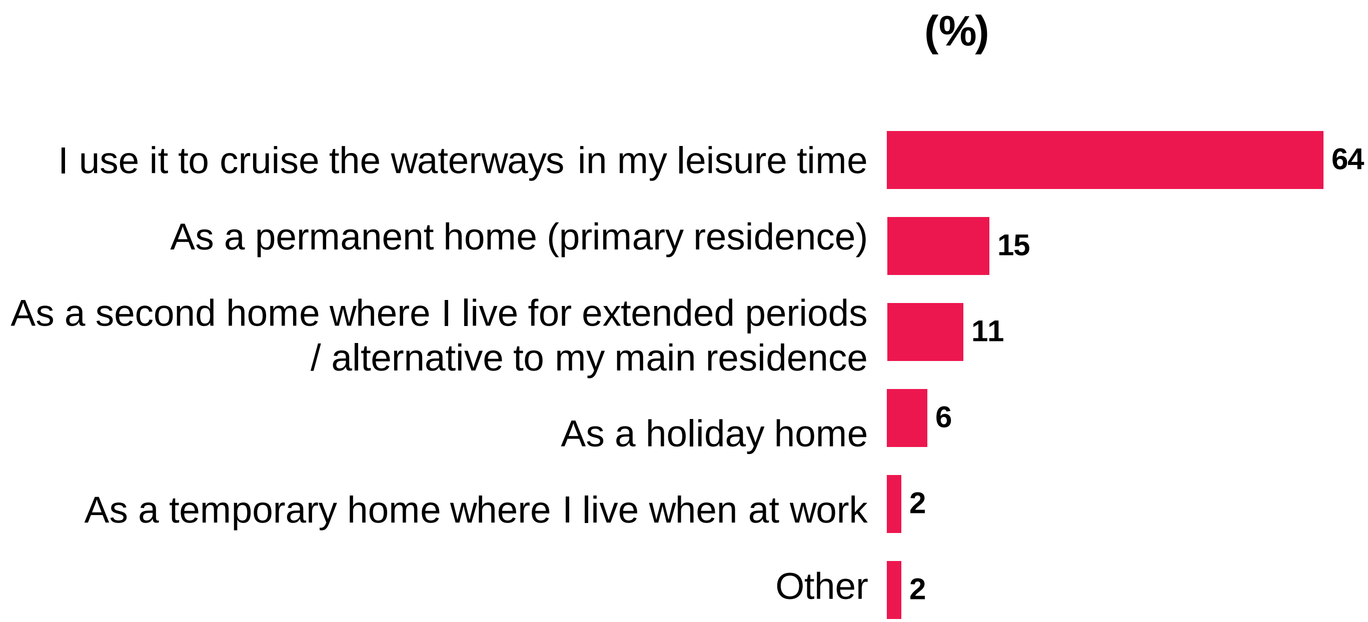
Primary use of boat

Q: Which of the following options best describes how you use your boat most of the time?



Base: All
Source: 2011 (Q14)

Profile of Continuous Cruisers: How do they differ?

SPENDING

Higher spend on licence fees, maintenance and fuel

Discretionary spend patterns similar, although total spend slightly less per day than other boaters. Less likely to spend in cafes/restaurants and more likely to use takeaways

SUPPORT FOR CANAL & RIVER TRUST

More likely to be in regular contact with the Trust by both phone and email

Slightly less likely to support financially than other boaters, but more likely to volunteer

MEMBERSHIPS

Less likely to be “joiners”: 38% vs. 52% among other boaters

15% IWA members vs. 29% of other boaters

8% local canal society members vs. 17% of other boaters

but 9% belong to Residential Boat Owners Assoc. vs. 4% of other boat owners

DEMOGRAPHICS

20% travel alone vs. 5% of other boaters (but still mainly couples)

Younger age profile: 48% under 55yrs vs. 28% of other boaters

Lower incomes: 48% less than £20k vs. 20% of other boaters

Less likely to have held licence a long time: 53% less than 5 years vs. 36% among other boaters

PERFORMANCE MEASURES

67% satisfied with boating experience: vs. 73% among other boaters

But value for money ratings similar

UPKEEP/FACILITIES

Overall upkeep rated slightly lower: 25% poor/very poor vs. 21% among other boaters

Negative gap for facilities provision larger: 37% poor/very poor vs. 25% among other boaters

CONGESTION

21% affected by congestion: vs. 28% among other boaters

Locks an issue as with other boaters, but also water points

14% feel there are too many boats vs. 27% of other boaters

Q: on approximately how many days in total did you spend cruising in the last 12 months?

	2009 (%)	2011 (%)
1 day or less	5.6	7.3
2 – 3 days	4.2	4.1
4 – 7 days	1.6	1.5
8 – 14 days	0.9	0.8
15 – 30 days	0.5	0.4
More than 30 days	0.4	0.7
Average number of trips (last 12 months)	**13.4**	**14.8**
Average number of days spent cruising (last 12 months)	**58**	**65**

Boaters appear to be squeezing as much as possible from their existing asset – a common feature of the current leisure market in testing economic situation

Note: Number of trips excludes continuous cruising
Base: All
Source: 2011 (Q45, Q39))

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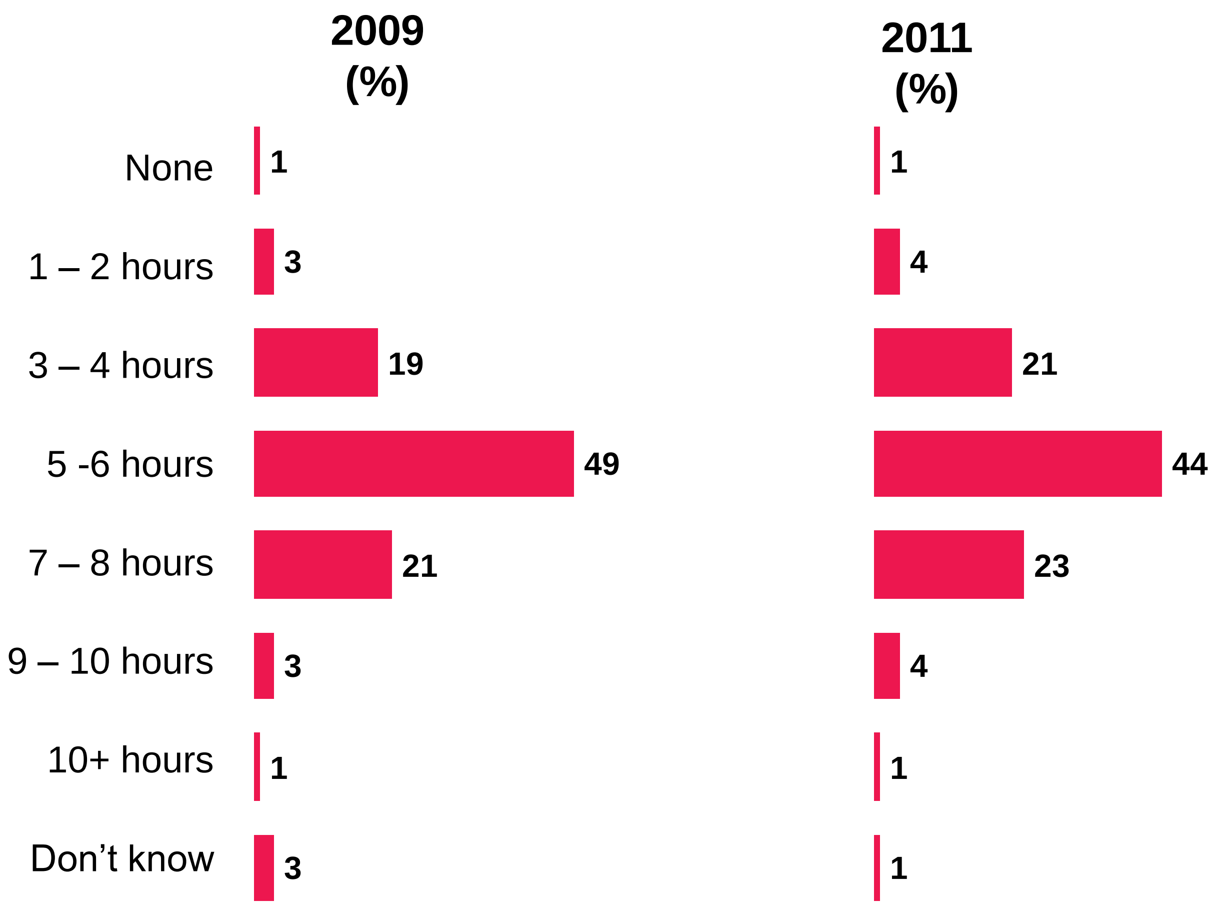
Hours spent cruising (typical cruising day)



Base: All
Source: 2009 (Q40), 2011 (Q41))

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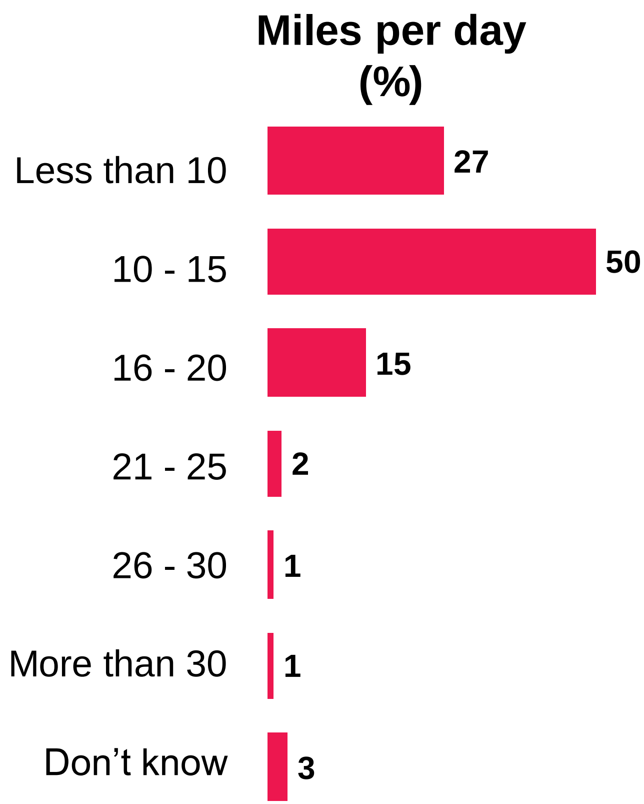
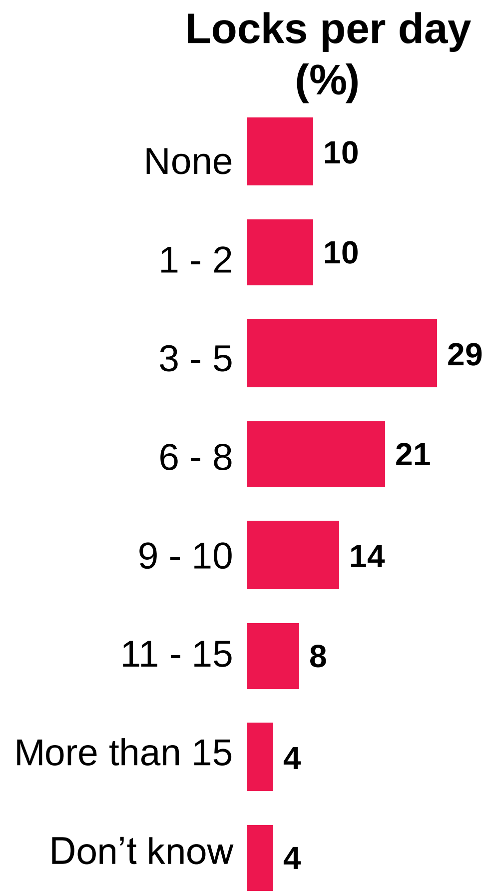
Distance travelled / number of locks (typical cruising day) (2011)





Base: All
Source: 2011 (Q40)

Typical spend on boat per annum

	ANNUAL SPEND
TOTAL	**£3,900**
Mooring fees	£2,000
Maintenance	£500
Licence fees	£700
Fuel	£350
Insurance	£250
Safety survey/work	£100

Base: All
Source: 2011 (Q6)

Key Performance Measures

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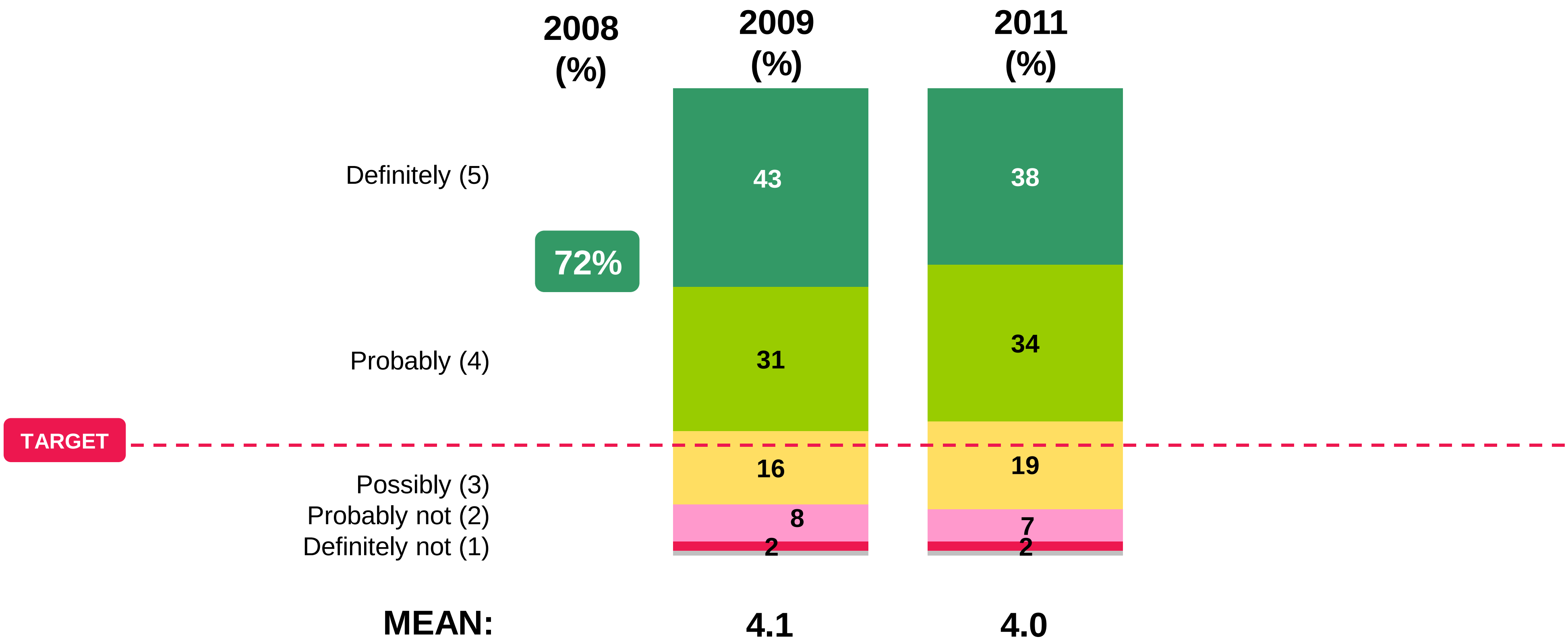
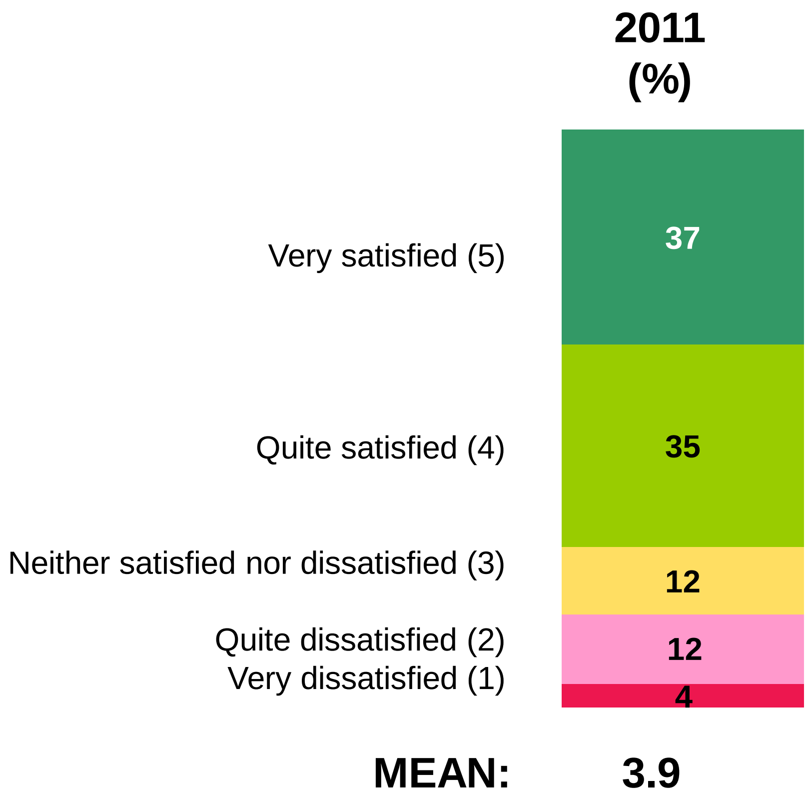
Q: How likely are you to recommend the waterways in this area to other boaters?



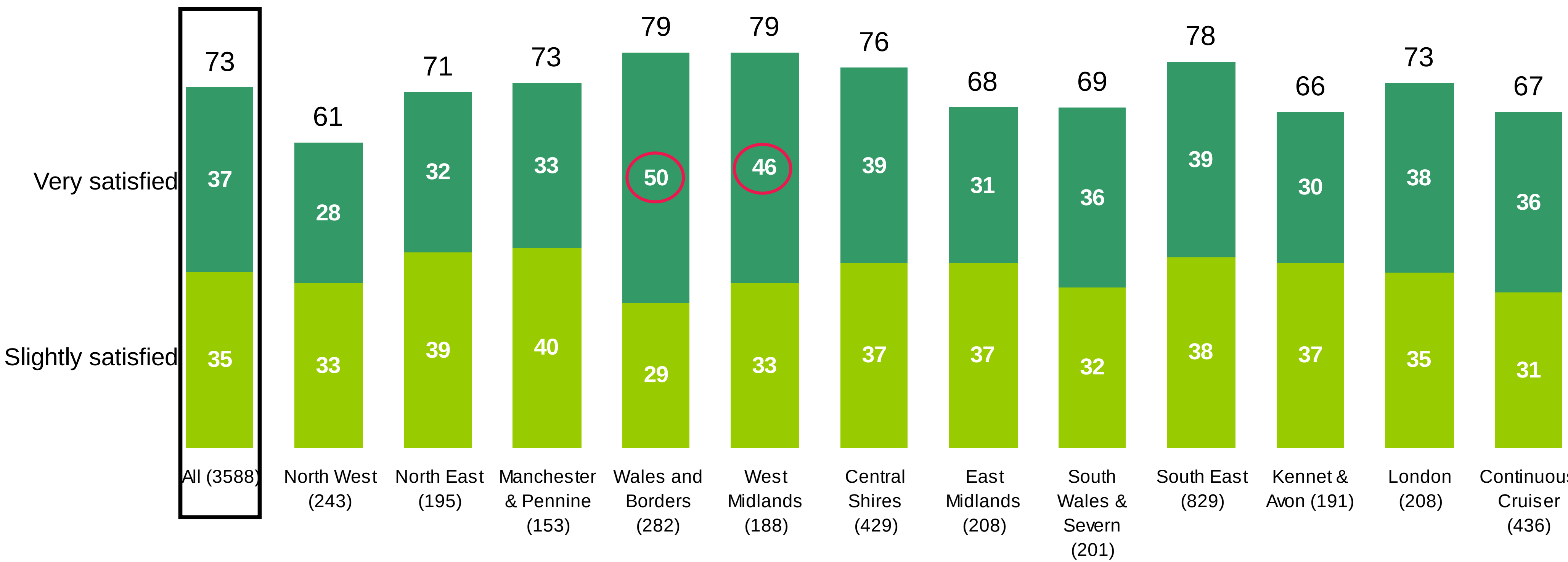
Base: All
Source: 2009 (Q3a), 2011 (Q4)

Q: Thinking about your boating on British Waterways canals and rivers over the last year (2011), overall how satisfied were you with your experience?



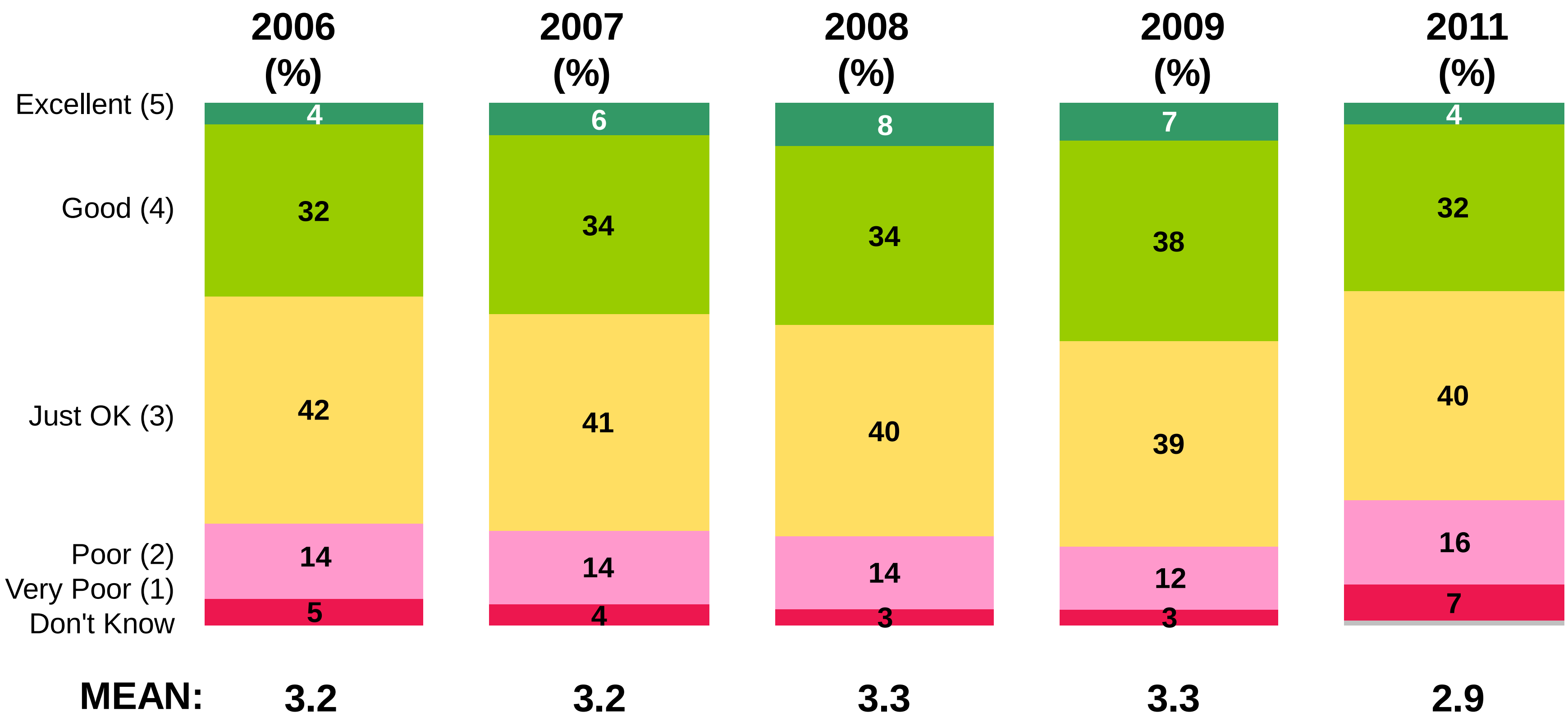
Base: All
Source: 2011 (Q2)

Q: Thinking about your boating on British Waterways canals and rivers over the last year (2011), overall how satisfied were you with your experience?



Base: All
Source: 2011 (Q2)

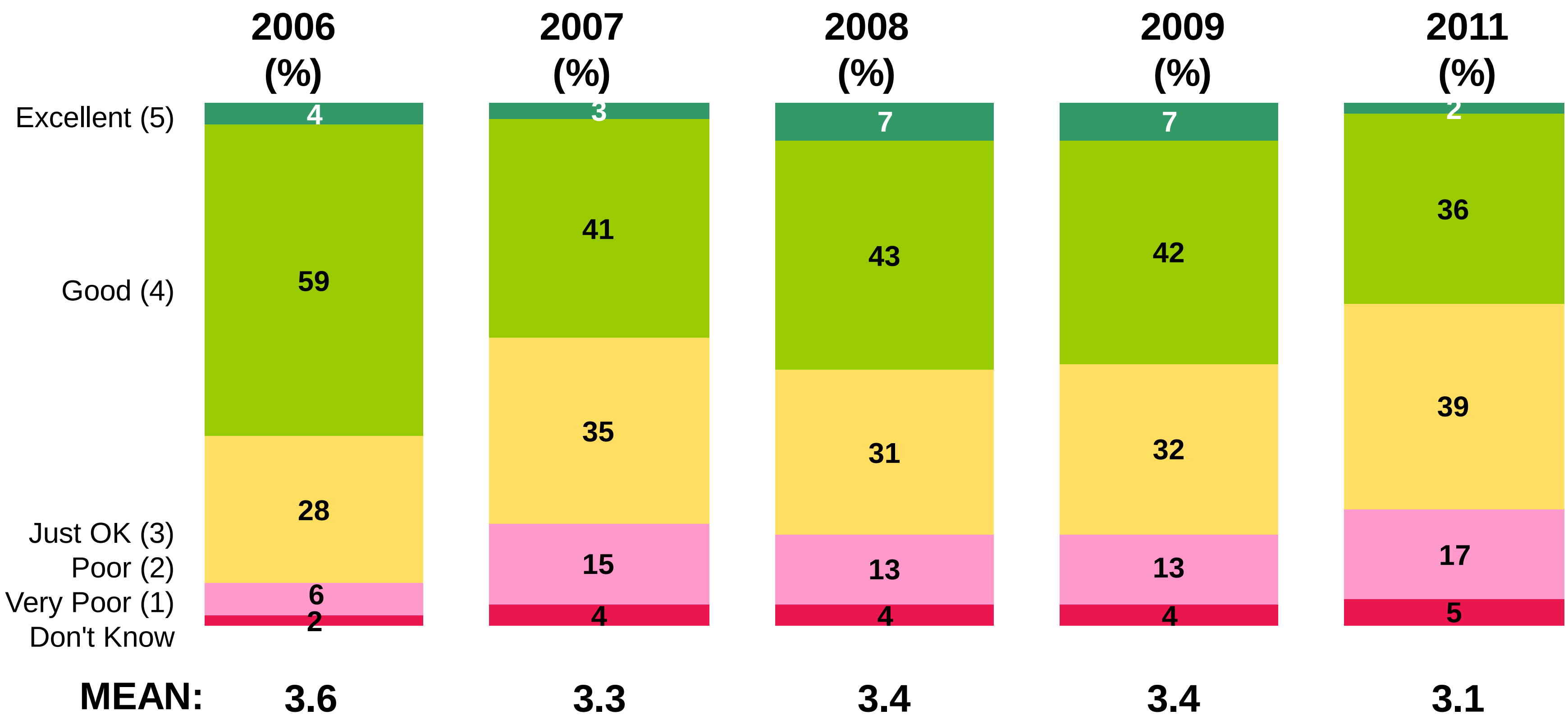
Q: How would you rate the value for money of your boating activities?



Since 2007, licence fees have risen by 2xRPI

Base: All
Source: 2009 (Q4), 2011 (Q5)

Q: Please indicate, using the scale provided, how you rate the quality of each of the following aspects of the waterways: **“overall upkeep of the waterways”**

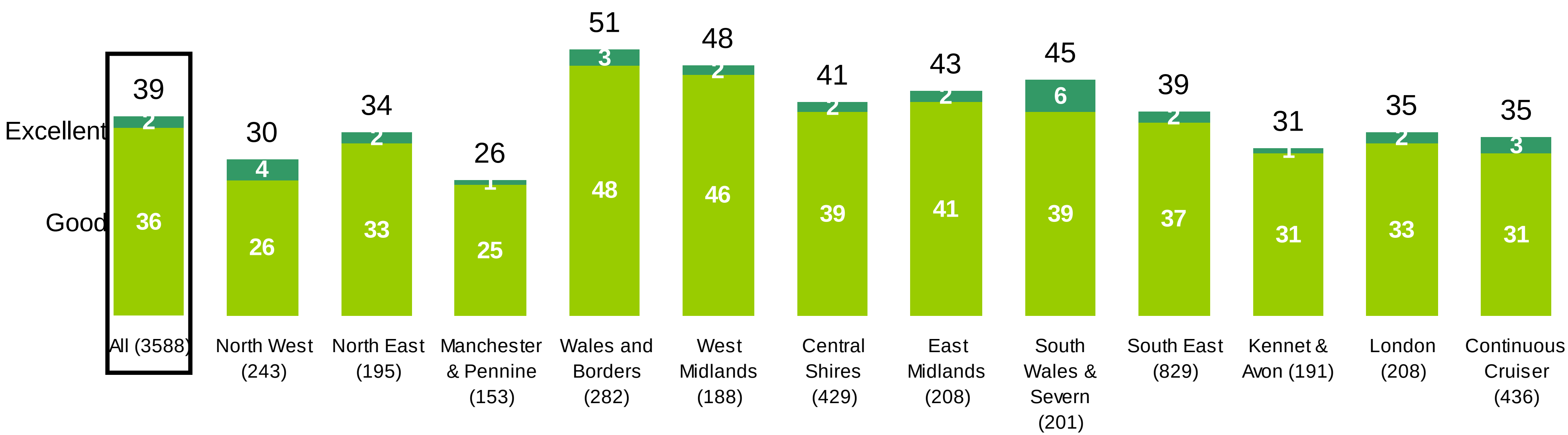


Budget allocation for maintenance has remained constant in cash terms during this period.

Base: All
Source: 2009 (Q5a), 2011 (Q6)

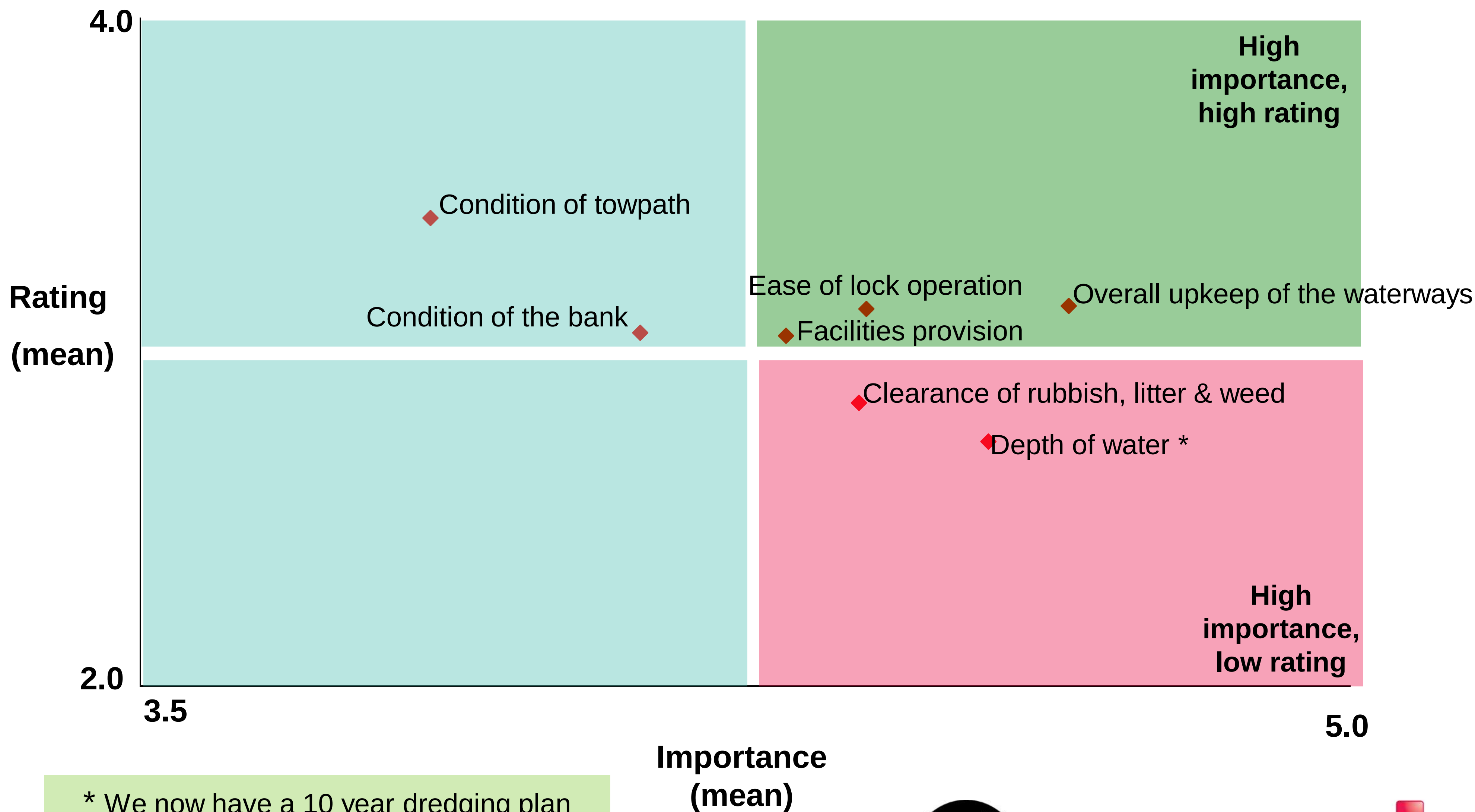
Overall upkeep ratings by region

Please indicate, using the scale provided, how you rate the quality of each of the following aspects of the waterways. *(Excellent Good Just okay Poor Very poor N/A)*



Base: All
Source: 2011 (Q6)

Depth of water and clearance of rubbish, litter and weed were the key areas of concern



* We now have a 10 year dredging plan

Base: All
Source: 2011 (Q6 / Q7)

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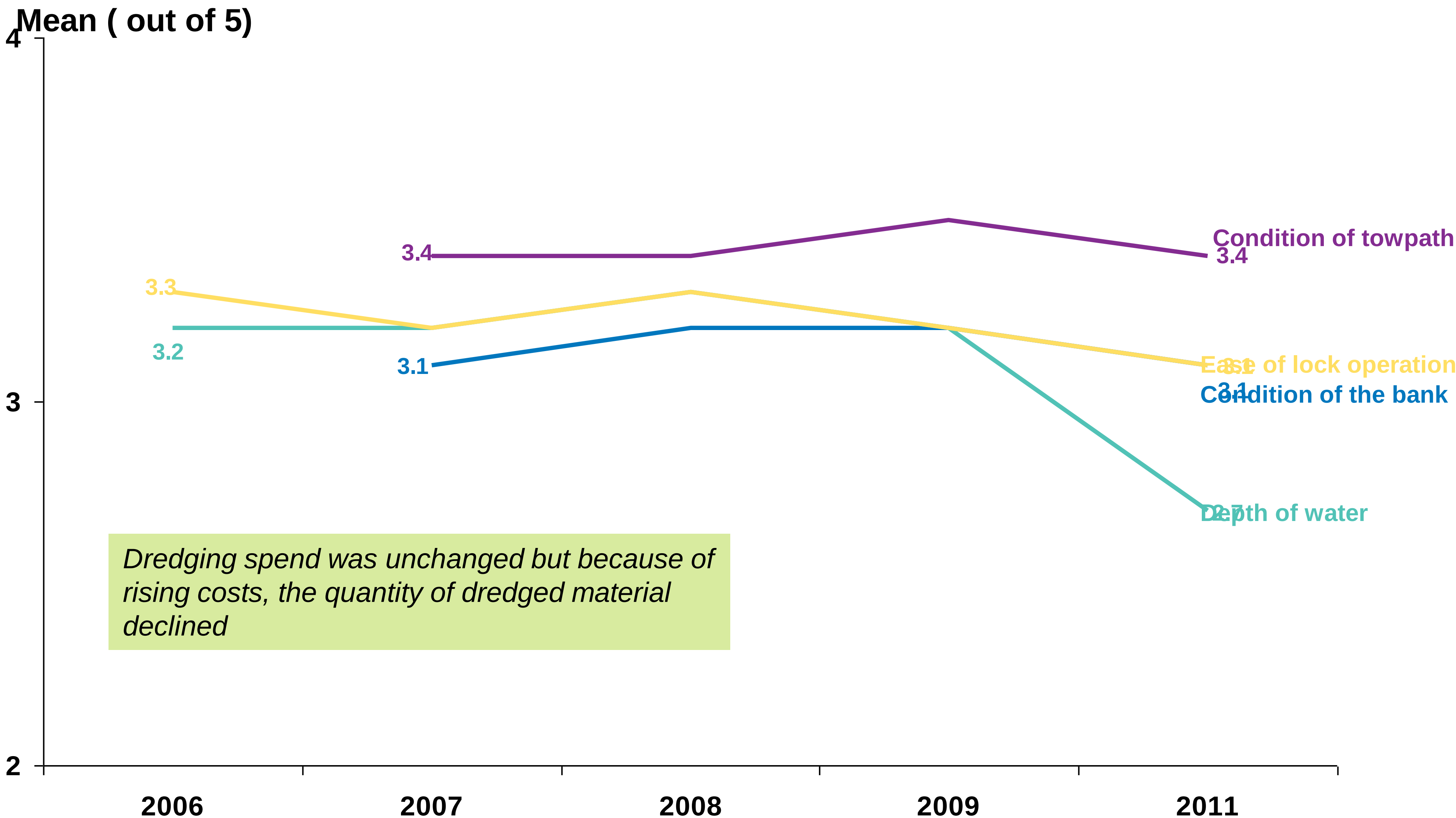
Upkeep trends: depth of water



Base: All
Source: 2009 (Q5a), 2011 (Q6)

General upkeep: by region (2011)

Mean (out of 5)	Clearance of rubbish, litter & weed	Condition of towpath	Condition of the bank	Depth of water	Ease of lock operation	Facilities provision
All (3588)	**2.85**	**3.40**	**3.06**	**2.73**	**3.13**	**3.05**
Continuous Cruiser (436)	***2.66***	***3.27***	***2.97***	***2.58***	***3.04***	***2.74***
North West (243)	2.47	3.24	2.95	2.88	2.91	2.90
North East (195)	2.62	3.44	3.12	3.07	3.03	2.85
Manchester & Pennine (153)	2.84	3.10	2.70	2.50	3.10	2.86
Wales and Borders (282)	3.20	3.46	3.14	3.06	3.29	3.25
West Midlands (188)	2.99	3.48	3.20	2.77	3.26	3.22
Central Shires (429)	2.95	3.39	3.01	2.73	3.09	3.09
East Midlands (208)	2.55	3.60	3.37	2.93	3.17	3.20
South Wales & Severn (201)	3.01	3.51	3.17	2.78	3.35	3.21
South East (829)	3.05	3.40	3.05	2.57	3.23	3.19
Kennet & Avon (191)	2.84	3.44	2.93	2.52	2.73	2.92
London (208)	2.45	3.59	3.16	2.80	3.16	2.88

Low score   High score

Water shortages in 2011, particularly SE and K&A exacerbated depth problems

Base: All
Source: 2011 (Q6)

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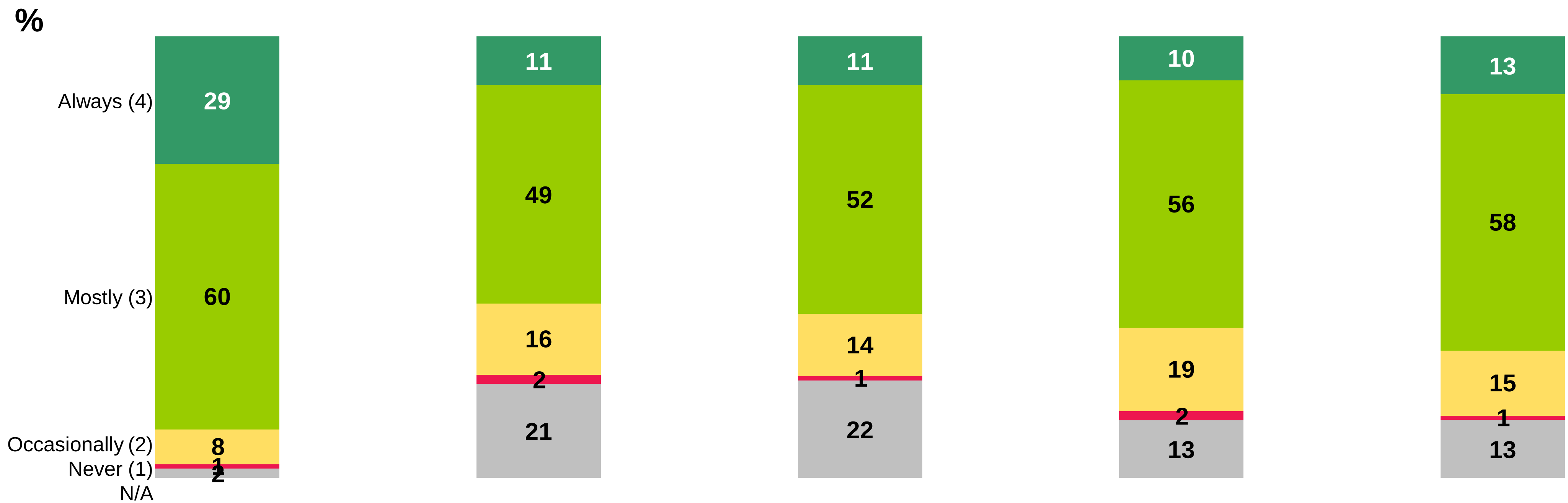
Provision of sanitation services

Water points and sanitary stations are clearly identified	Toilets, showers and washing facilities are clean	Toilets, showers and washing facilities are serviceable	Pump outs and elsan disposal facilities are clean	Pump outs and elsan facilities are serviceable



MEAN (2011):	**3.2**	**2.9**	**2.9**	**2.8**	**2.9**
MEAN (2009):	***3.2***	***3.0***	***3.1***	***2.9***	***3.0***

Base: All
Source: 2011 (Q8)

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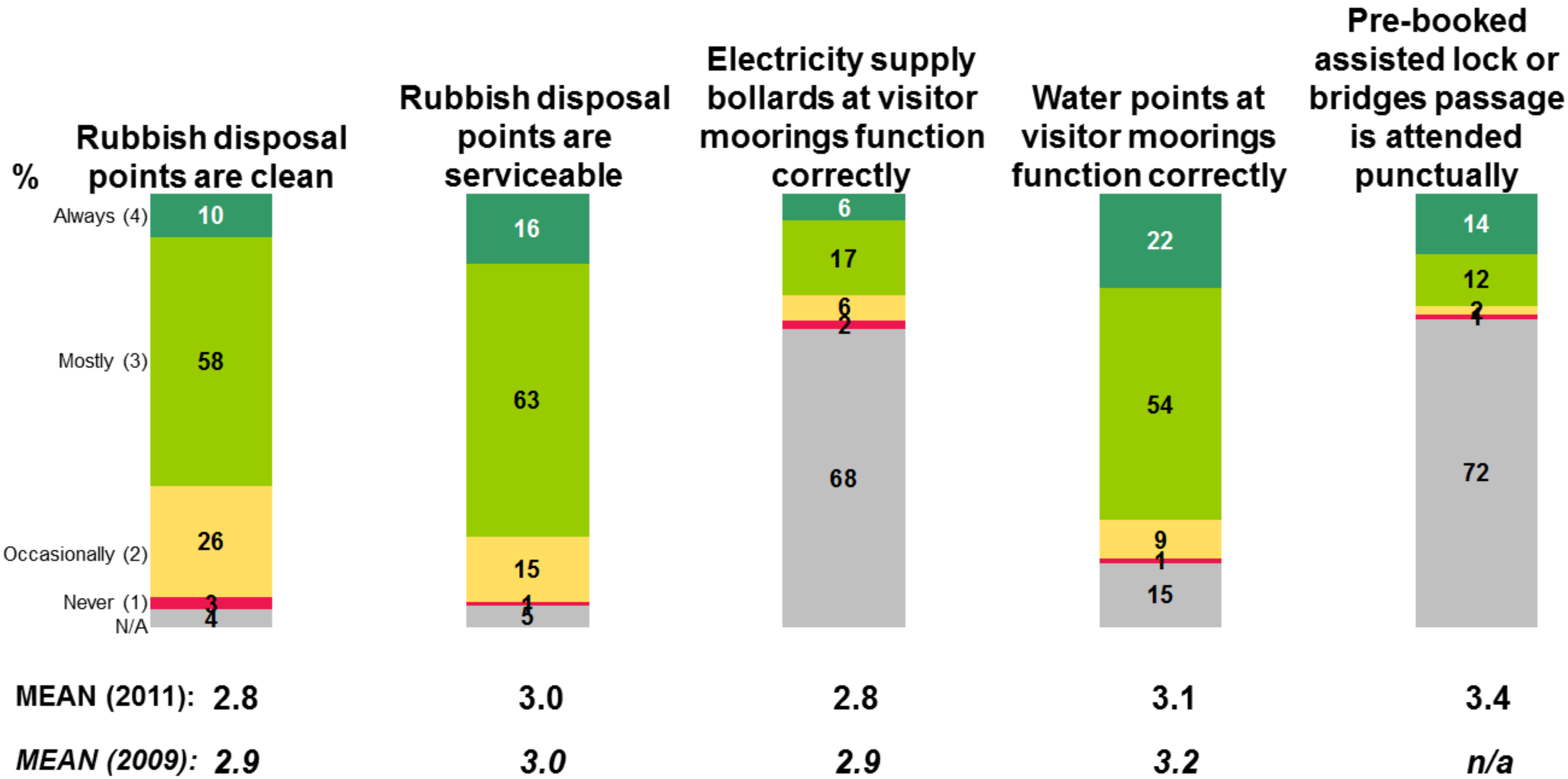
Provision of other services



Base: All
Source: 2011 (Q8)

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Customer Service

Including licence renewal

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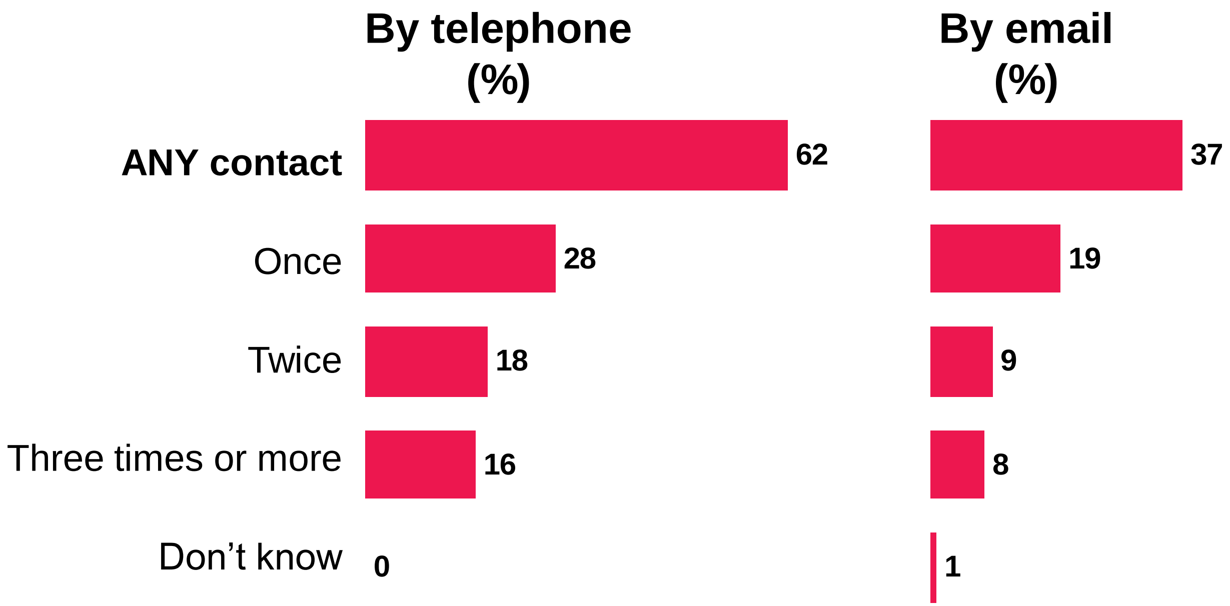
Q: How many times have you contacted our customer service team during the past year?



Base: All
Source: 2011 (Q10)

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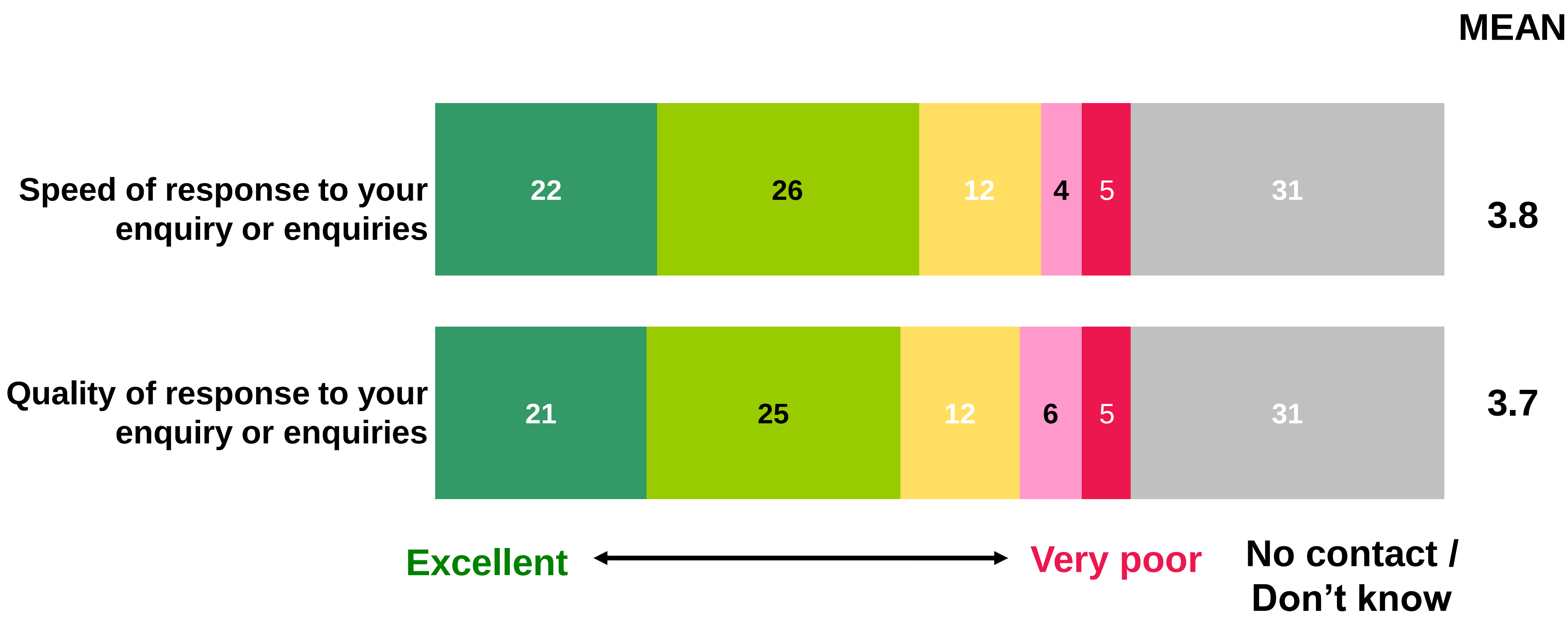
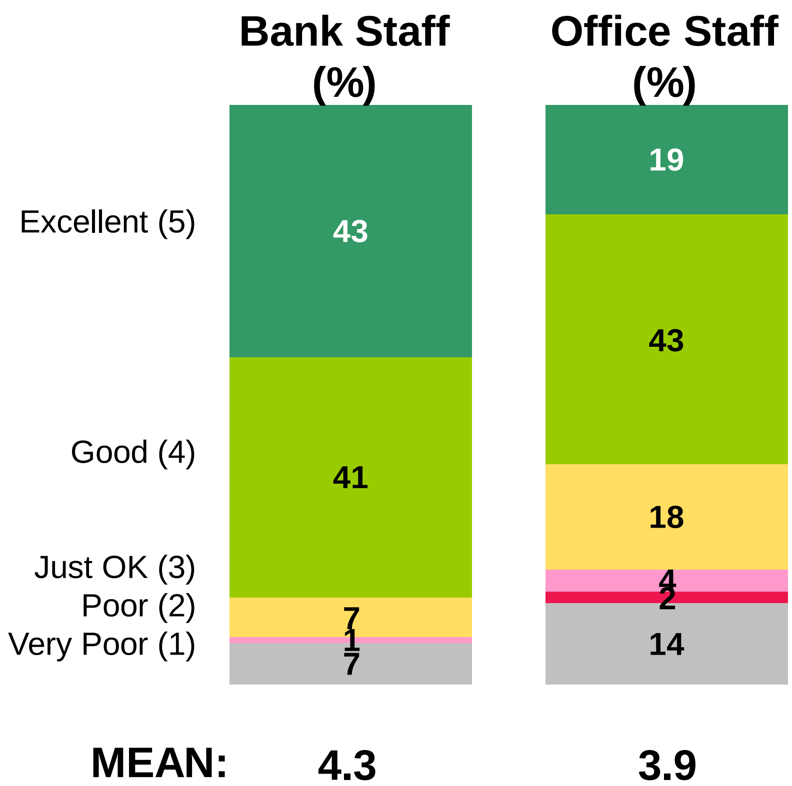
File location/File Name (including version)/Author Initials/Support Initials/Date

Q: If you contacted our customer service team, how do you rate the following?



Base: All
Source: 2011 (Q11)

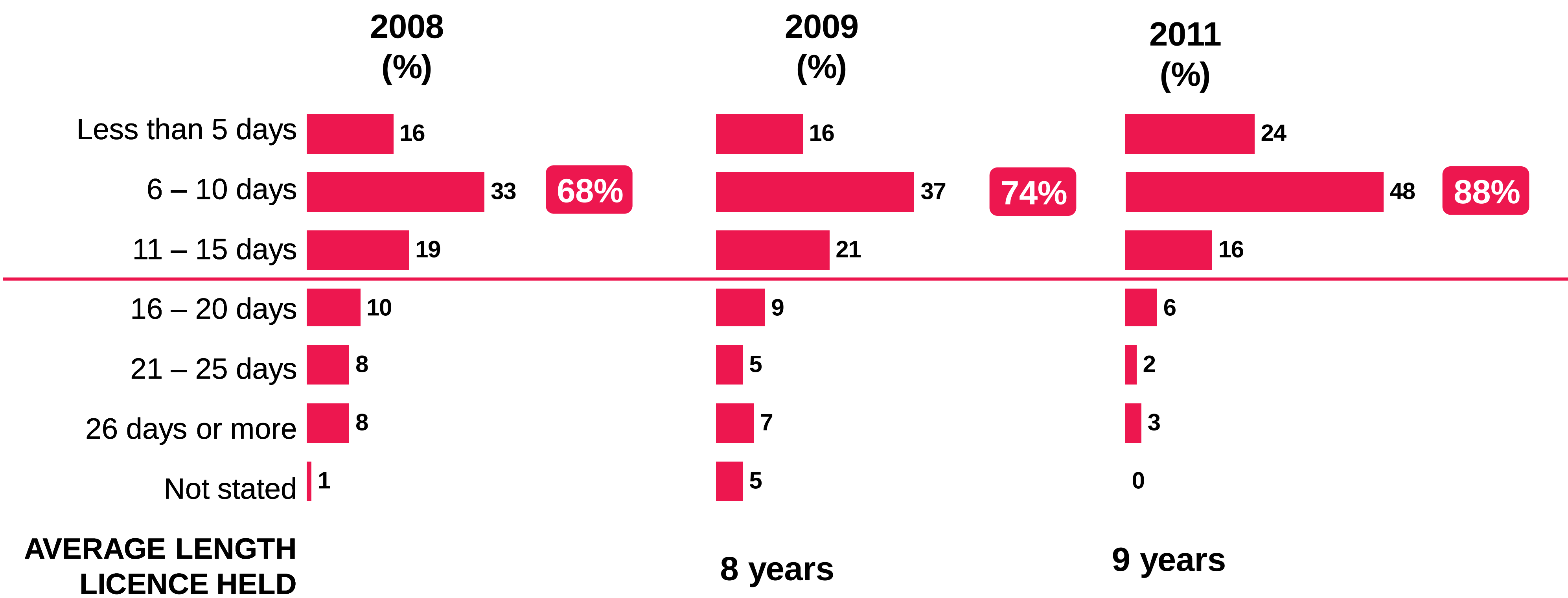
Q: How do you rate BW people?



Base: All
Source: 2011 (Q9)

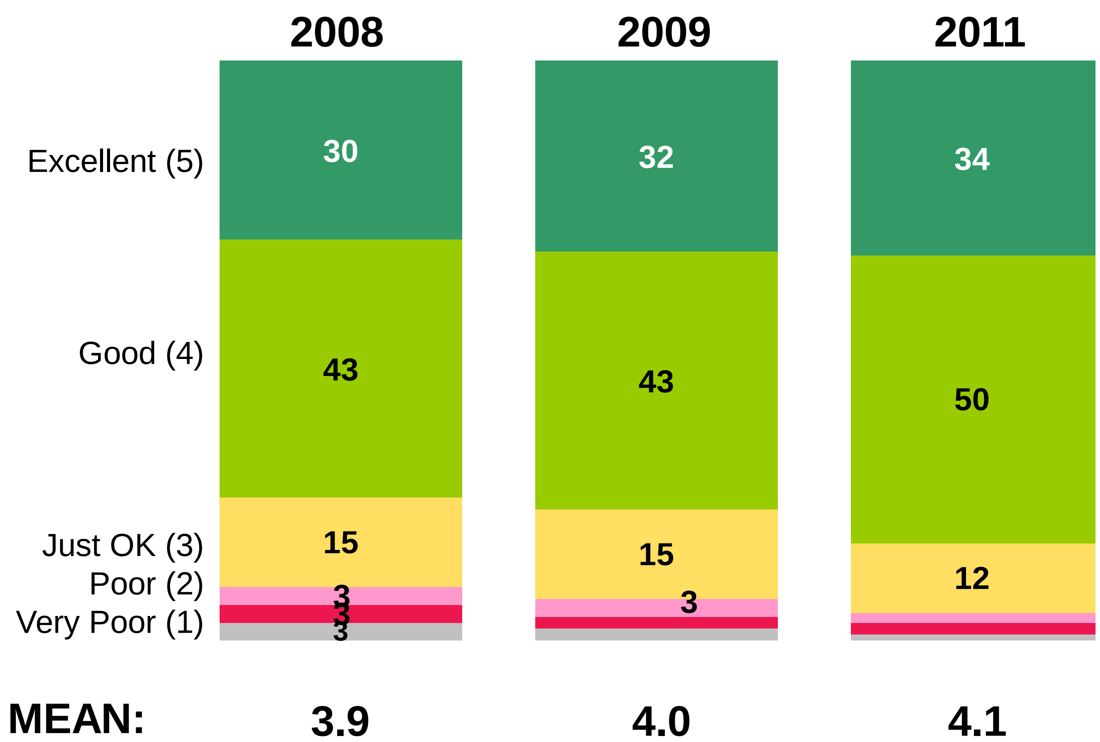
Q: How long did it take for you to receive your licence from submitting your application/renewal?

Our target is 15 days



Base: All
Source: 2009 (Q15, Q30), 2011 (Q12, Q48)

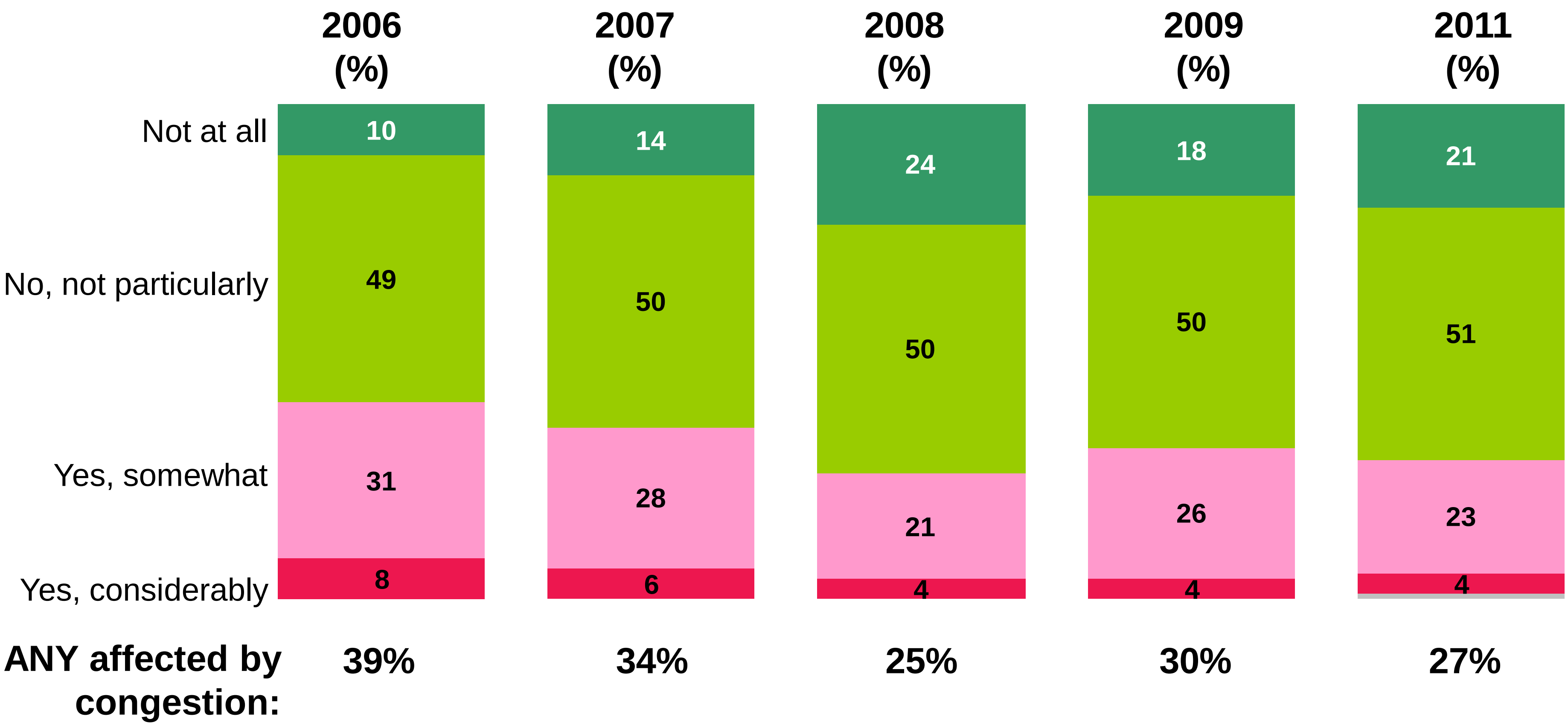
Q: Overall, how do you rate the following aspects of our boat licensing administration? **Overall service received**



Base: All
Source: 2009 (Q16), 2011 (Q13)

Congestion

Q: Thinking back over the last year, were you affected by congestion on the waterways?



The questionnaire did not attempt any definition of 'congestion' – the findings are therefore a summation of individuals' subjective views.

Base: All
Source: 2009 (Q46), 2011 (Q34)

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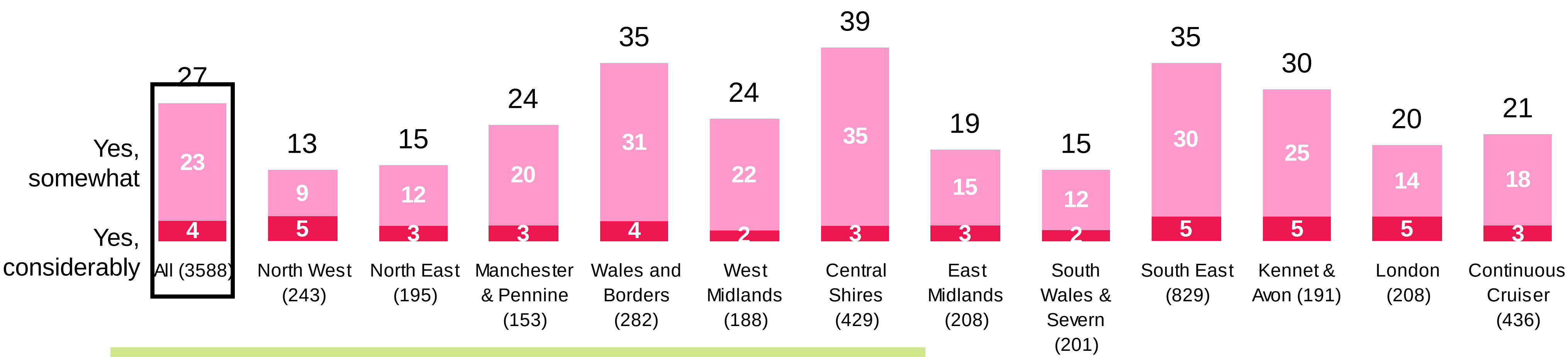
Congestion perceptions by waterway

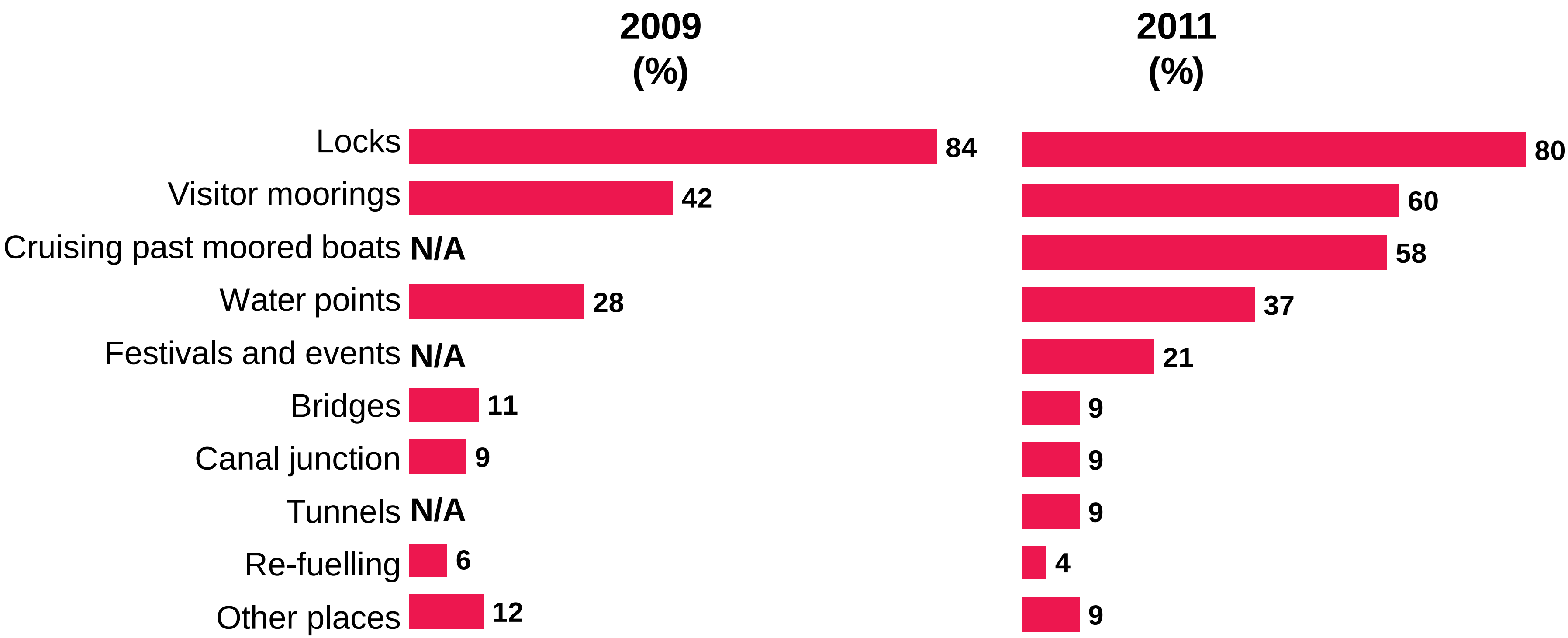
Thinking back over the last year, were you affected by congestion on the waterways? *(Yes, considerably, Yes, somewhat, No, not particularly, No, not at all, Don't know)*



Unsurprisingly, those areas most prone to congestion reports are the ones with largest concentrations of boats (Central Shires, Wales + Borders, South East) . There is no evidence that this influences satisfaction scores for different waterways

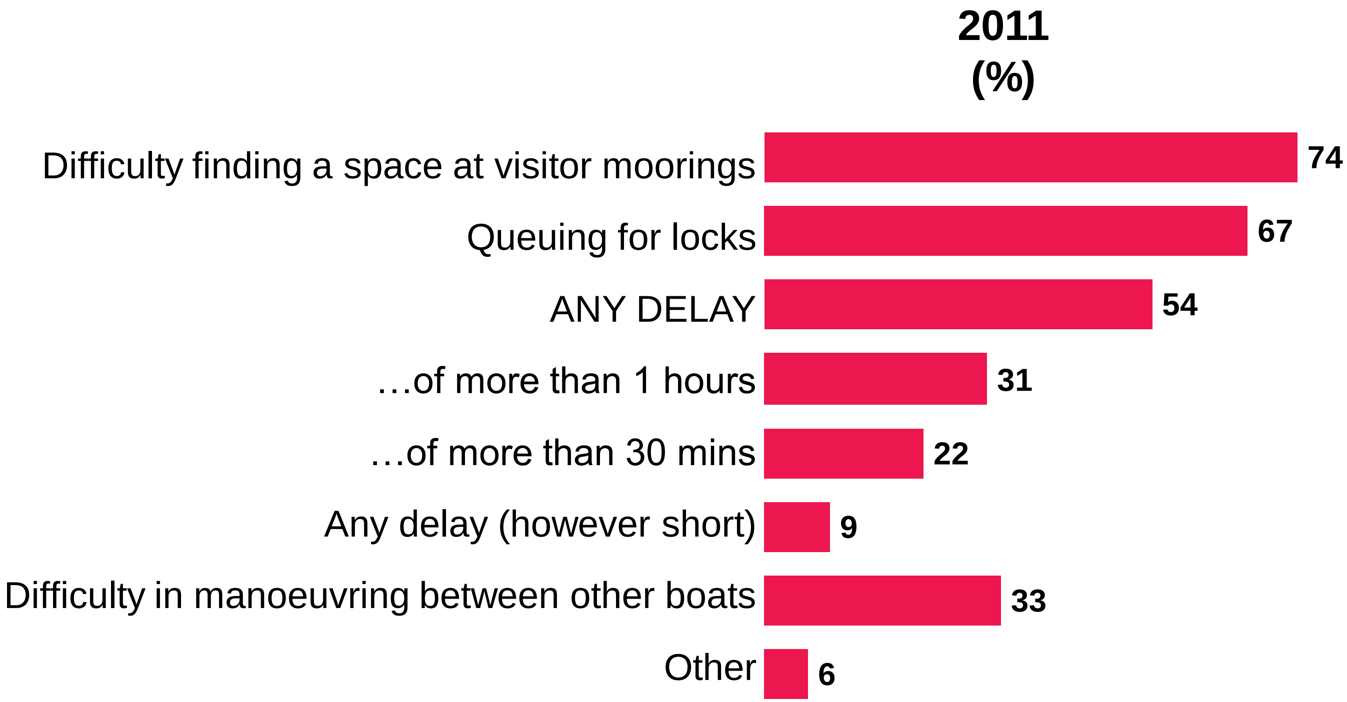
Base: All
Source: 2011 (Q34)

Q: Where do you find congestion on the waterways usually affects you?



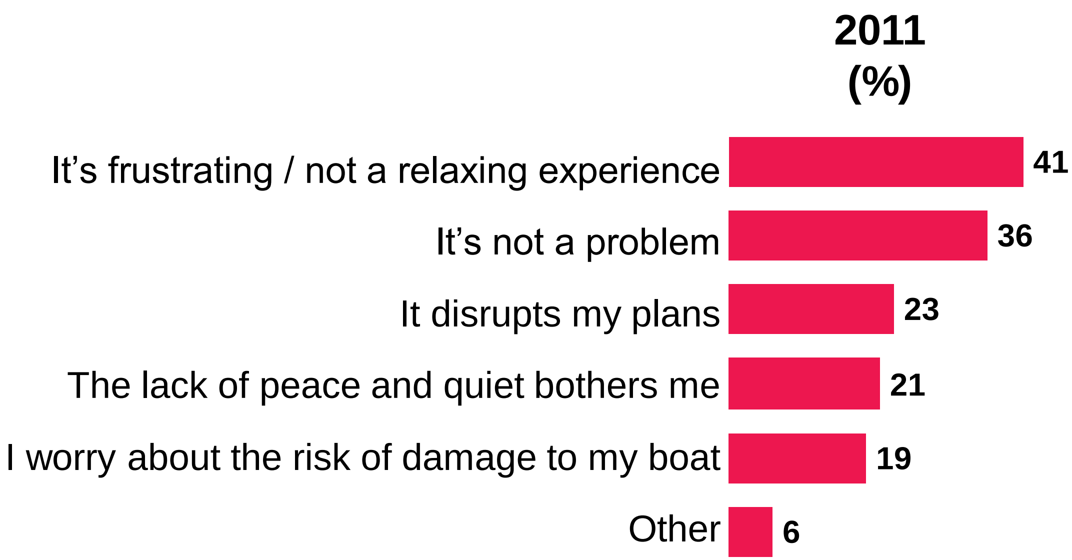
Base: All affected by congestion 2009 (688), 2012 (966)
Source: 2009 (Q48), 2011 (Q35)

Q: What does congestion mean to you?



Base: All
Source: 2011 (Q36)

Q: Which of the following statements best reflects how you feel about congestion?



Base: All
Source: 2011 (Q37)

Q: Is the number of boats moored along the waterways in your selected area...

Is the number of boats moored along the waterways in your selected area... *Too many, About right, Too few*

	Too many	About right	Too few
All (3588)	**25**	**70**	**4**
Continuous Cruiser (436)	***14***	***75***	***9***
North West (243)	17	78	5
North East (195)	9	79	12
Manchester & Pennine (153)	22	72	6
Wales and Borders (282)	33	66	1
West Midlands (188)	15	80	4
Central Shires (429)	27	71	2
East Midlands (208)	15	78	6
South Wales & Severn (201)	14	83	3
South East (829)	38	60	1
Kennet & Avon (191)	37	58	5
London (208)	31	64	5

Base: All
Source: 2011 (Q38)

Mooring

Home Moorings

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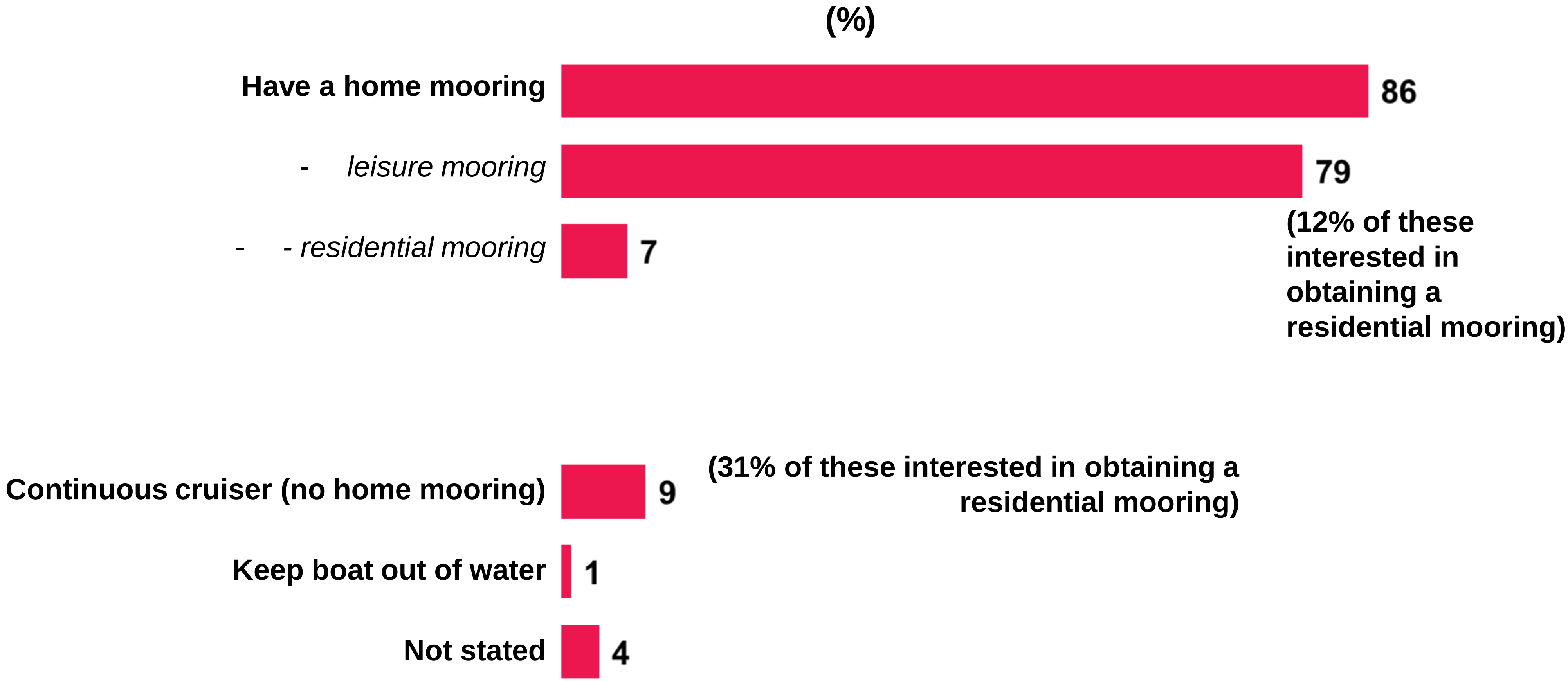
Do you have a home mooring for your boat?



Base: All
Source: 2011

Q: Using the scale below, how do you rate the QUALITY of your home mooring?

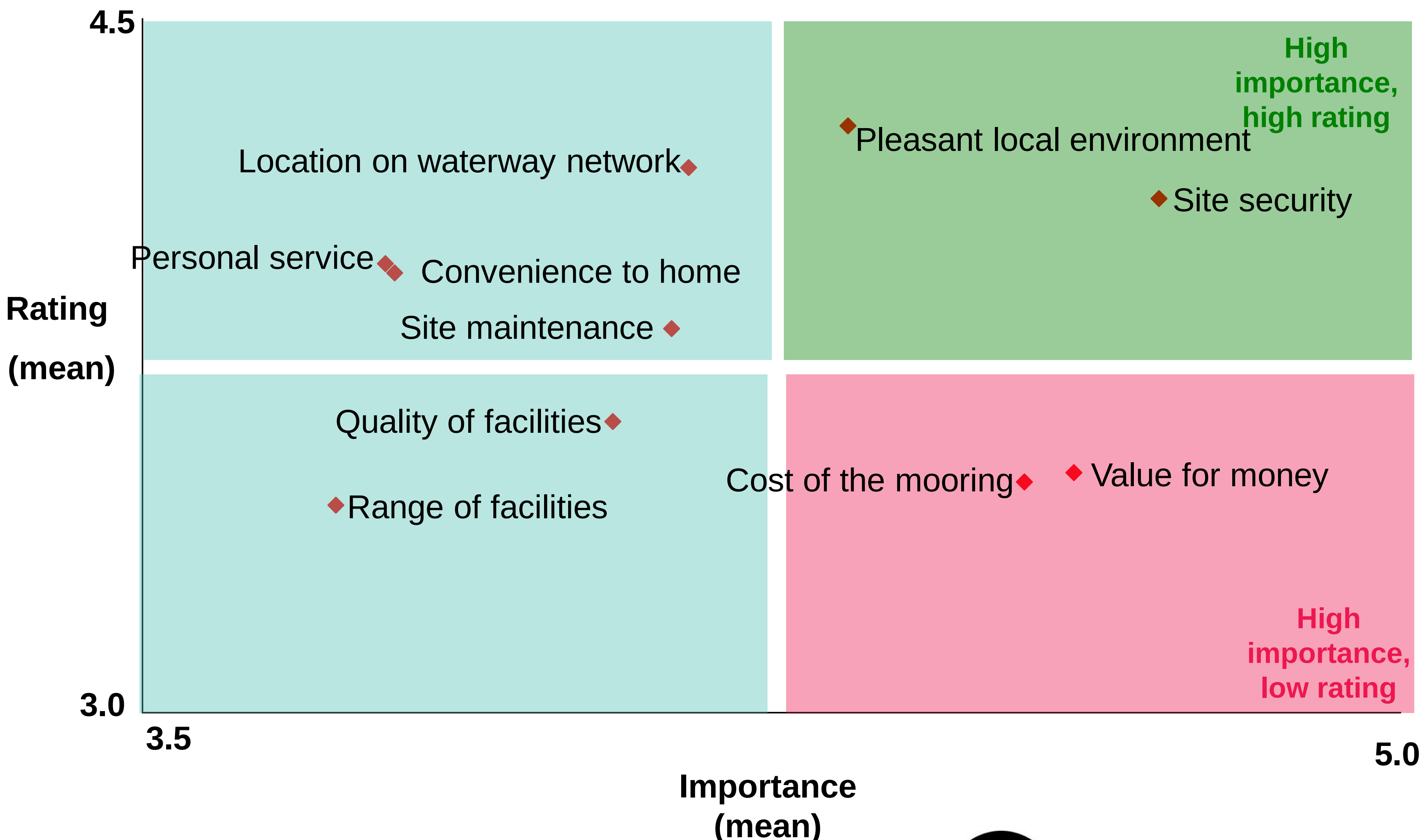
Question is answered by anyone with a home mooring –results include but don't relate only to Canal & River Trust directly managed sites.

Mean (out of 5)	Trend	
	2009	2011
Site security	3.95	4.11
Cost of the mooring	3.30	3.50
Convenience to home	3.85	3.95
Site maintenance	3.89	3.83
Has consent for residential use	3.83	3.62
Quality of facilities	3.58	3.63
Range of facilities	3.40	3.45
Pleasant local environment	4.19	4.27
Personal service	4.00	3.97
Location on waterway network	4.11	4.18
Value for money	3.43	3.52

Improvements in the majority of categories highlighted green. Small changes not statistically significant.

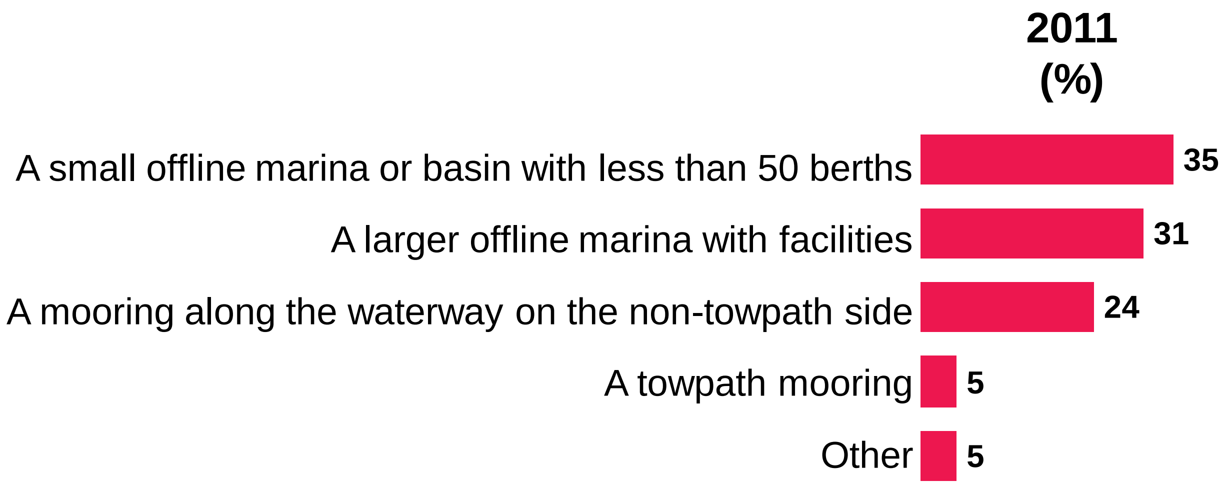
Base: All with home mooring
Source: 2011 (Q20)

Home mooring: Importance vs. ratings (2011)



Base: All with home mooring
Source: 2011 (Q19 / Q20)

Q: If you could choose any type of mooring, which would you prefer?



Base: All
Source: 2011 (Q18)

Membership of waterway organisations and prospective support for Canal & River Trust

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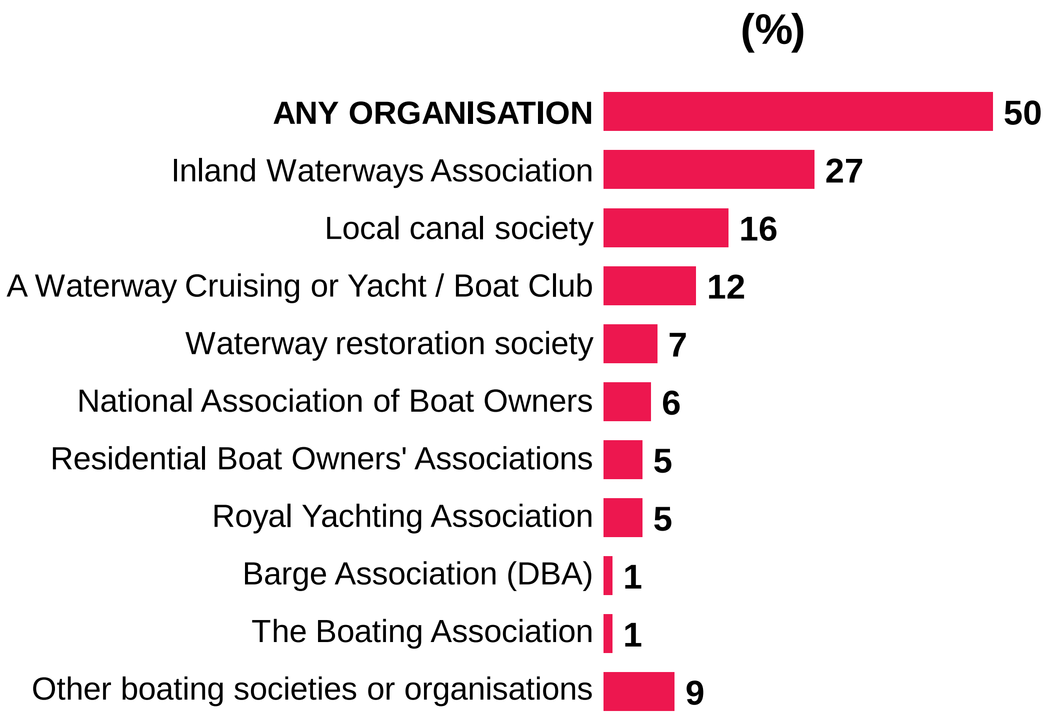
Membership of organisations (2011)



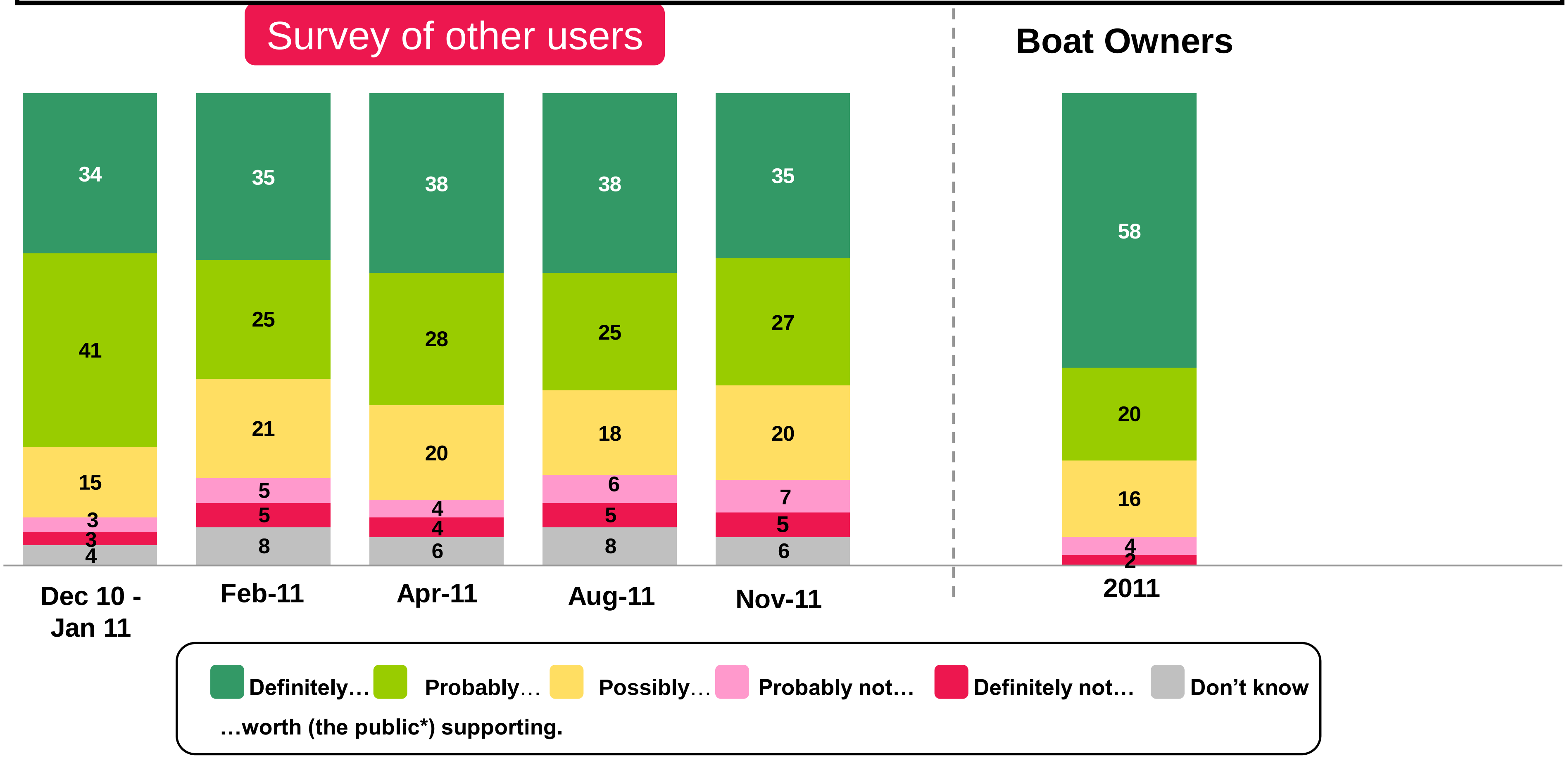
	Approx. estimated total boater membership*
ANY ORGANISATION	**16,000**
Inland Waterways Association	9,000
Local canal society	5,000
A Waterway Cruising or Yacht / Boat Club	4,000
Waterway restoration society	2,000
National Association of Boat Owners	2,000
Residential Boat Owners' Associations	2,000
Royal Yachting Association	2,000
Barge Association (DBA)	<500
The Boating Association	<500
Other boating societies or organisations	3,000

* Derived by multiplying survey %s by 32,000 private boat licence holders

Base: All
Source: 2011 (Q56)

Boaters’ alignment with Canal & River Trust cause

Question posed:
This summer a new charity called the Canal & River Trust will be created to protect and promote the country’s waterways and to ensure that our unique waterway heritage will always be a valued part of local landscapes and communities. ***Do you think this cause is… worth supporting?****



*Note that the question wording was slightly different between the 2 surveys
Base: All England and Wales Residents (IWVS), All Boat Owners
Source: 2011 (Q50)

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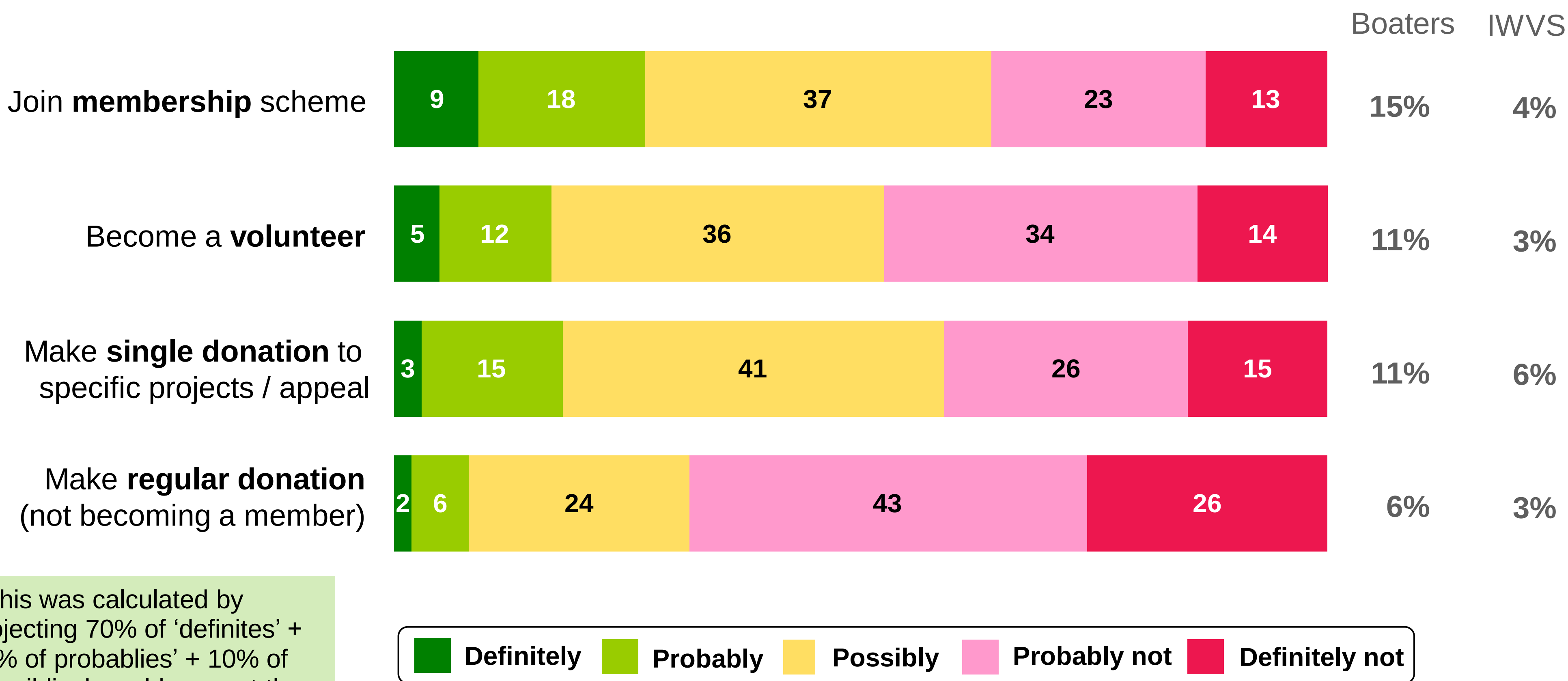
Likelihood of boaters supporting the Trust

The new charity will manage canals and rivers in England and Wales. This means that the public will be able to provide support to help care for the waterways. How likely would you be to support this charity in each of the following ways…?

Projected conversion rates*



* This was calculated by projecting 70% of 'definites' + 30% of probablies' + 10% of 'possiblies' would support the Trust as indicated

Base: All
Source: 2011 (Q51)

Canal & River Trust

bdrc continental

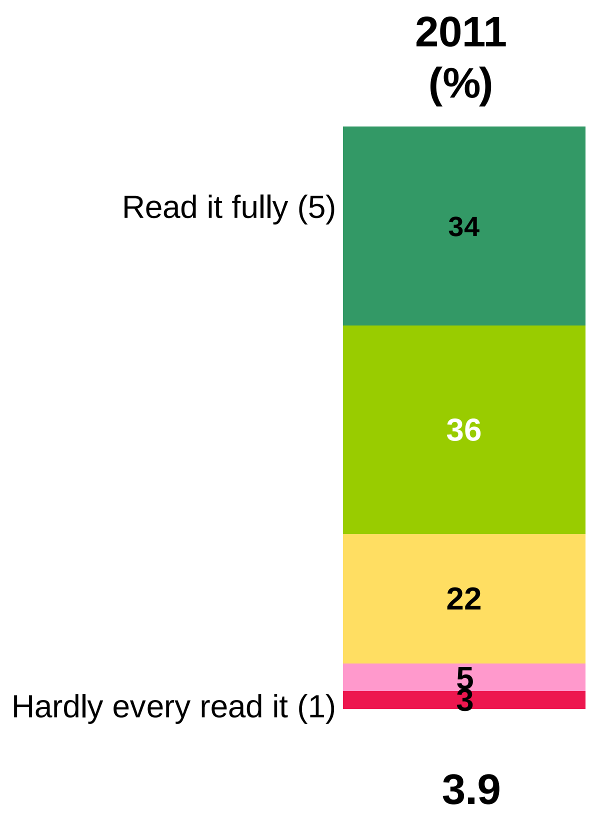
Boaters Updates readership

Canal & River Trust
Keeping people, nature & history connected

bdrc continental

Boaters’ Updates (2011)

47% overall subscribe to Boaters’ Updates



Base: All / All who subscribe to Boaters’ Updates
Source: 2011 (Q58, Q59)