Canal & River Trust
Making life better by water

2021 Annual Boater Satisfaction Survey

April 2021

Contents

The report covers all measures and goes into specific regional differences

Executive Summary

Executive Summary: Methodology

- Research was conducted in-house by the Insight & Evidence Team based on a questionnaire devised by the Boating Team.
- Analysis was conducted in house and with professional statistical support.
- Survey was administered using an online questionnaire covering:
    - User experience and satisfaction
    - Trust experience and reputational and service measures
    - For 2021 a significant portion of the survey explored boating sustainability; specifically the Governments 'Clean Maritime Plan'[1]
- The survey was distributed to random sample of approximately a third of all licence holders.
- Those for whom the Trust held an email address were sent a link to the online survey through a personal email. The emails included a unique URL for each respondent.
- Boaters for whom the Trust doesn't hold an email address were sent a link to the survey either through a:
    - Text message including link to online survey, if the Trust held a mobile number
    - Letter including link to online survey but with paper version of the survey

The survey was open from 27th February 2021 to 4th March 2021

A total of 1179 responses were obtained.

(similar to 2020, which achieved 960.)

[1] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/815664/clean-maritime-plan.pdf

Executive Summary: Key Findings

- The main finding in the 2021 Annual Boater's survey was the fall in the Overall Satisfaction KPI from 60%* in 2020 to 54% in 2021.
  - Whilst this is unwelcome news, many boaters remain very happy and engaged with the Trust.

- The reduction of the overall satisfaction KPI is part of a significant long-term trend of falling overall satisfaction and a trend of rising dissatisfaction.

*A value of 67% was recorded at the time based upon monthly data as the annual survey for 2020 was not completed in time for KPI reporting

Executive Summary: What effect did COVID-19 have?

- Covid-19 was explicitly mentioned in 10% of comments (99 out of slightly over 1000 comments)
- There is an acknowledgement that everyone has been placed in difficult positions and many comments extend an empathy to the Trust.
- The comments in general relate to the principal issues that are annoying the boaters:
  - Upkeep and maintenance
  - What they see as funds not used correctly
  - A focus on the wrong things: not boaters and far too much on cyclists and walkers
- Where Covid is mentioned, it is invariably in the context:
  1. Of these very issues (e.g.: paid licence, could not boat but upkeep still poor and everyone else could use facilities/cyclists, walkers)
  2. To suggest that the Trust is doing a good job in spite of the lockdown problems.
- Comment: Not so much in *this* survey, but closer to the time (i.e.: in monthly surveys), there was more annoyance that the public could meander freely near peoples boats during lockdown: this seems to fuel the 'Trust doesn't care' narrative'.

CRT are obviously struggling with a spate of issues and closures on top of the problems of COVID and Brexit. My biggest concern however is the inconsistency in the organisation…..There does seem to be an overarching lack of knowledge of boating and canals among many of the staff, although there are shining examples of staff who are genuinely enthusiastic about our canals and boating, many others are purely clerical/management clones.

CRT is currently doing a good job under the circumstances, providing good communication during the Covid crisis. We have been unable to visit our boat for many months, but this is due to Government regulations, however the site owner provides an update on the boats at our moorings

With annual price rises, poor maintenance of the waterways and limited use of the canals & rivers due to COVID-19 I would have hoped for further help similar to those we received in the first lockdown!

I have the upmost respect for CRT. Not much cruising of late for me but I have high hopes for the future. It strikes me that from my cruising that CRT have a monumental task in servicing our canal network. They are doing an outstanding job. I'm also aware of the financial restraints they must be under before but even more so now as a result of COVID. How many Narrowboat owners just renew their annual CRT license as a matter of course and how many have gone to 6 as opposed to 12 months.

Hi. After a year when I have not been able to use my boat due to the prevailing Covid conditions. I feel the trust has done a lot to keep boaters informed and updated and have kept us leisure boaters up to date on present restrictions.

Accepting the current Covid19 difficulties I feel that there has been a significant increase in stoppages affecting navigation than under your predecessor. Whether this is a result of lack of planned preventative maintenance / a 'policy' of rushing to closure rather than allowing navigation with restriction / or just bad luck is difficult to say. As an organisation you seem to be friendly and welcoming but I don't have much direct contact with you. Volunteers generally are warm and engaging.

Executive Summary

- Whilst this report concentrates on specialised quantitative and statistical analysis, it is worth also considering the verbatim comments*. These reveal exactly the same themes:
  1. Dissatisfaction with upkeep and maintenance
  2. Behind the very negative attitudinal findings are the reasons:
     - The way in which the Trust is seen to use its income and resources:
     - Too much emphasis on branding, sale of property, and what is seen as a prioritisation of pedestrians and cyclists in the context of perceiving themselves to be paying customers.
     - Too little focus on boating, navigation, upkeep, dredging and the clearance of vegetation.

*Analysed by the Boating Team in greater detail

Canal & River Trust

Executive Summary

- One very interesting finding is that the interactions with volunteers can significantly positively influence satisfaction.
- This may be a counterpoint to a criticism seen in the verbatim comments that we overly rely on volunteers; volunteers really care and they are a visible demonstration that we are being efficient and cost effective.
- Regional Effects:
  - Many differences were noted between the regions but often these are not statistically significant. However, with reasonable sized samples there appears to be consistently something different with regards to ratings on a range of measures.
    - West Midlands and Wales & South West: Consistently rated relatively higher
    - North East & Yorkshire and North West: Consistently rated relatively lower
  - *NB: Region as a contributory factor did not emerge as a driving force behind KPI differences, but further work is needed to understand regional differences fully and with statistical confidence.*

Executive Summary: Sustainability

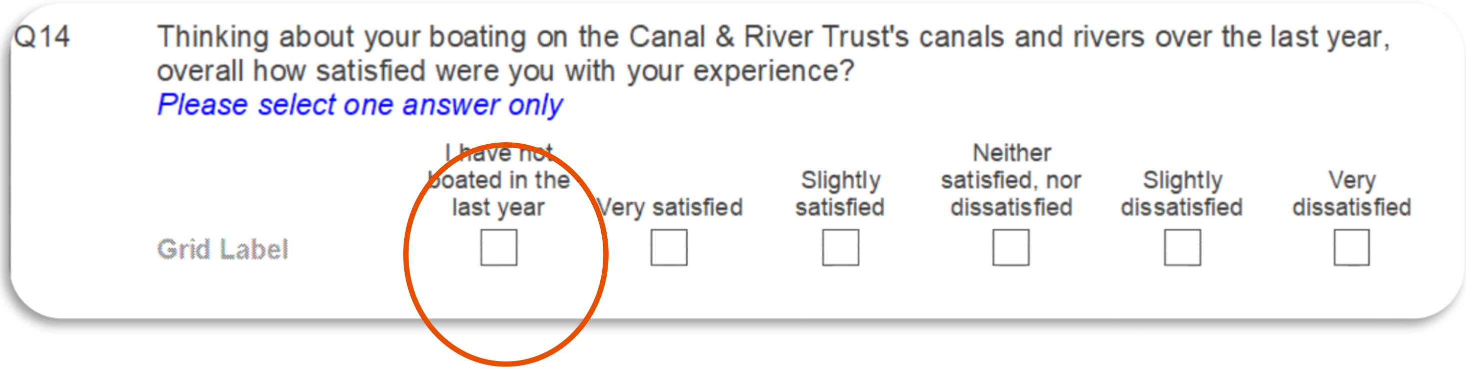
- This year's annual survey contained a lot of material about the Government's 'Clean Maritime Plan' and in particular, boaters views about measures that could reduce overall emissions.
- The findings show that whilst many boaters are supportive in principle, few are very aware of all the facts and options.
- Instead, a concern about costs dominates discussion of both barriers to change and aligns to potential incentives: such as grants and other schemes.

Overall Satisfaction KPI

2

2021 Overall Satisfaction KPI

- ***It is vital to note that the question asked for 2021 differs to those previously asked in that it has an additional option that can be selected:***



Q14 Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience?
Please select one answer only

	I have not boated in the last year	Very satisfied	Slightly satisfied	Neither satisfied, nor dissatisfied	Slightly dissatisfied	Very dissatisfied
Grid Label	☐	☐	☐	☐	☐	☐

- Because a sizeable number of boaters selected the option “I have not boated in the last year”, they effectively did not give an input to the question, nor were arguably fair comparators even if they had answered (as they hadn’t boated!).
- For this reason the KPI is calculated by the sum % who responded to “very satisfied” and “slightly satisfied” EXCLUDING all those who selected “I have not boated in the last year” from the base for calculation.
- Note: A similar addition to the questionnaire is made at Q2 where respondents are asked about the region in which they boated. They could also opt to say they had not boated here. However, many of those very same ‘non-boaters’ did go on to answer Q14. Consequently, the Insight Manager decided the fairest, cleanest and most robust thing to do was to exclude based on Q14 only.
- NB: In practice the difference between the two methods results in:
    - Exclude at q14 only: KPI is 54%
    - Exclude at q2 KPI is 54.6%
    - Don’t exclude at all, the KPI is 45%

Overall satisfaction 2021 v 2020 KPI

- 17% said they had not boated in 2021.
- Excluding these, the net satisfaction value is 54%
- An appendix slide is included with a full comparison

- This is down on the 60% for 2020 and also the reported 67% End Of Year (2019-20) position reported

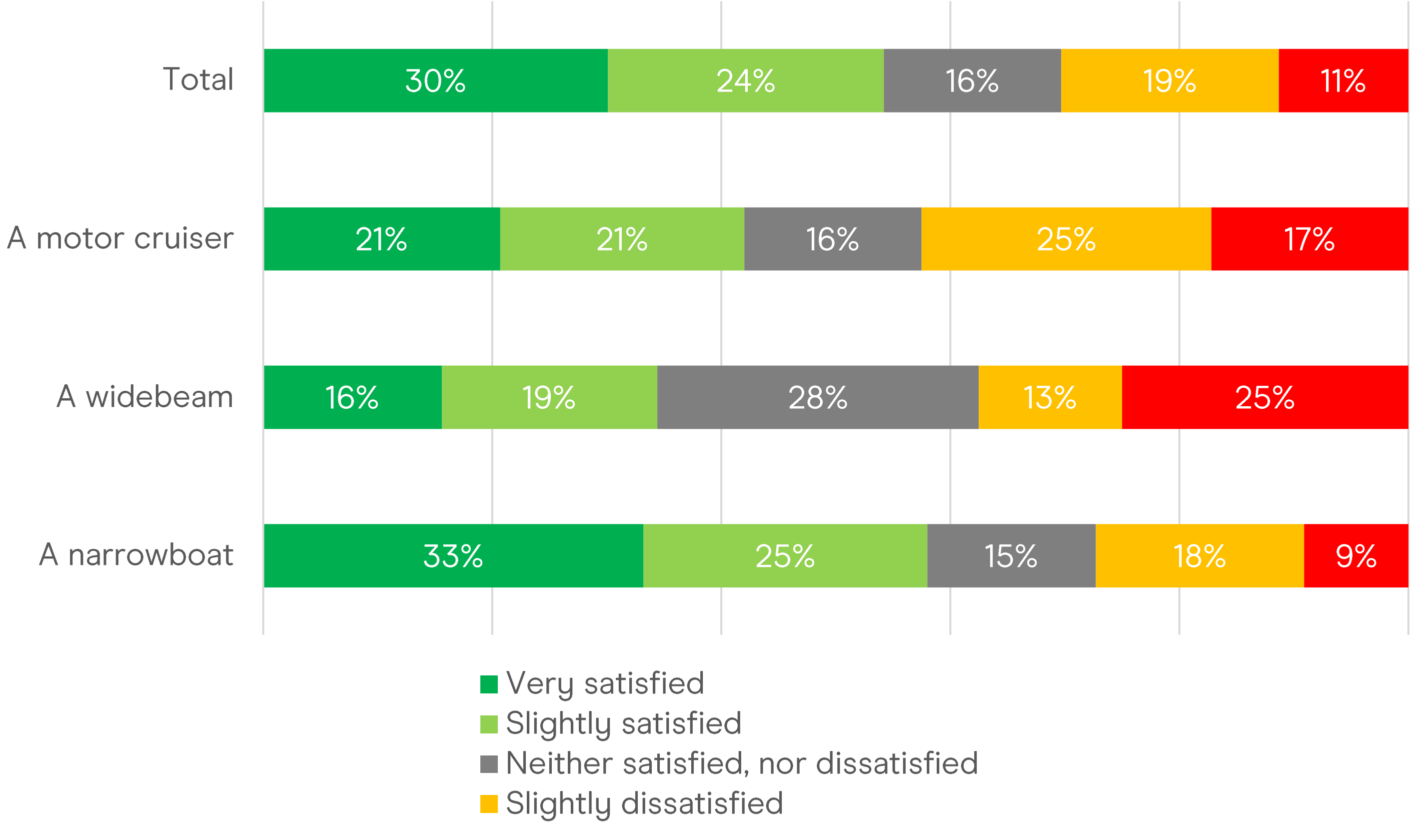
- Compared with 2020 the KPI is down significantly (Z test result p is .09492. Significant at $p < .10$)

2021
Satisfaction
KPI
54%
(very or slightly satisfied)

Q14a. Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience?
Please select one answer only

KPI: 2021 by Craft

Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience?
Please select one answer only



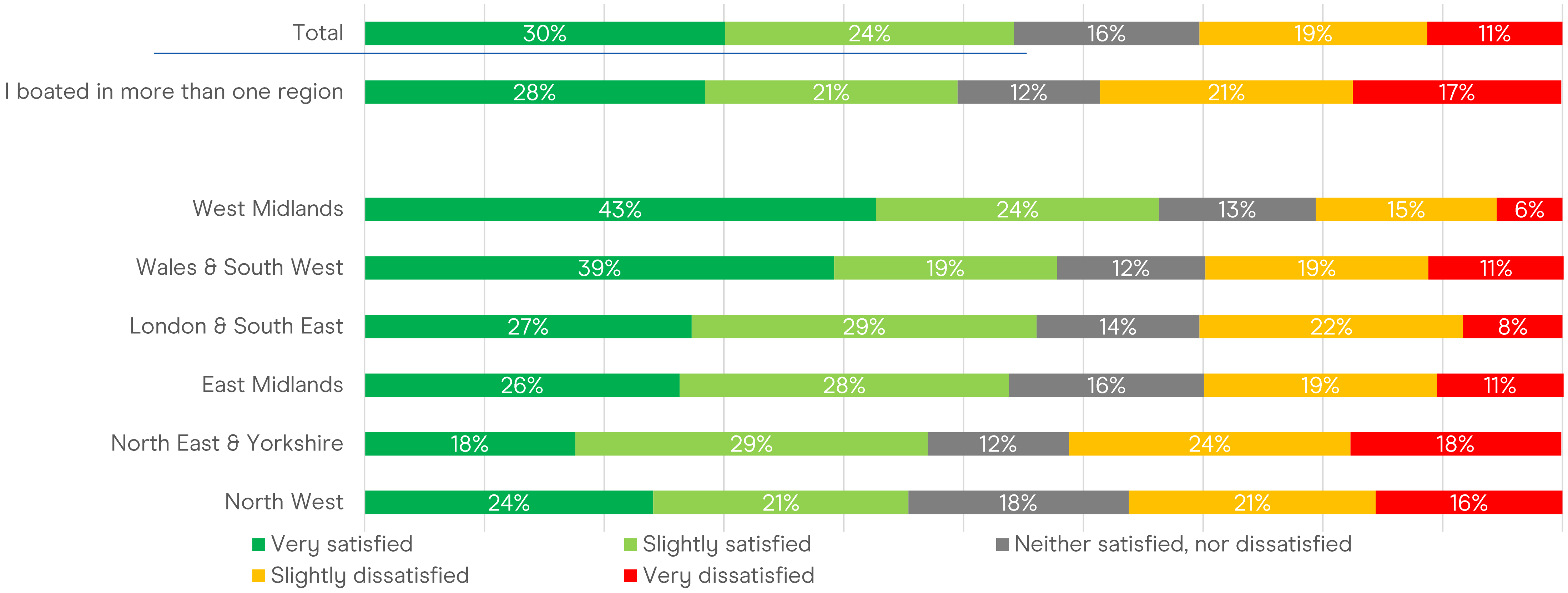
- The differences in satisfaction observed should be taken with a little caution due to large variations in base size. That said:
  - Wide beam boaters are the least satisfied (n=32)
  - Narrow boaters are the most satisfied.
- An interesting feature of the data is polarization – with narrowboats and motor cruisers exhibiting large numbers of respondents with positive and negative comments.

Sample: 2021 excludes those who answered “I have not boated in the last year”

Total	A narrowboat	A widebeam	A motor cruiser	Other
957	735	32	174	16

KPI: 2021 by Region

Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience?
Please select one answer only



Sample: 2021 excludes those who answered "I have not boated in the last year"

Total	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	North Wales	I boated in more than one region
957	28	141	85	160	97	199	132	6	109

KPI: 2021 by Boater Type

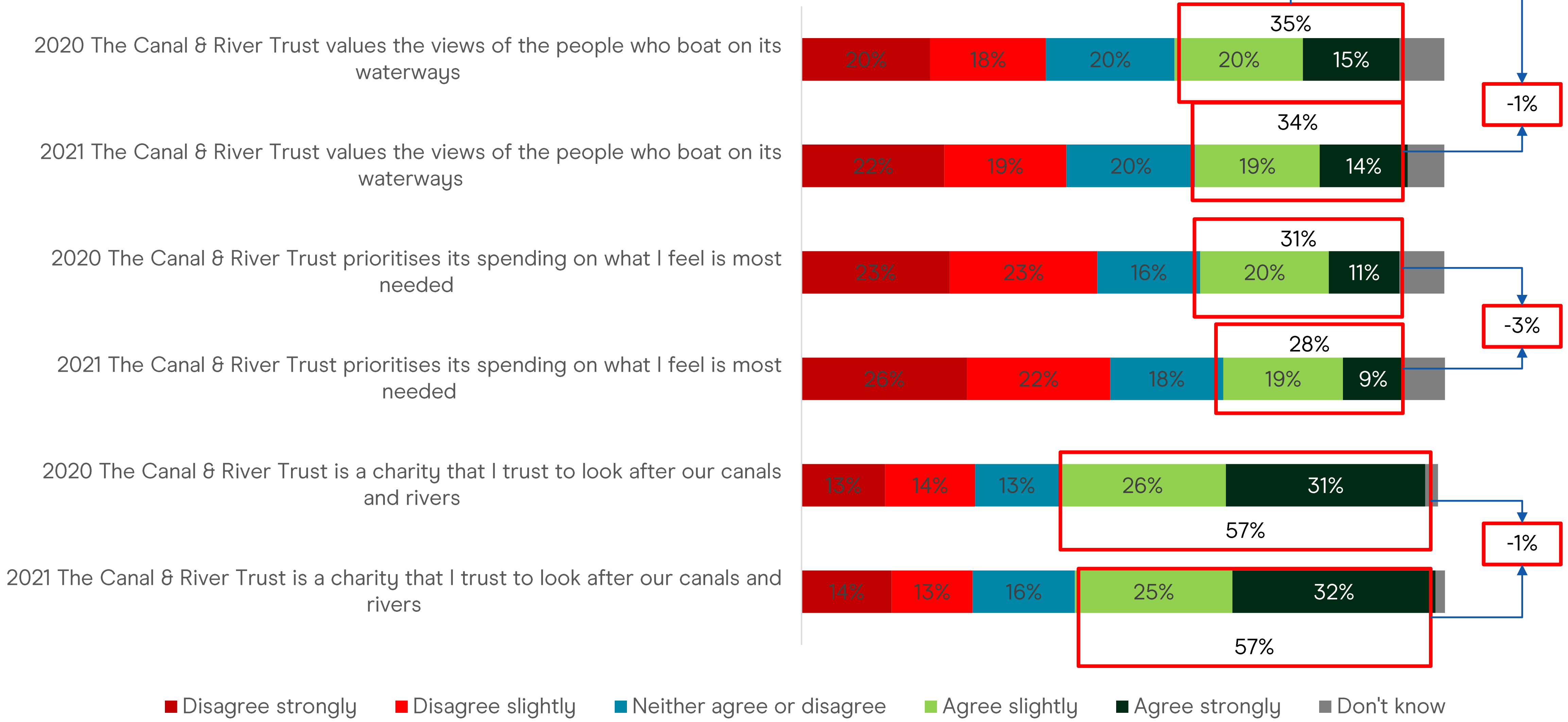
Q21: Thinking about your boating on the Canal & River Trust's canals and rivers over the last year, overall how satisfied were you with your experience?
Please select one answer only

Sample: 2021 excludes those who answered "I have not boated in the last year"

Total	A leisure boater who continuously cruises	A leisure boater who has a home mooring	A liveaboard boater who continuously cruises	A liveaboard boater who has a home mooring	A trade boater	Other
957	56	615	123	124	19	20

Secondary: Attitudes

Reductions in agreement and increases in disagreement between 2020 and 2021 in each of these key drivers

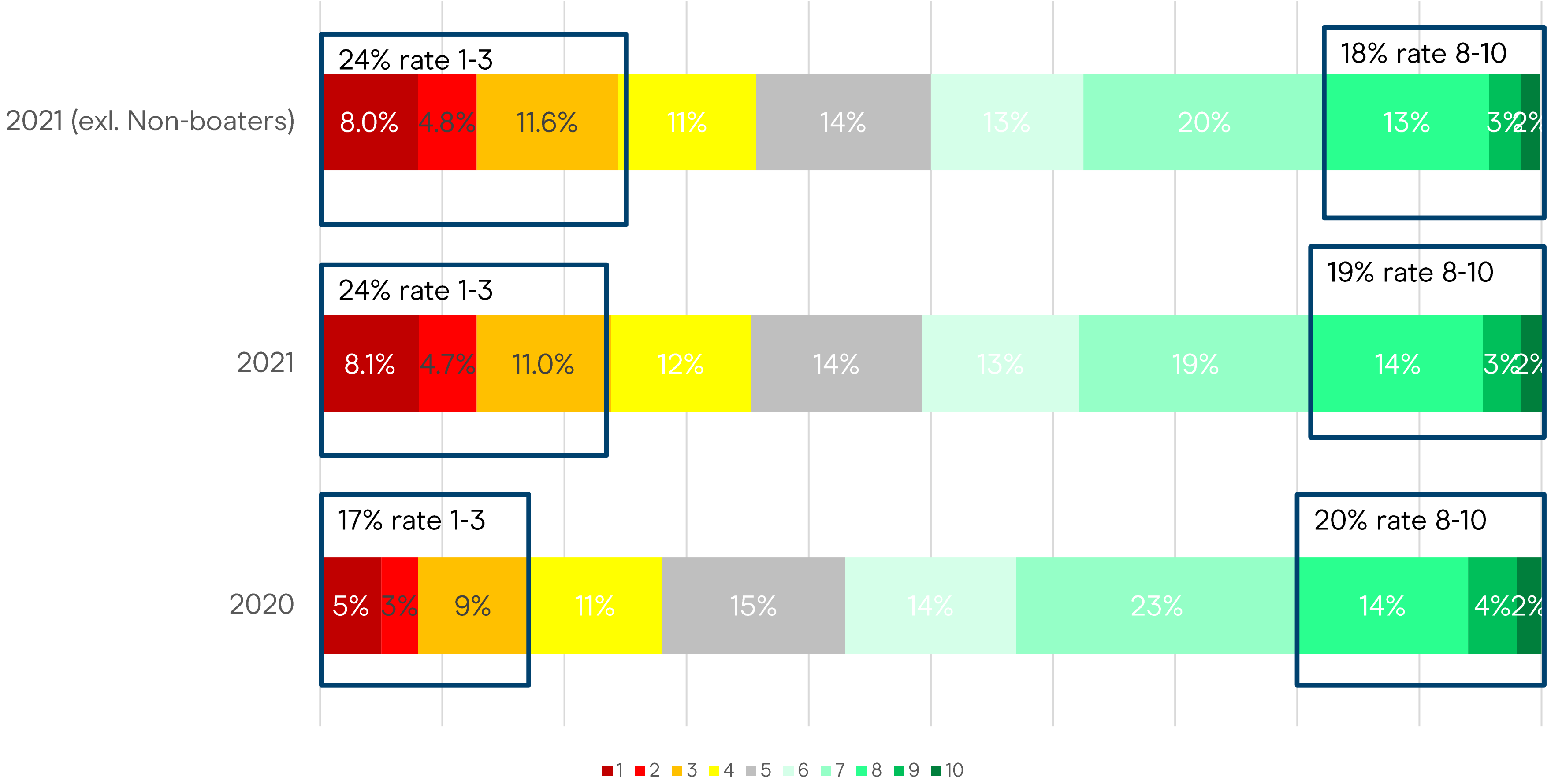


Maintenance

3

Upkeep 2021 v 2020

Q13: Please indicate how you would rate the overall upkeep of the Canal & River Trust's waterways
1=Very Poor, 10=Excellent

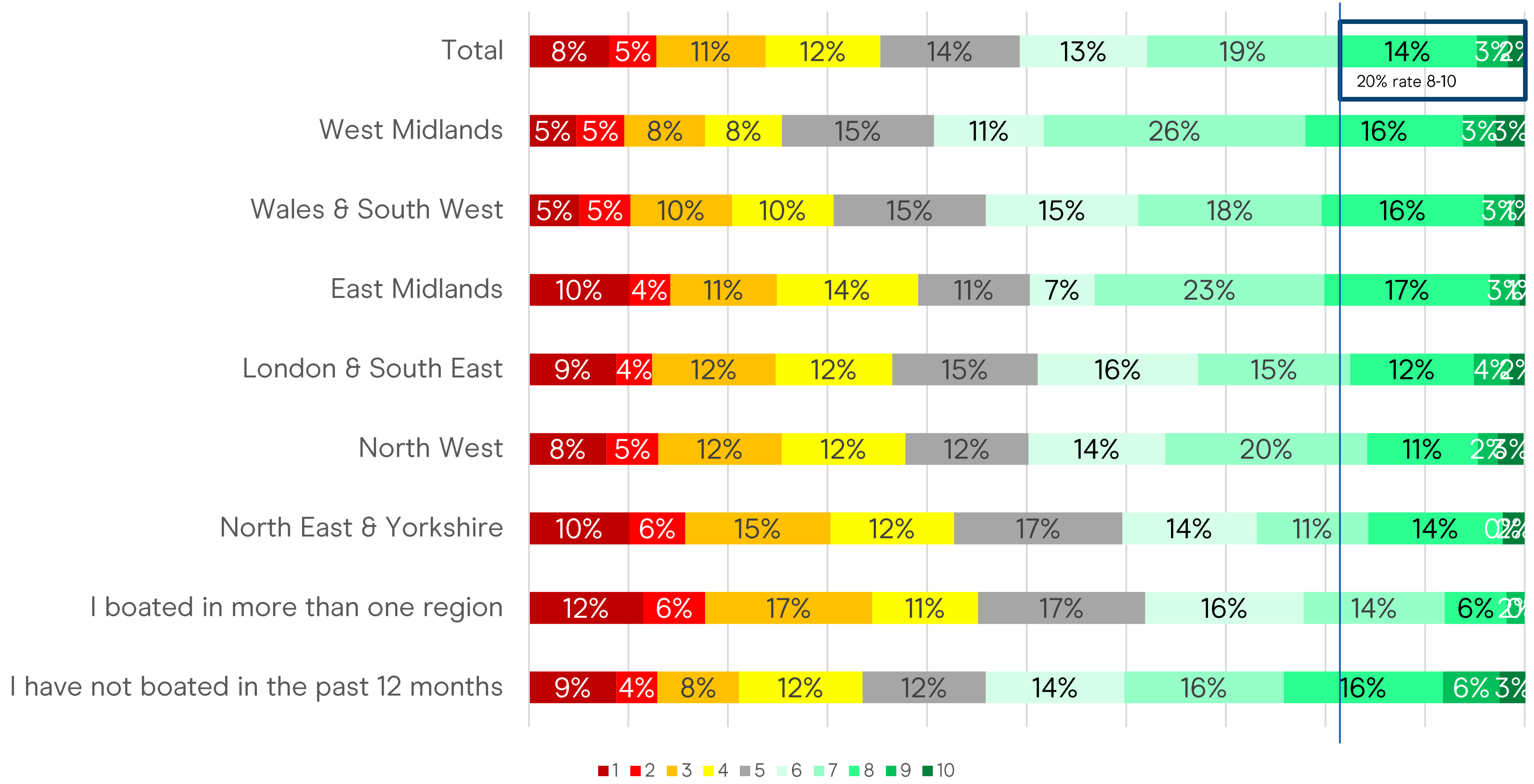


- A small negative change is seen in upkeep between 2020 and 2021.
- This is also worse when the sample removes those that said they didn't boat (i.e.: only contains those that experienced the waterways)
- A small change like this wouldn't usually be very important, but as later sections of the report will show – **upkeep is a key driver of satisfaction and thus very important in the influence of the KPI**.

Sample: 2021 n=1168, 2020 n=960, 2021 (excluding non-boaters from Q2) n=974

Upkeep 2021 by Region

Q13: Please indicate how you would rate the overall upkeep of the Canal & River Trust's waterways
1=Very Poor, 10=Excellent



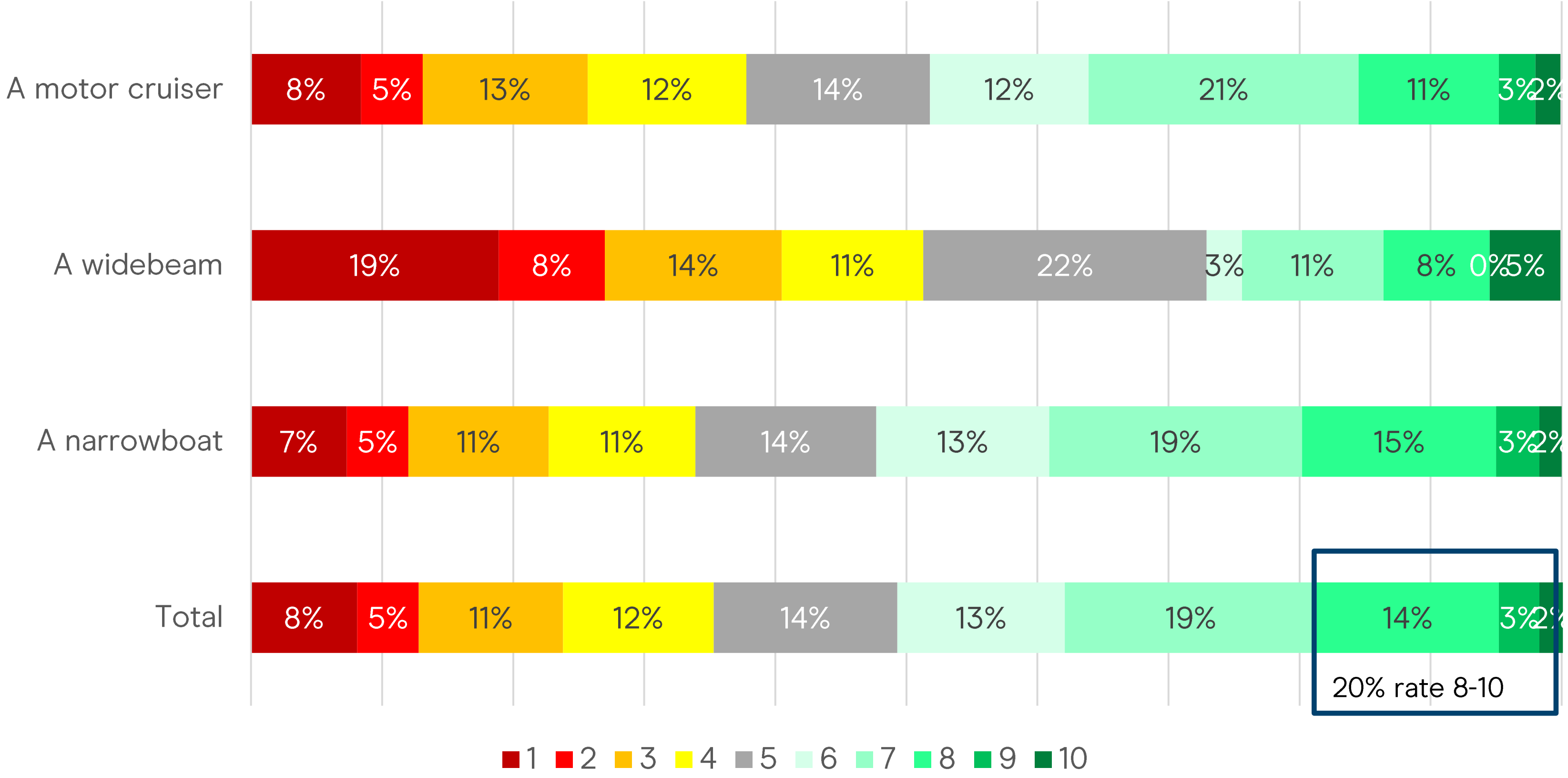
- Regional variations are seen. Compared to the overall sample of those scoring 8-10:
  - The West Midlands comes top
  - The North East and Yorkshire comes bottom
- *These differences are not significant statistically*
- Why these differences exist will require more detailed examination (and is done in the "KPI Section".
- It is interesting to note the scores given by those who have not boated – and thus presumably not in a position to gauge changes

Sample: 2021 n=1168,

Base	1168	194	153	89	169	98	209	137	113
	Total	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	I boated in more than one region

Upkeep 2021 by Craft

Q13: Please indicate how you would rate the overall upkeep of the Canal & River Trust's waterways
1=Very Poor, 10=Excellent



- Perceptions of upkeep vary considerably by the type of craft that the respondent has.
- The most standout aspect, backed up by the comments, is that Wide beam boaters see upkeep as a problem more so than other boaters

Sample: 2021 n=1168

Total	A narrowboat	A widebeam	A motor cruiser
1168	900	37	214

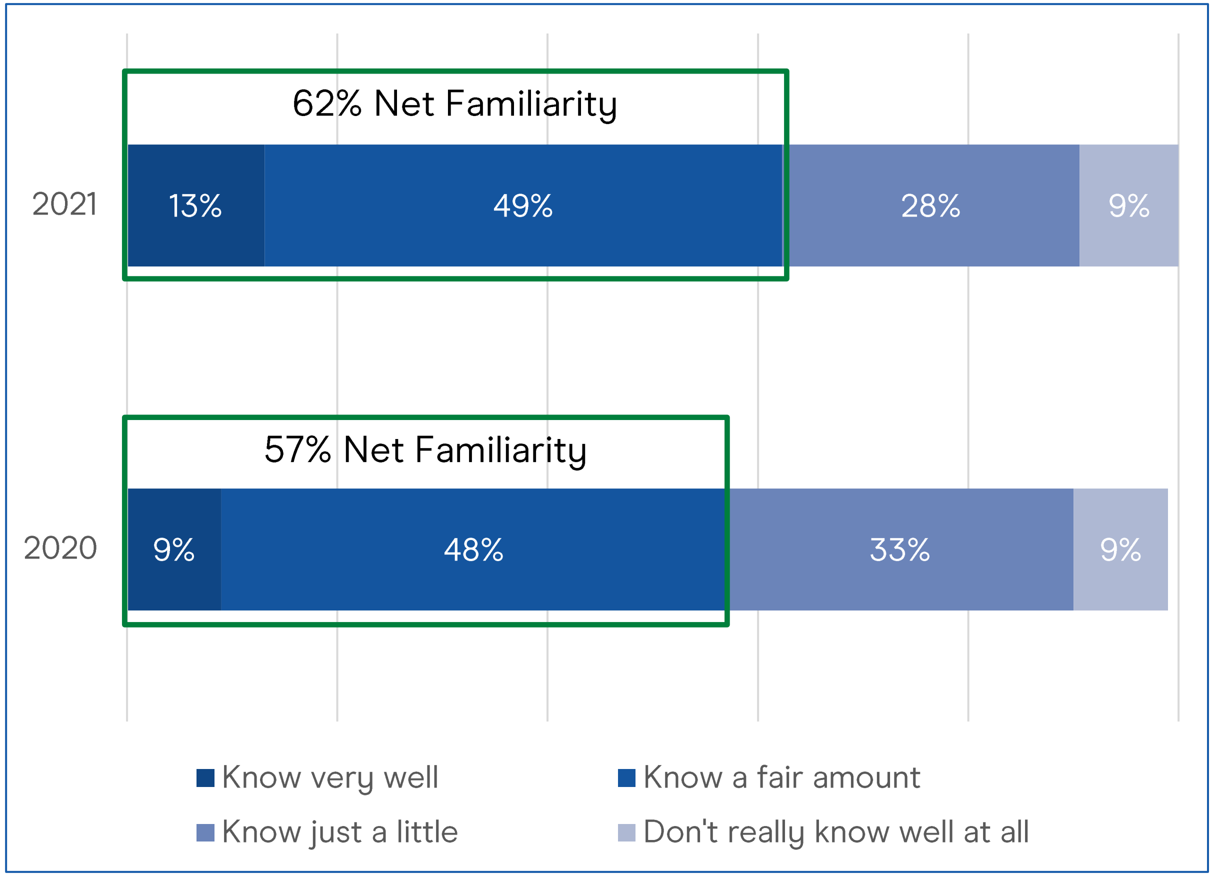
Relational Measures

4

Familiarity
Favourability
Advocacy
Word of Mouth
Recommendation of Waterways

Familiarity 2021 v 2020

Q8: How well do you feel you know the Canal & River Trust as an organisation i.e. the charity itself, not the waterways?
Please select one answer only

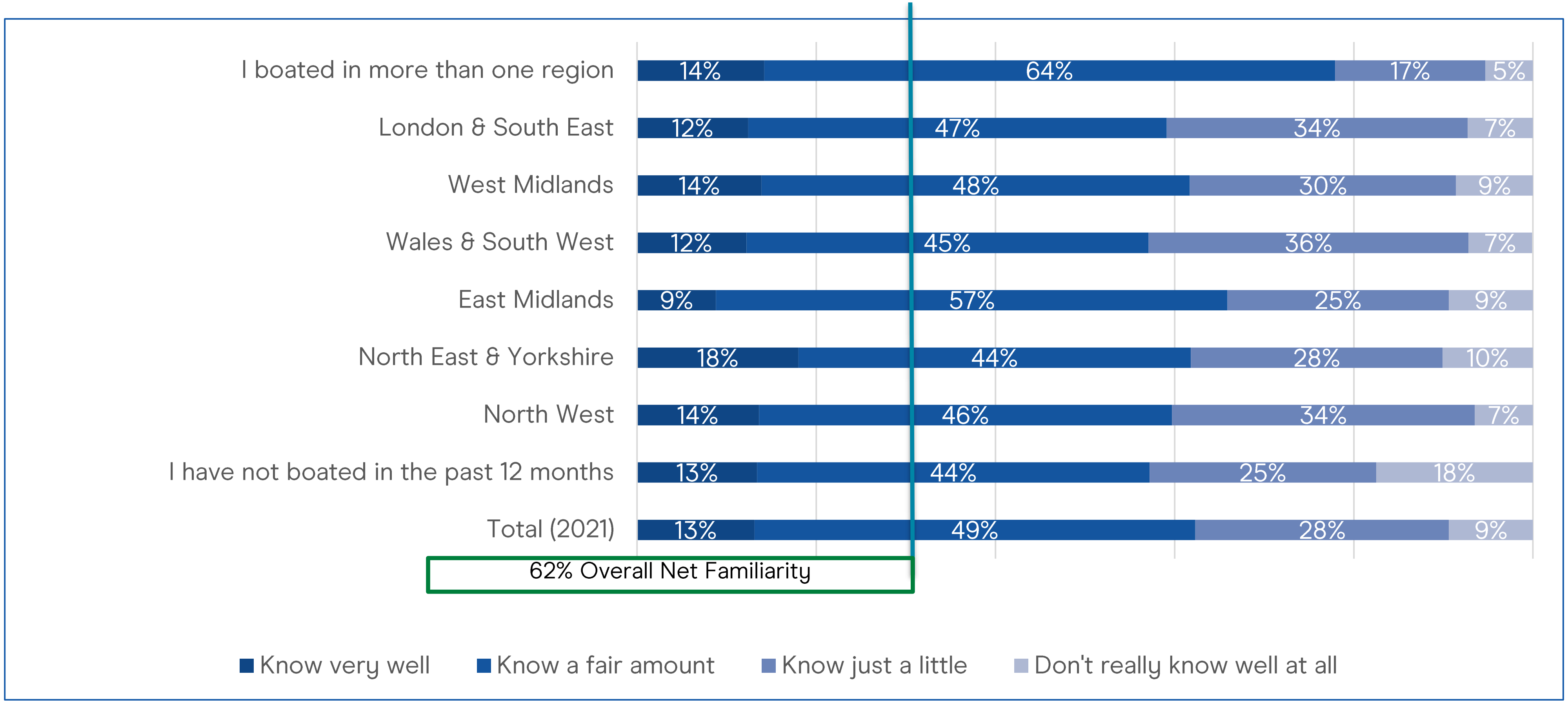


Sample: 2021 All (1179); 2020 All (960)

- Familiarity with the Trust remains essentially the same as 2019 and 2020.
- *The increase is not statistically significant (p=0.49)*

Familiarity 2021 by Region

Q8: How well do you feel you know the Canal & River Trust as an organisation i.e. the charity itself, not the waterways?
Please select one answer only

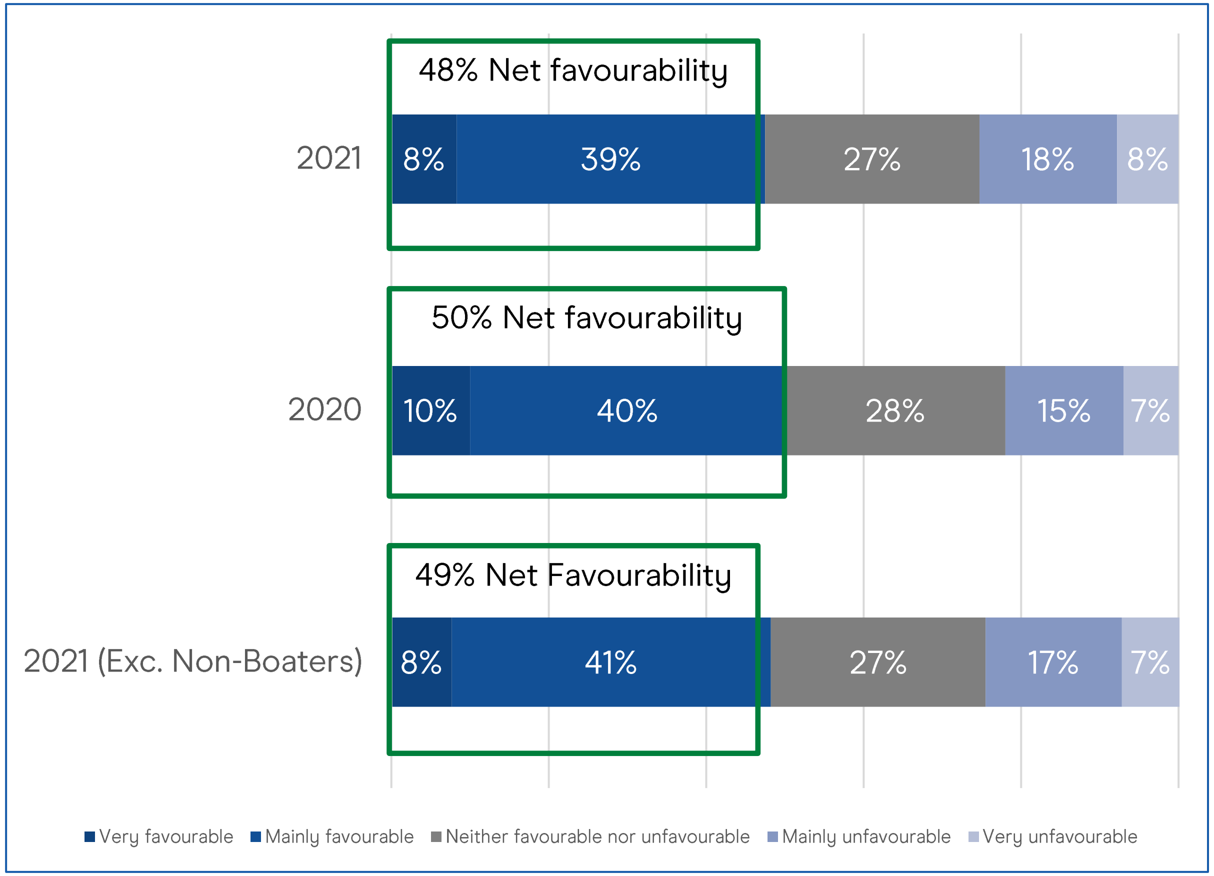


Sample: Varies depending on region
WARNING SMALL BASE SIZES

Total	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	North Wales	I boated in more than one region
1170	194	154	89	170	98	209	137	6	113

Favourability 2021 v 2020

Q9: How favourable or unfavourable is your overall opinion or impression of the Canal & River Trust?
Please select one answer only

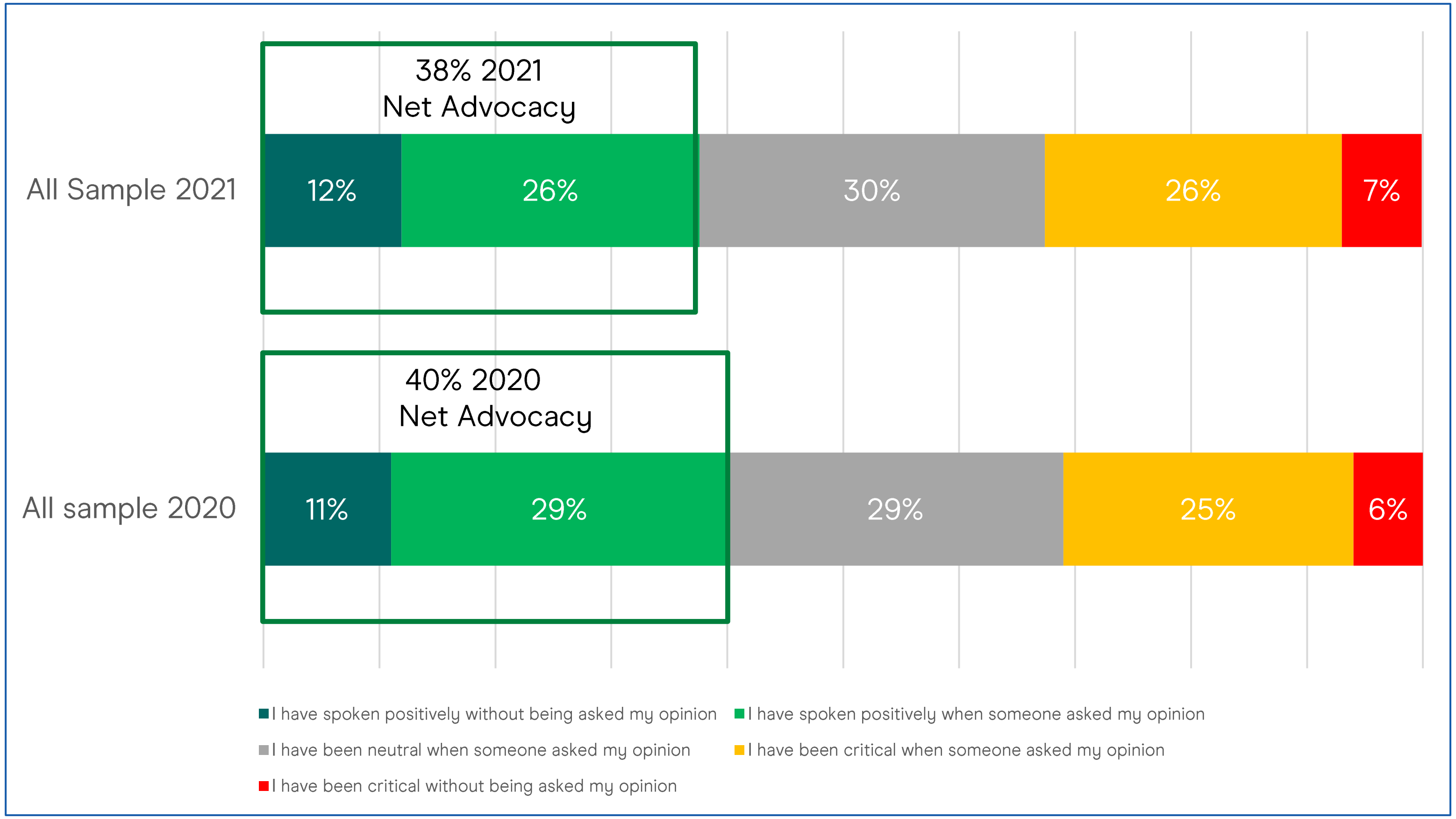


Sample: 2021 All (1179); 2020 All (960)

- Favourability with the Trust remains essentially the same as 2020.
  - *The decrease is not statistically significant.*
- Also shown is the 2021 sample, excluding those who said they did not boat – a new option for 2021.
  - It could be argued that in certain instances it is valid to compare 2020 data against 2021 data excluding "non-boaters"
  - *There is no difference in favourability excluding those who did not boat*

Advocacy 2021 v 2020

Q10: To what extent have you spoken positively or critically about the Canal & River Trust?
Please select one answer only

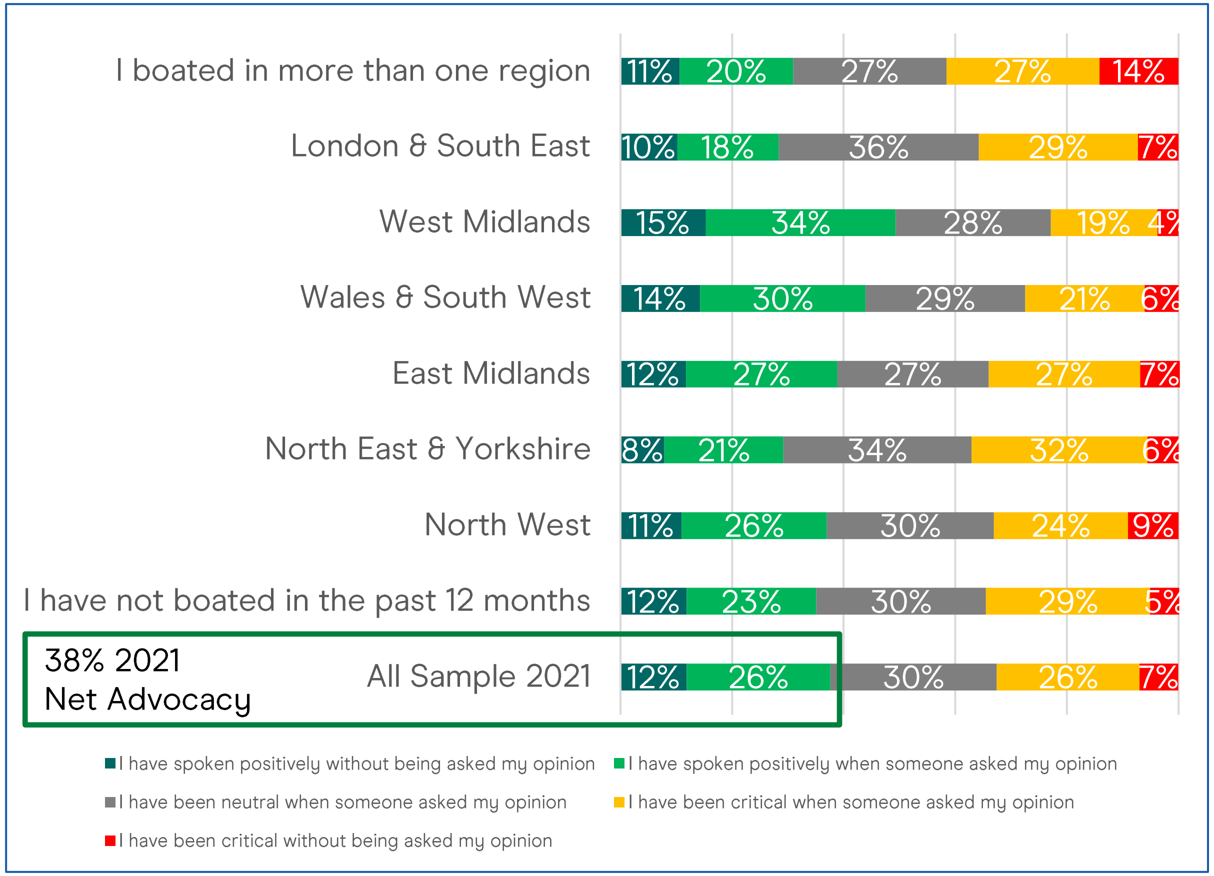


Sample: 2021 All (1179); 2020 All (960)

- Advocacy with the Trust remains essentially the same as 2020.
  - The decrease is not statistically significant.
  - Excluding those who said they did not boat in 2021 makes little numerical and no significant difference.

Advocacy 2021 by Region

Q9: How favourable or unfavourable is your overall opinion or impression of the Canal & River Trust?
Please select one answer only



- Advocacy (like favourability) does appear to vary across the regions.
- *However, the sample sizes vary considerably and so even a large difference between:*
  - *London and South East (Net. Advocacy of 28% v. West Midlands (49%) is not significant.*
  - *Is not statistically significant*
- However, it is worth noting the commonality of scoring in the areas

Sample: Varies depending on region
WARNING SMALL BASE SIZES

Total	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	North Wales	I boated in more than one region
1170	194	154	89	170	98	209	137	6	113

Advocacy 2021 by Craft

Q10: To what extent have you spoken positively or critically about the Canal & River Trust?
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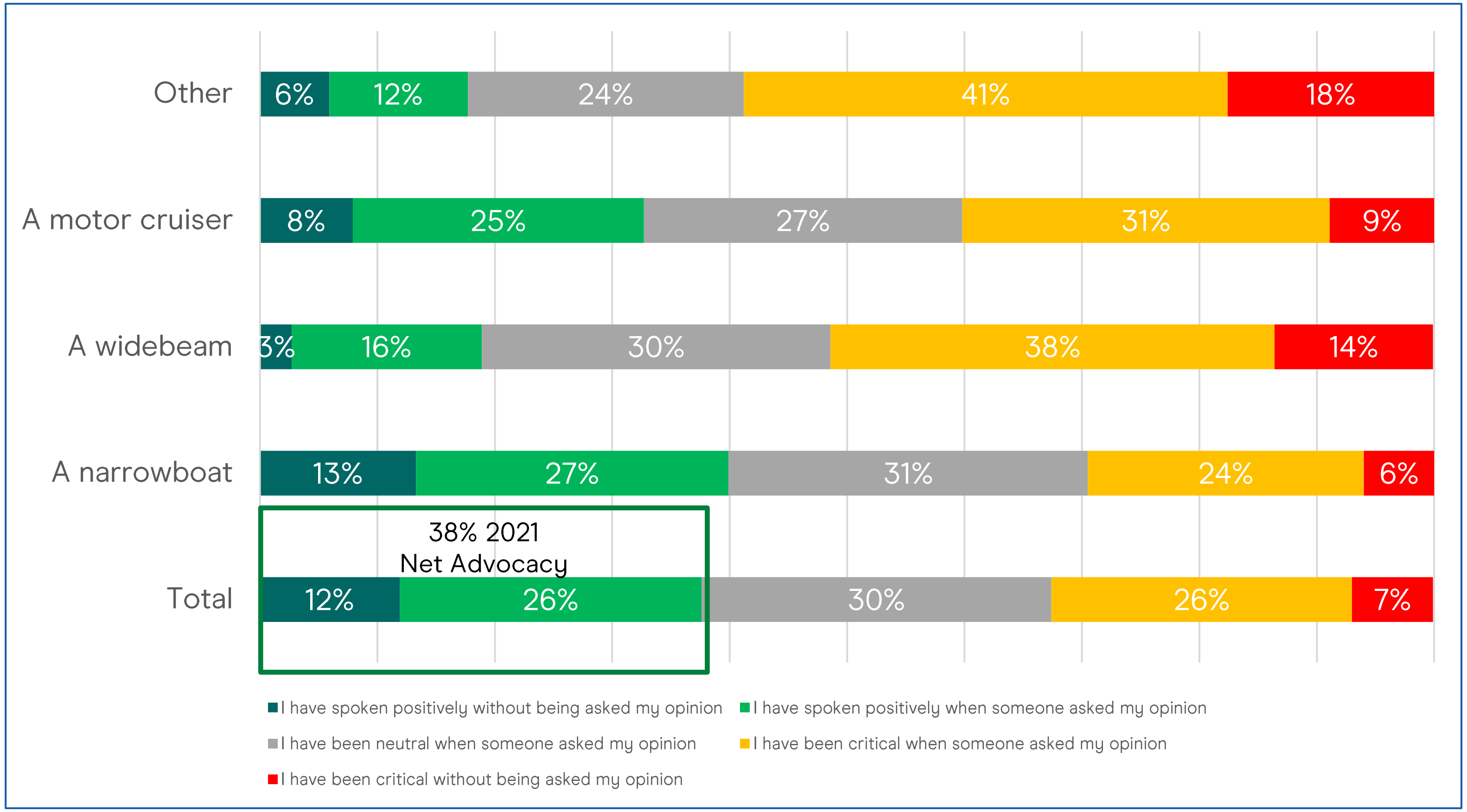
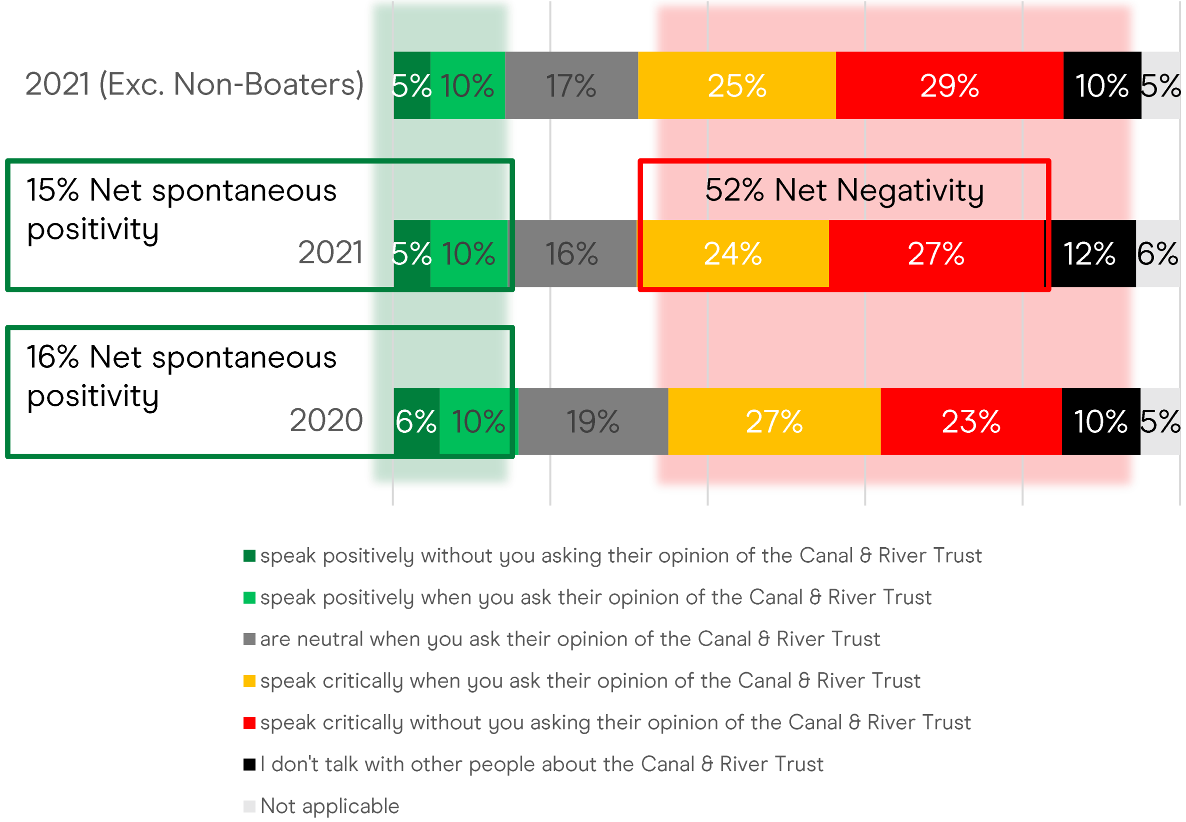


- Advocacy is lowest amongst the Wide beam community: 19%
- Narrowboats: 40%
- Motor Cruiser: 33%

Sample: 2021 All (1179); 2020 All (960)

Word of Mouth 2021 v 2020

Q11: Thinking about occasions when you have talked with other people about the Canal & River Trust, do people mainly.....

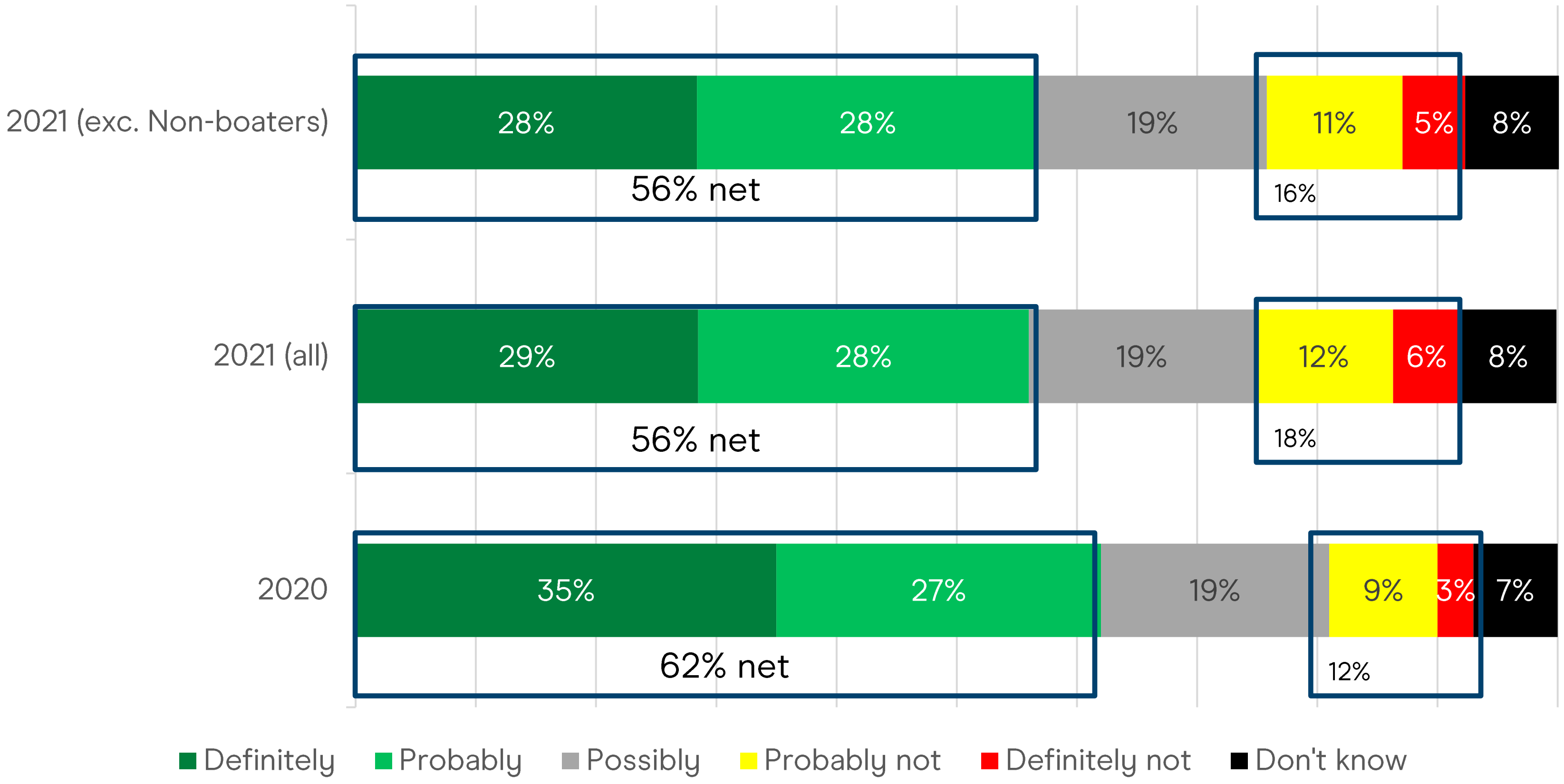


Sample: 2021 All (1179); 2020 All (960)

- Word of mouth or whether people do speak positively or negatively about the Trust, shows FAR more people likely to be critical either when an opinion is asked for or not.
- This is broadly the same for 2021 and 2020 and is also true if those who did not boat in 2021 are excluded from the sample.

Propensity to Recommend 2021 v 2020

Q15: How likely are you to recommend the Canal & River Trust's waterways to other boaters?



- Propensity to recommend **has gone down compared to 2020**.
- Even excluding non-boaters for 2021, there is no difference suggesting that whatever has changed has less to do with the actual experience of boating.

Sample: 2021 n=1168, 2020 n=960, 2021 (excluding non-boaters from Q2) n=974

Propensity to Recommend 2021

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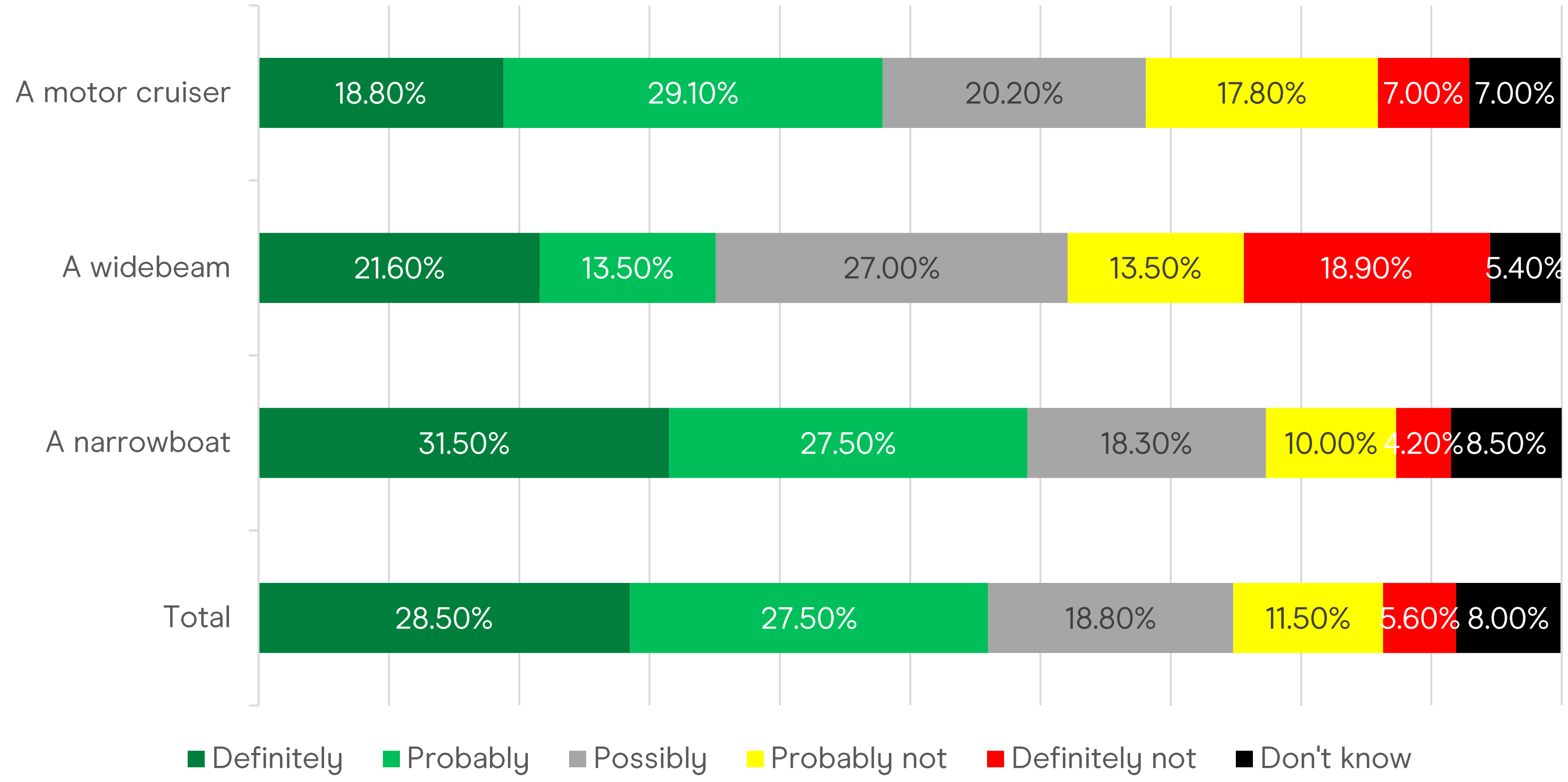

- Propensity to recommend has gone down compared to 2020.
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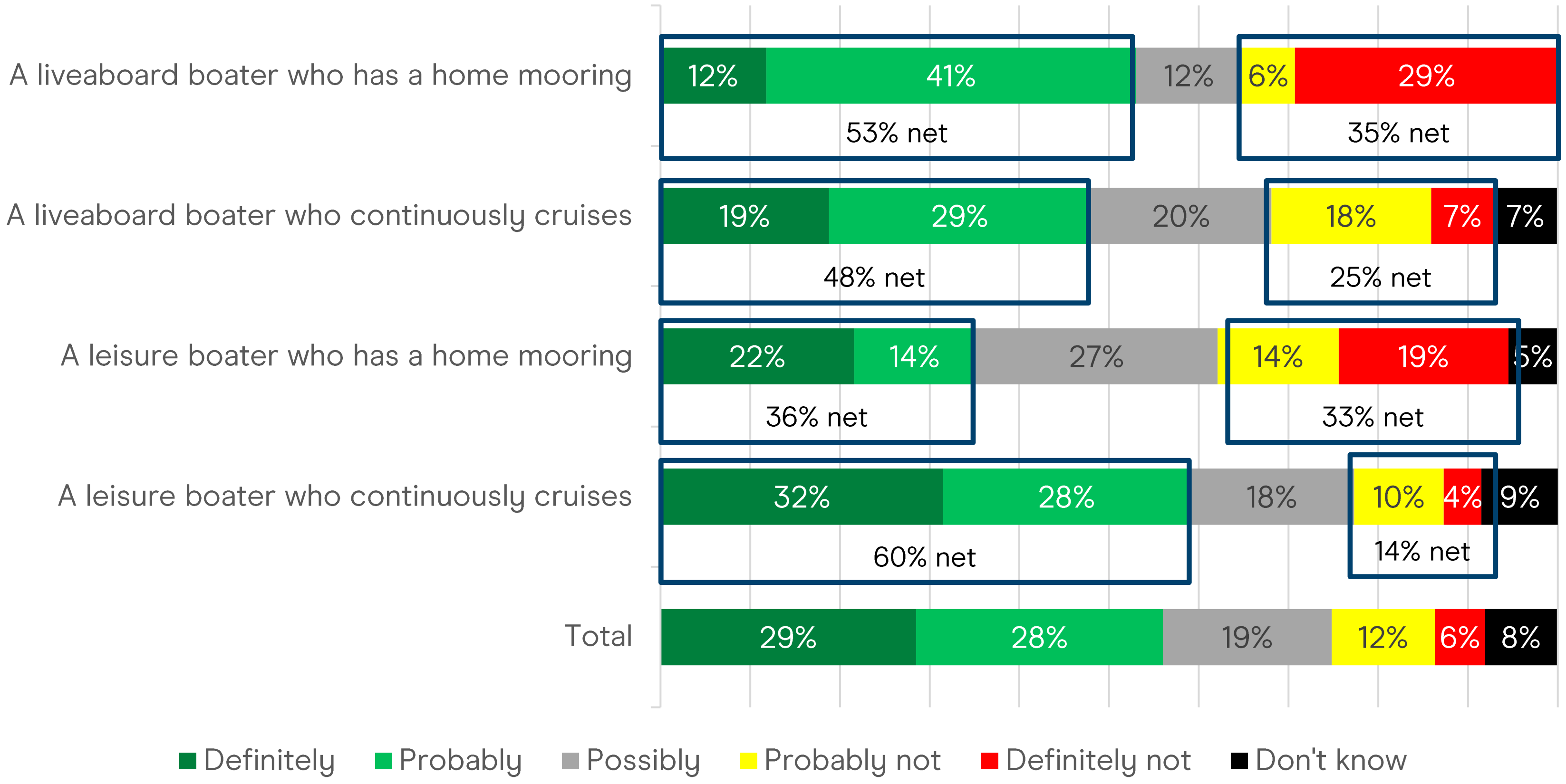
Sample: 2021 n=1168, 2020 n=960, 2021 (excluding non-boaters from Q2) n=974

Propensity to Recommend 2021 by Boater Type

Q15: How likely are you to recommend the Canal & River Trust's waterways to other boaters?



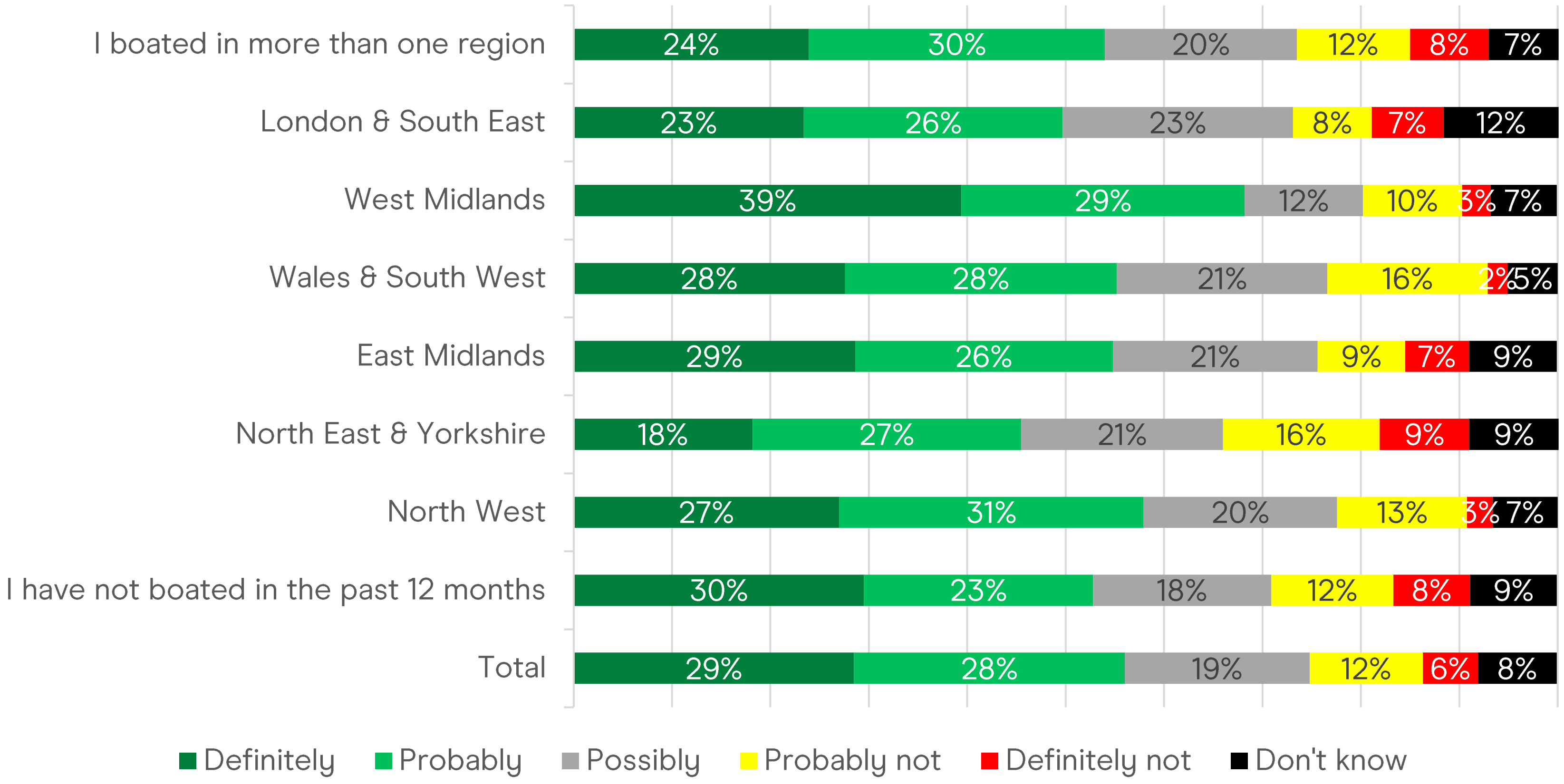
- Polarization is the most interesting aspect of this chart:
- Liveaboards are much more likely to show this within group polarization i.e.: strong views either way.
- Continuous cruisers are much more uniform in the views, albeit leisure CC's are much more likely to recommend the Trust

Sample: 2021

Total	A narrowboat	A widebeam	A motor cruiser
1163	896	37	213

Propensity to Recommend 2021: By Region

Q15: How likely are you to recommend the Canal & River Trust's waterways to other boaters?



- Regional variations are in step with other metrics

Sample: 2021 n=1168	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	North Wales	I boated in more than one region
	193	152	88	168	98	208	137	6	113

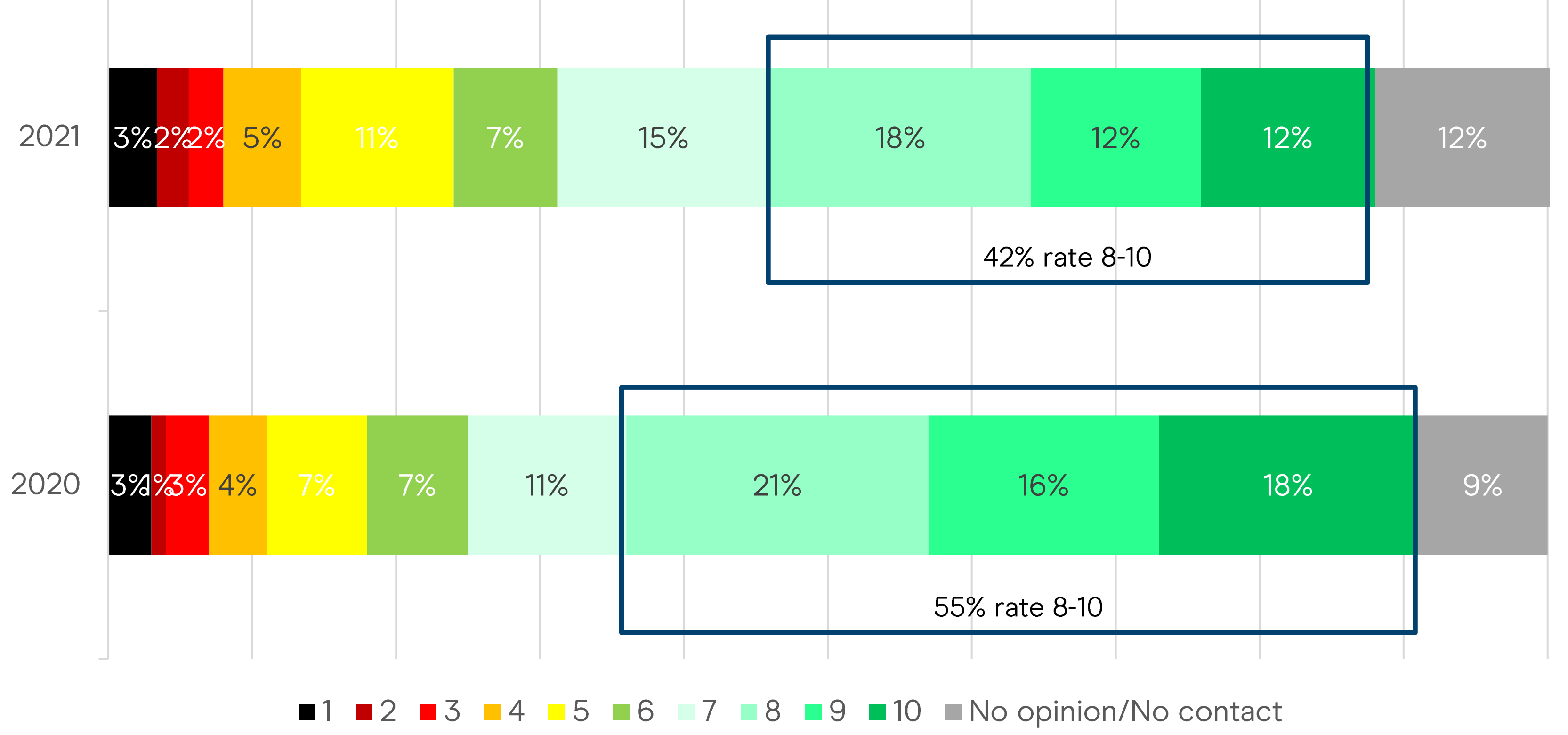
Customer Service

5

Customer service metrics

Overall Customer Service 2020 v 2021

Q20: And overall, as a boater, how would you rate the customer service you have received from the Canal & River Trust staff and volunteers over the past year?
Please select one answer only

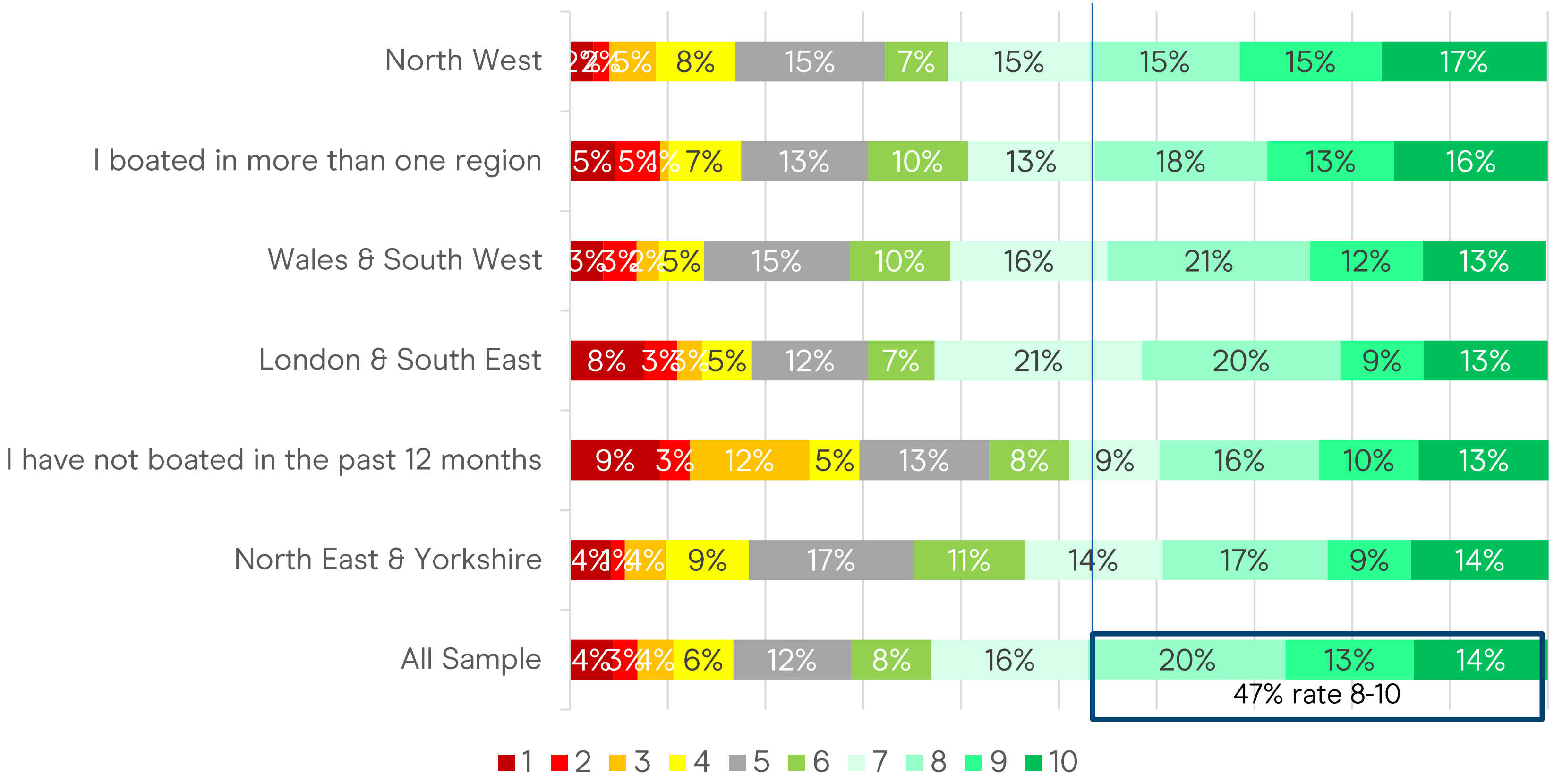


- Slightly fewer people experienced customer service interactions in 2021 (grey boxes).
- Difference in net rating (8-10) between 2020 and 2021 is **<u>not statistically significant.</u>**

Sample: 2021 n=1168
2020 n=960

Customer Service 2021 by Region

Q20: And overall, as a boater, how would you rate the customer service you have received from the Canal & River Trust staff and volunteers over the past year? [10 point rating scale VERY POOR – EXCELLENT]
Please select one answer only



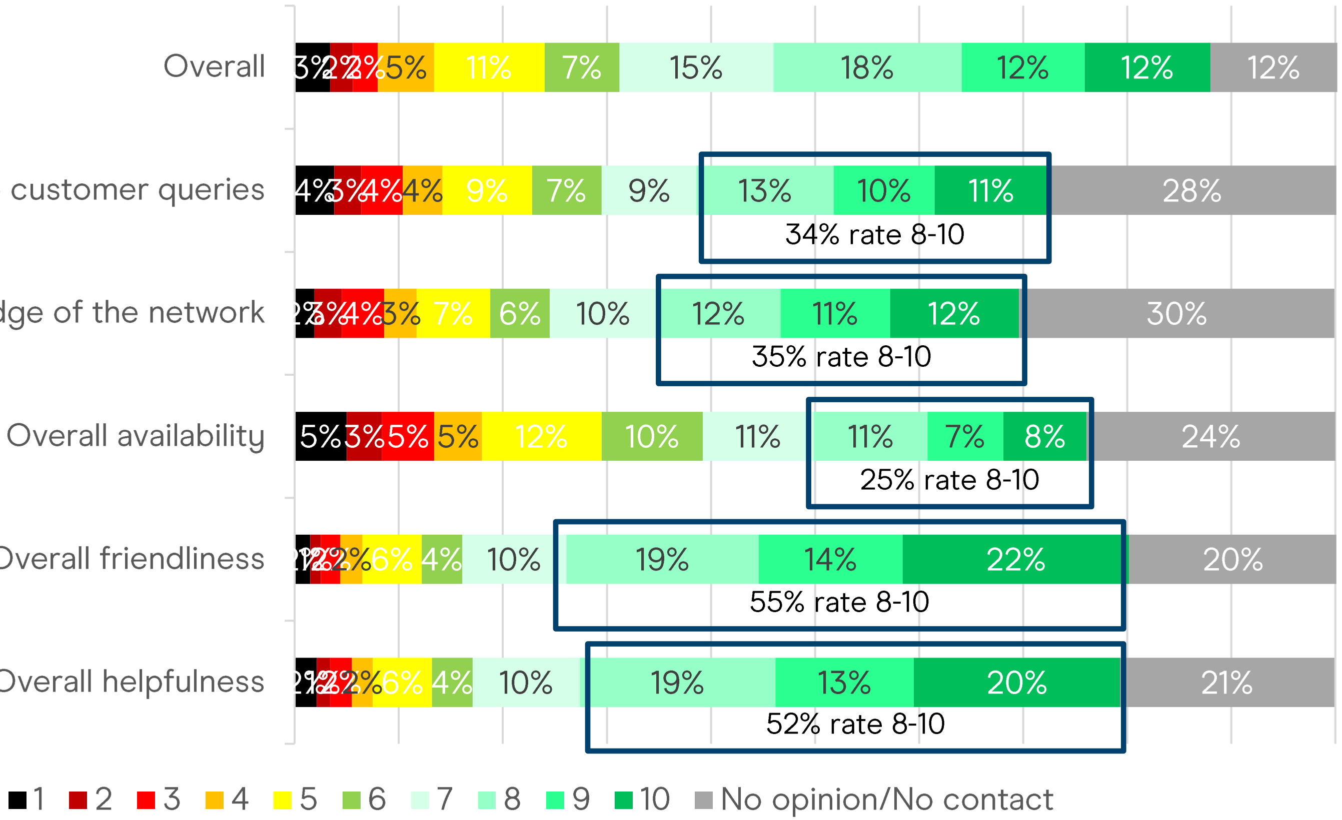
- Slightly fewer people experienced customer service interactions in 2021 (grey boxes).
- This chart shows the % ratings <u>only for those who used the services</u>
  - Top is the North West
  - Bottom is North East & Yorkshire

Sample: 2021 n=955 (those who had a customer service interaction, note varies by region)

Total Sample	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	North Wales	I boated in more than one region
955	98	124	71	152	87	191	118	6	108

Customer Service 2021: Apects

Q16:Thinking about Canal & River Trust staff you saw out and about on the waterways, how do you rate them for….?
Please select one answer per row
Q20: And overall, as a boater, how would you rate the customer service you have received from the Canal & River Trust staff and volunteers over the past year?
Please select one answer only



- Large numbers had few interactions with customer service in 2021:
- The Trust is scored well on:
  - Helpfulness
  - Friendliness
- Less well on:
  - Availability

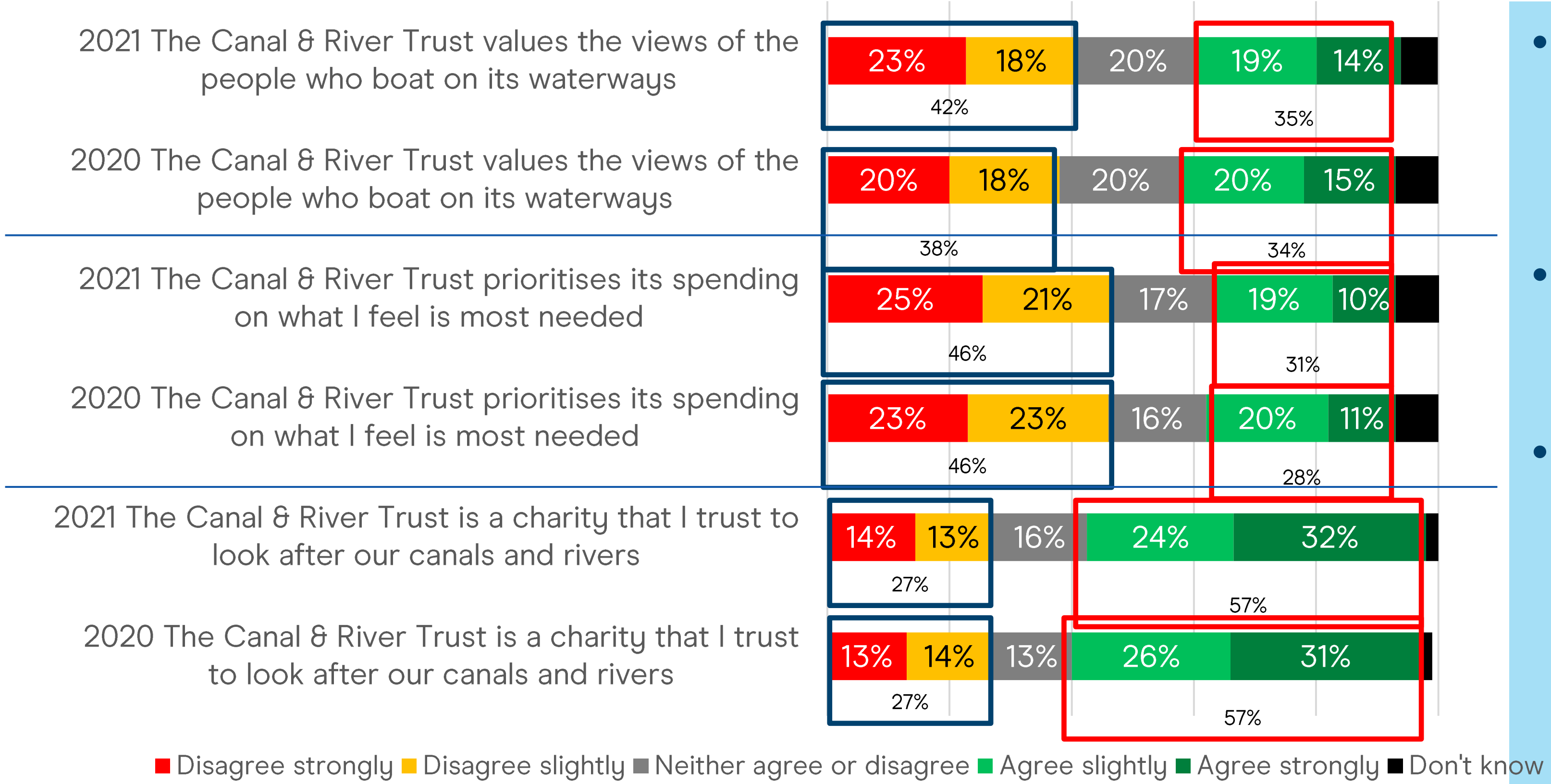
Sample: 2021 n=1168

Attitudes Towards the Trust

6

Attitudinal 2020 v 2021

Q21: To what extent do you agree or disagree with each of these statements about the Canal & River Trust?
Please select one box for each row

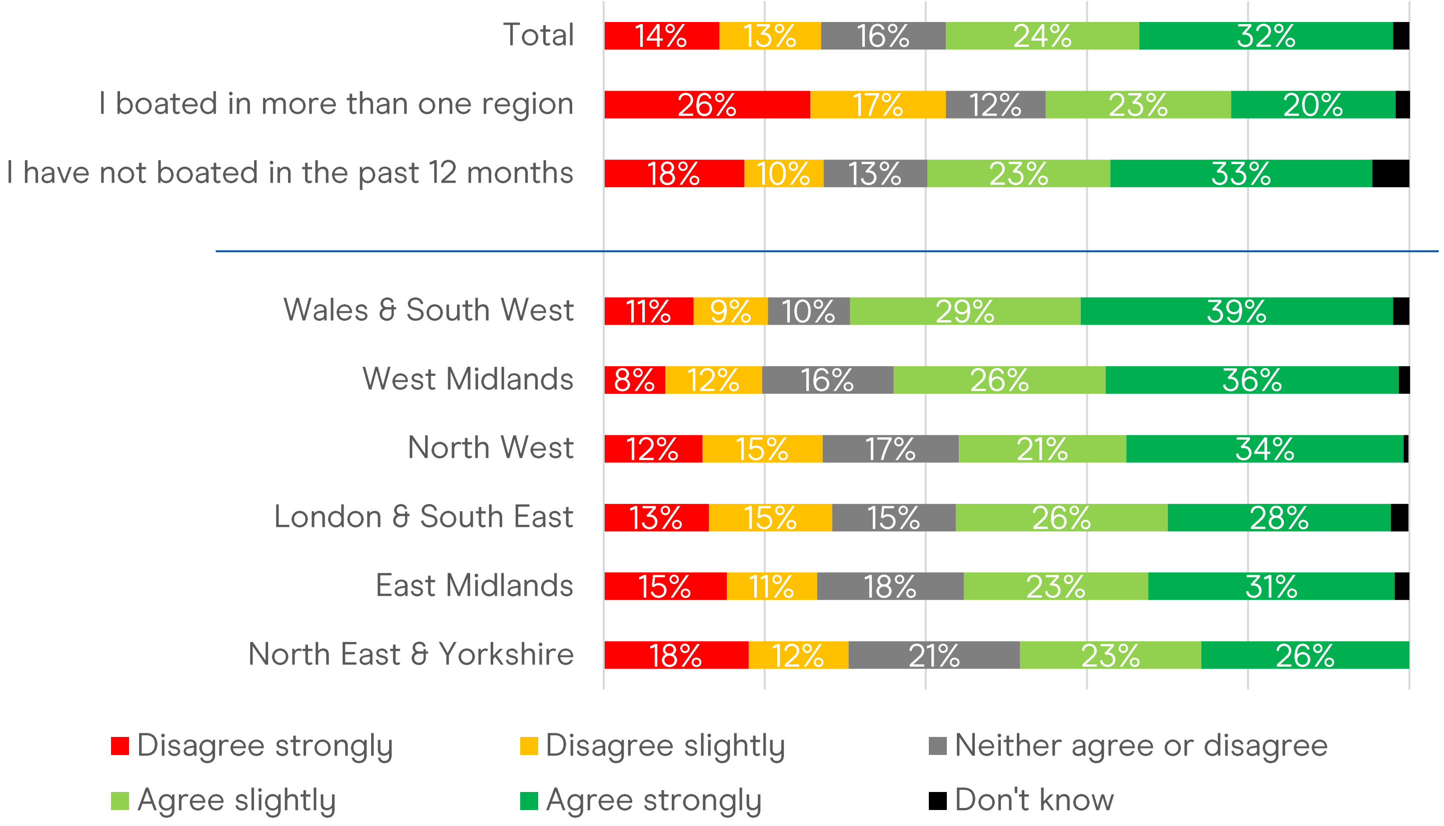


Sample: 2021 n=1168
2020 n=960

- All the attitudinal questions show that a sizeable proportion of respondents hold negative views about the Trust.
- Views about spending prioritisation are particularly negative followed by 'valuing the views of boaters'
- The comparatively better scoring "is a charity I trust" is very significant as it is a key driver in the main KPI. *Thus small changes in it, will impact the KPI*

Attitudinal 2021: Trust

Q21: To what extent do you agree or disagree with each of these statements about the Canal & River Trust?
The Canal & River Trust is a charity that I trust to look after our canals and rivers



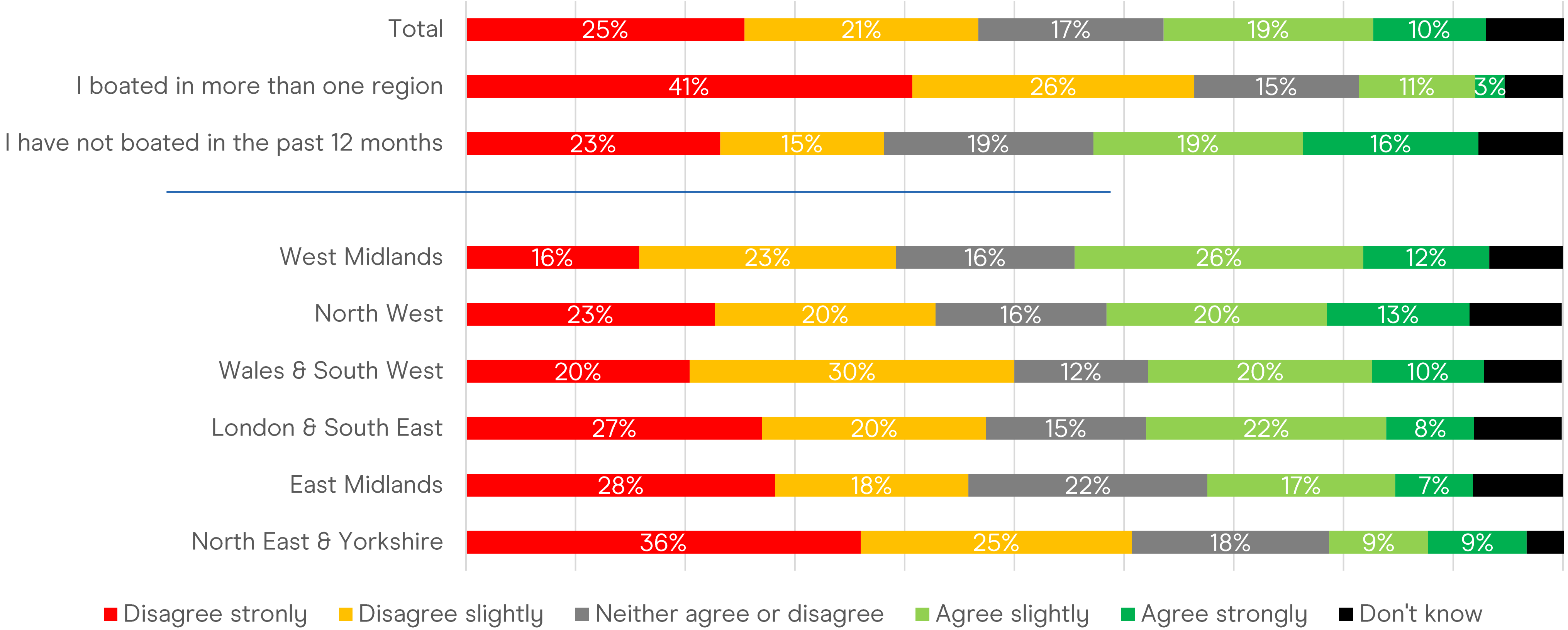
- Wales & South West lead on this aspect, with North East & Yorkshire coming last.
- *Interesting to note that those who didn't boat in the last 12 months did not rate this statements much differently than other boaters*

Sample: 2021 n=1170
2020 n=960

Total	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	I boated in more than one region
1170	194	154	89	170	98	209	137	113

Attitudinal 2021: Spending Priorities

Q21: To what extent do you agree or disagree with each of these statements about the Canal & River Trust?
The Canal & River Trust prioritises its spending on what I feel is most needed

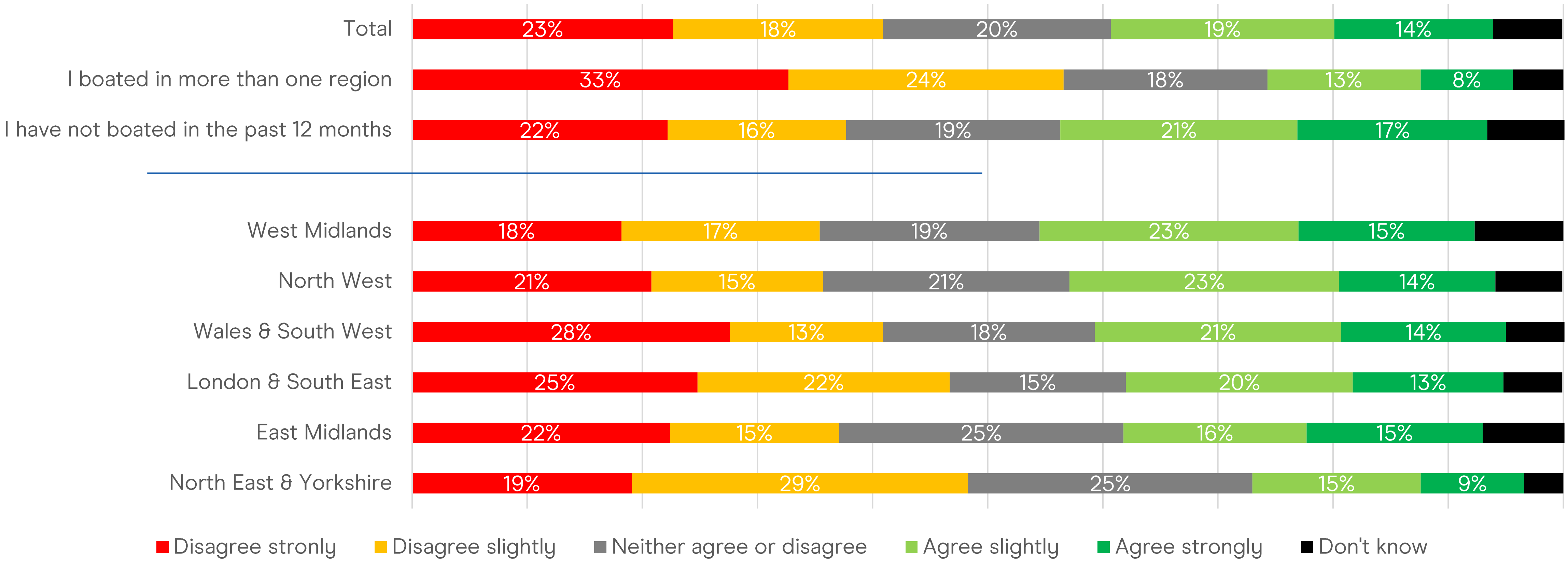


Sample: 2021 n=1168
2020 n=960

Total	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	I boated in more than one region

Attitudinal 2021: Values Our Views

Q21: To what extent do you agree or disagree with each of these statements about the Canal & River Trust?
The Canal & River Trust values the views of the people who boat on its waterways



Sample: 2021 n=1168
2020 n=960

Total	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	I boated in more than one region
1170	194	154	89	170	98	209	137	113

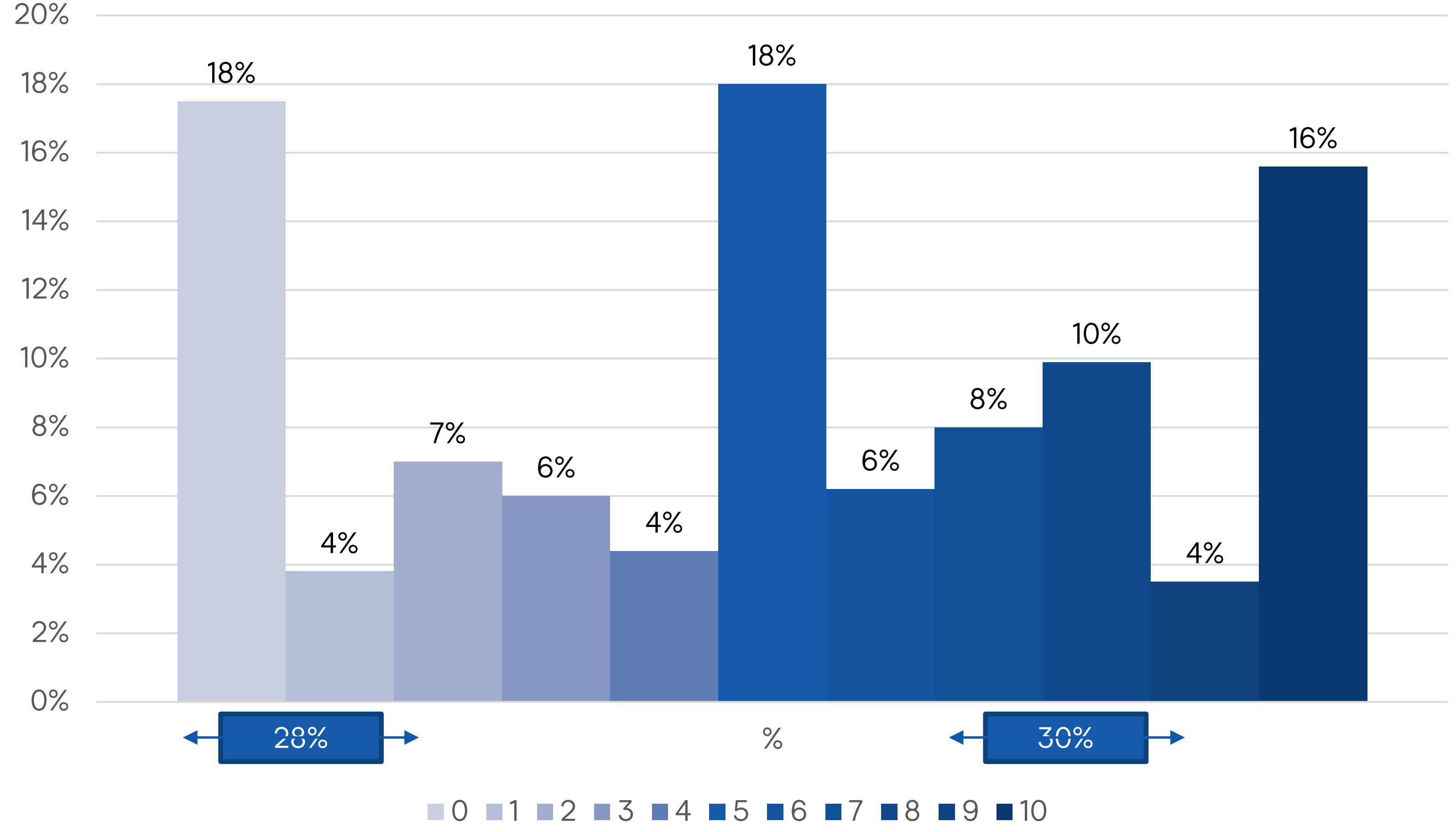
Sustainability

7

Zero Emissions 2050
Propulsion and Fuel Types
Alternative Energy Sources
Barriers and Incentives
Registration and Regulation

Support For Net Zero Emissions by 2050

Q23: On a scale of 0 to 10 how supportive are you of the Government's goal to make the UK maritime sector net zero emissions by 2050 (0= Not at all supportive and 10= Fully supportive)

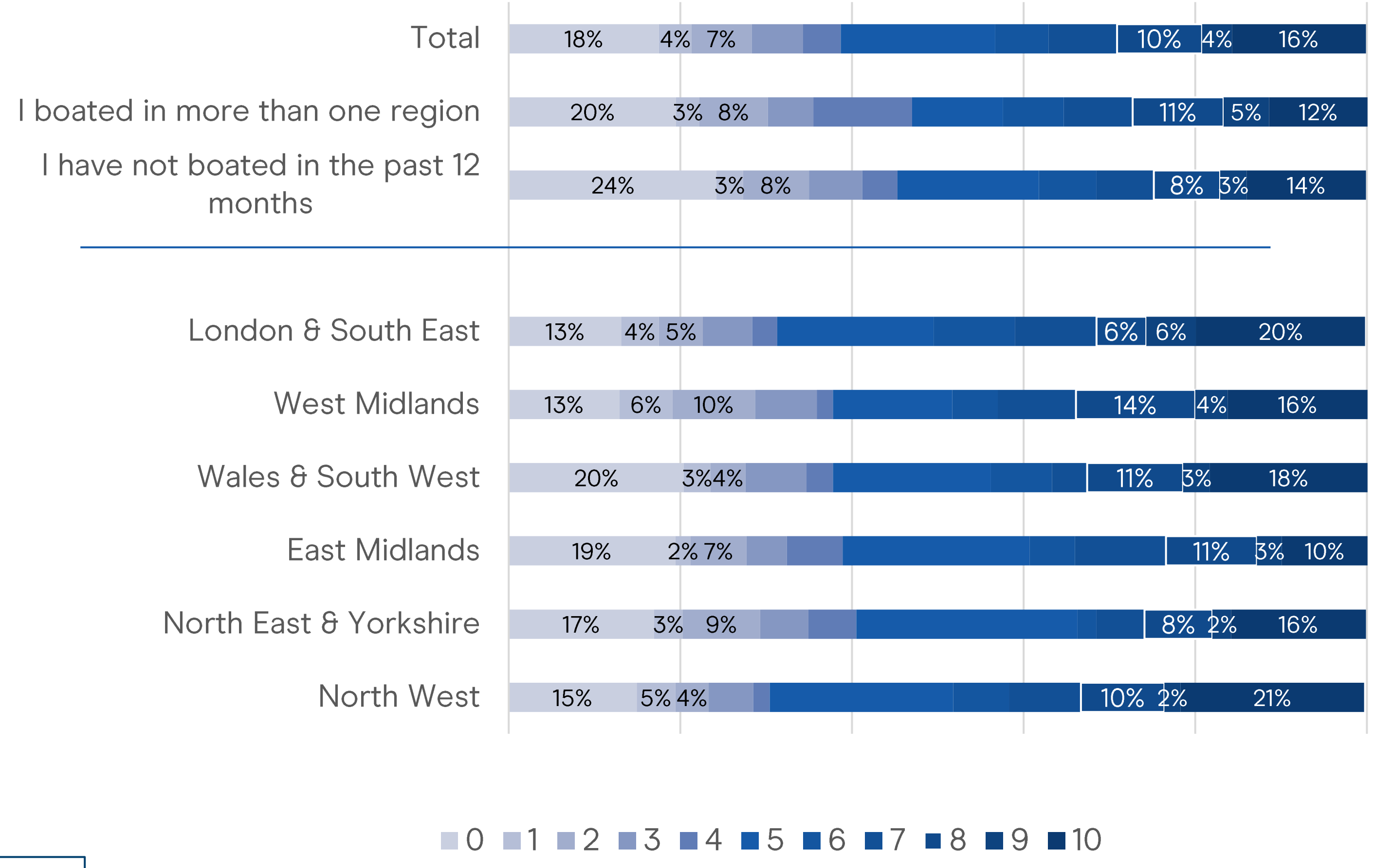


- Respondents were given both an explanation and a link of these proposals.
- The result suggests a likely combination of ambivalence and something that many are not aware of/not ever have given much thought to.

Sample: 2021 n=1170

Support For Net Zero Emissions by 2050

Q23: On a scale of 0 to 10 how supportive are you of the Government's goal to make the UK maritime sector net zero emissions by 2050 (0= Not at all supportive and 10= Fully supportive)

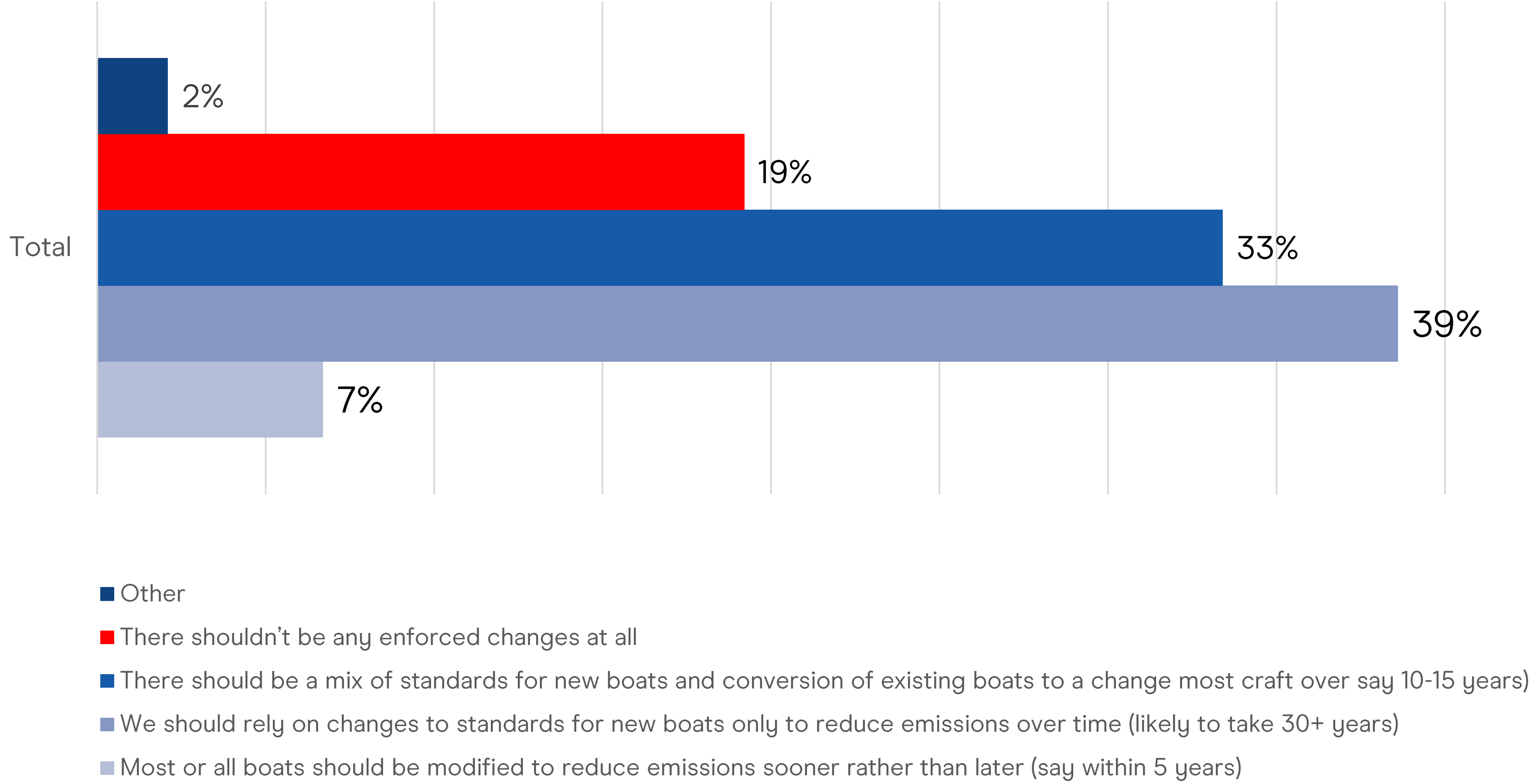


- There is very little difference in opinion on this issue no matter how it is examined: by region, boat type etc.

Sample: 2021 n=1170

Implementation: Zero Emissions by 2050

Q24: Which of the following statements most accurately reflects your views on how changes to reduce emissions should be implemented:

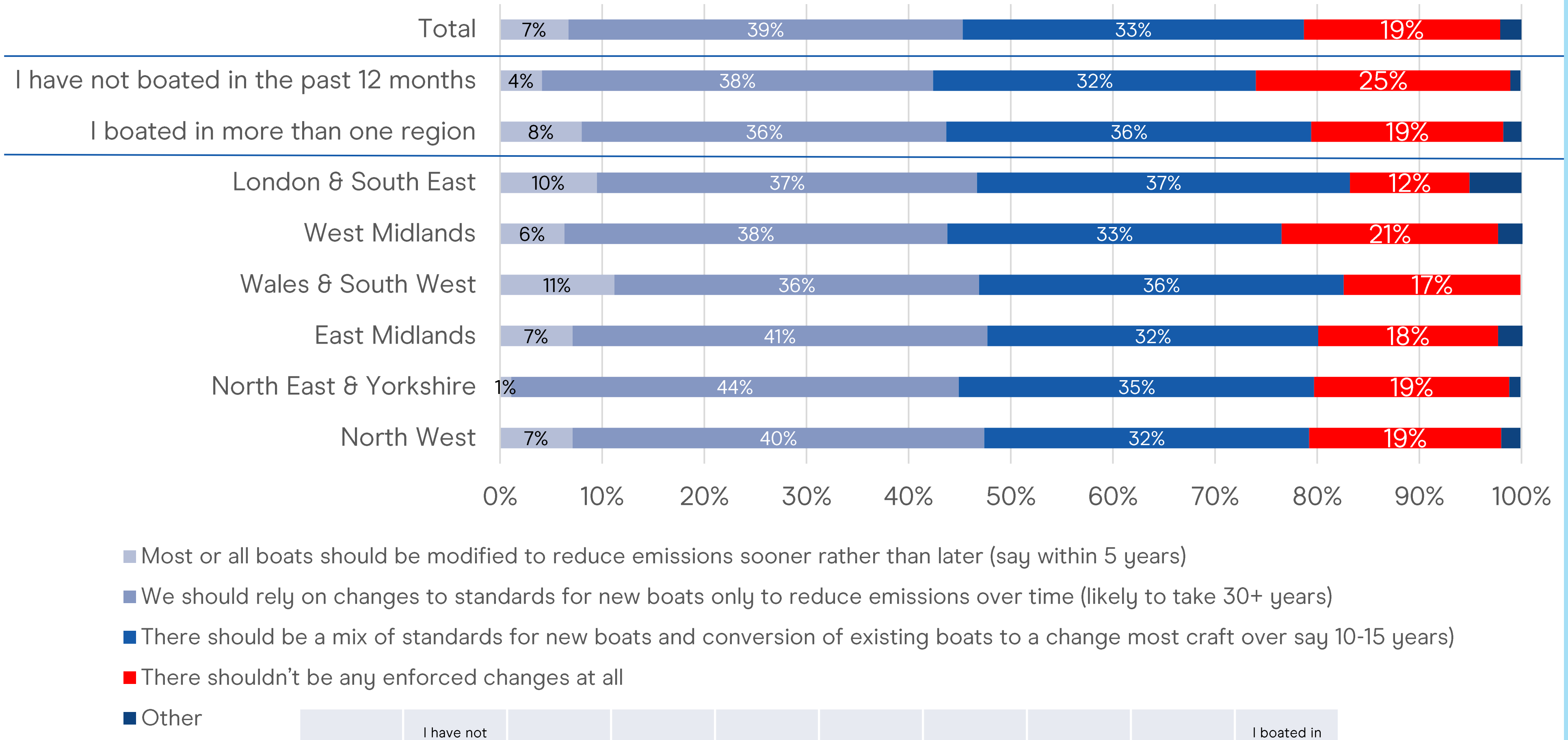


Sample: 2021 n=1170

- There is little to no appetite to modify all boats in the next 5 years (7%)
- A sizeable minority are opposed to any enforced changes (19%)
- The most often selected choice is a long process of changes to standards for new boats only (39%)
- A nearly equal proportion prefer an intermediate time scale and a mixture of approaches for all boats (33%)

Implementation: Zero Emissions by 2050

Q24: Which of the following statements most accurately reflects your views on how changes to reduce emissions should be implemented:



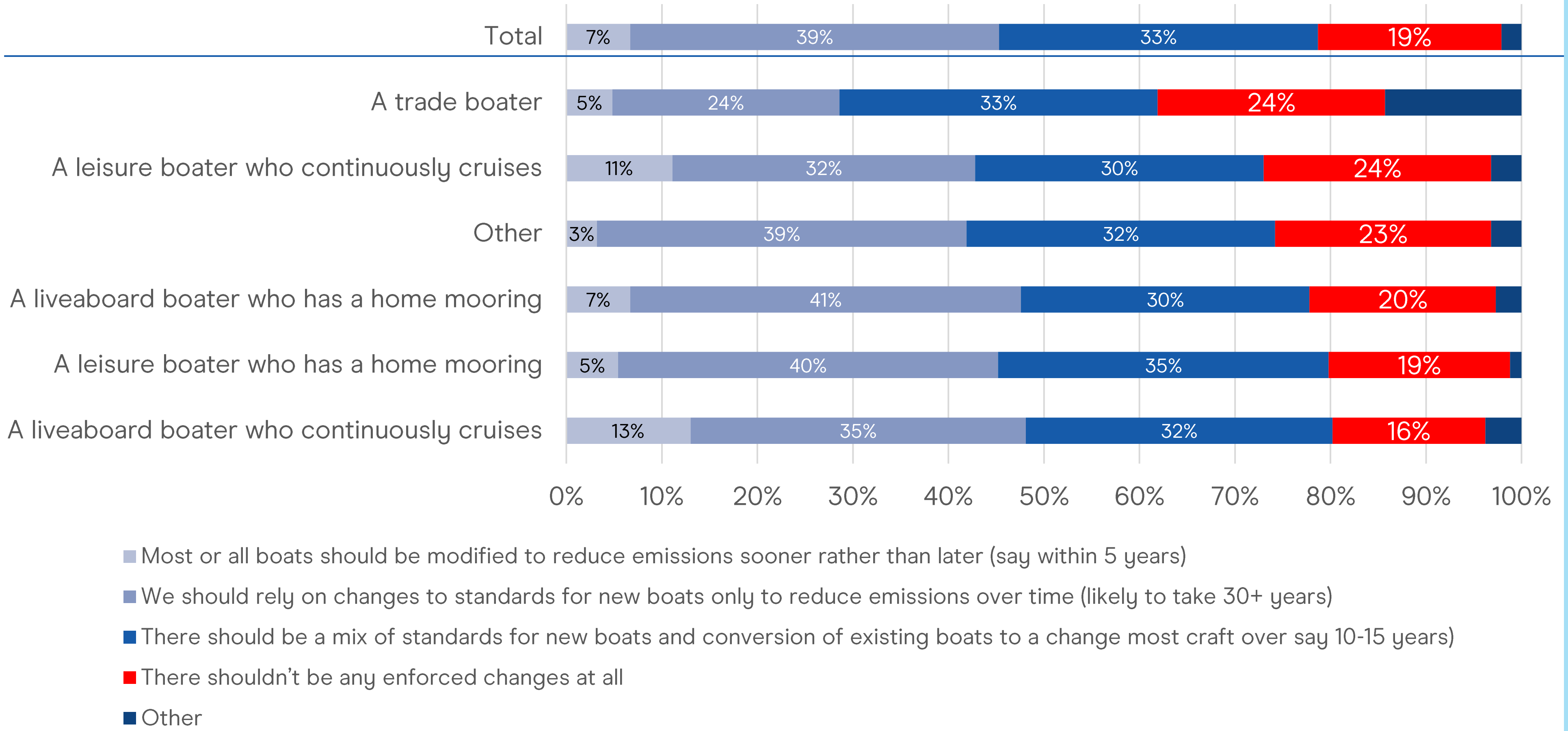
- There is little real variation by region or by other factors aside from boater type (see next slide)

Sample: 2021 n=1170

Total	I have not boated in the past 12 months	North West	North East & Yorkshire	East Midlands	Wales & South West	West Midlands	London & South East	North Wales	I boated in more than one region
1167	193	154	89	170	98	208	137	6	112

Implementation: Zero Emissions by 2050

Q24: Which of the following statements most accurately reflects your views on how changes to reduce emissions should be implemented:



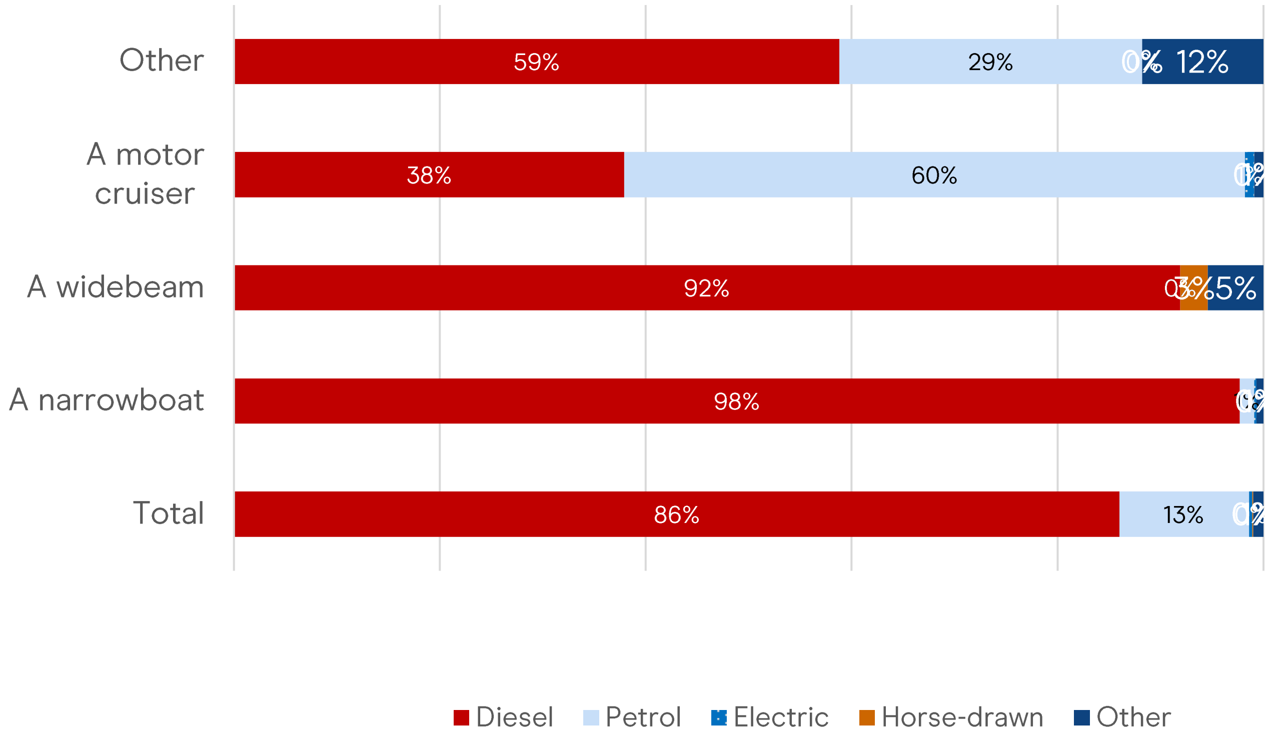
- It appears that Trade Boaters need a bit more information to decide on the implications.
- Those with the most appetite for change are Liveaboards who continuously cruise.
- Least appetite: Trade boaters and leisure boaters who continuously cruise

Sample: 2021 n=1170

Total	A leisure boater who continuously cruises	A leisure boater who has a home mooring	A liveaboard boater who continuously cruises	A liveaboard boater who has a home mooring	A trade boater	Other
1167	63	772	131	149	21	31

Propulsion: Fuel

Q25: What is the main source of fuel used for your boats propulsion?



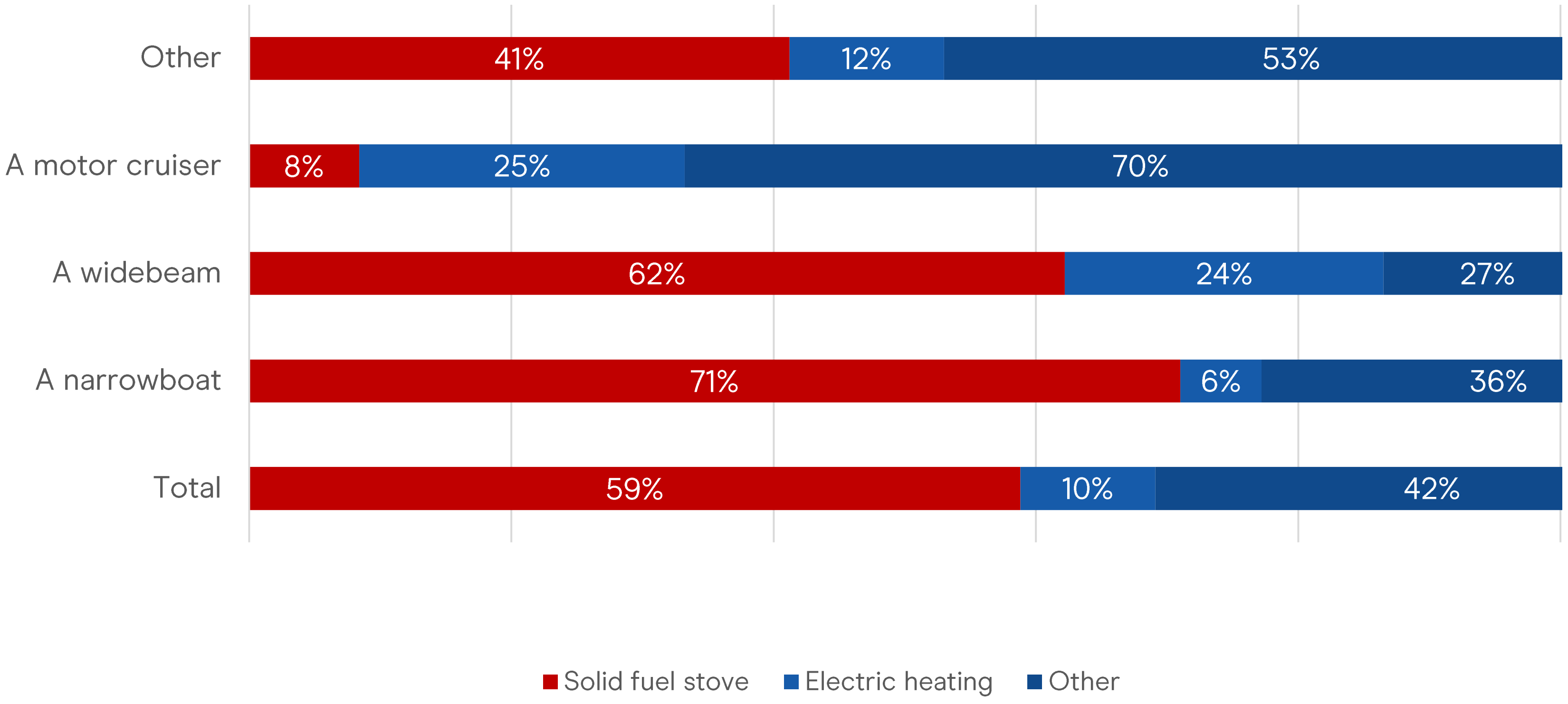
- Overall, diesel dominates. Especially in narrowboats and wide beams.
- The majority of motor cruisers are petrol powered.
- Hardly any craft are electric powered: 0.3% overall
- Motor cruisers are the type with the highest take-up of electric: 0.9%
- Narrowboats: 0.2%
- Wide beams: 0% of respondents

Sample: 2021 n=1170

Total	A leisure boater who continuously cruises	A leisure boater who has a home mooring	A liveaboard boater who continuously cruises	A liveaboard boater who has a home mooring	A trade boater	Other
1167	63	772	131	149	21	31

Heating: Fuel

Q26: What is the main source of power used to heat your boat? (Please select all that apply)



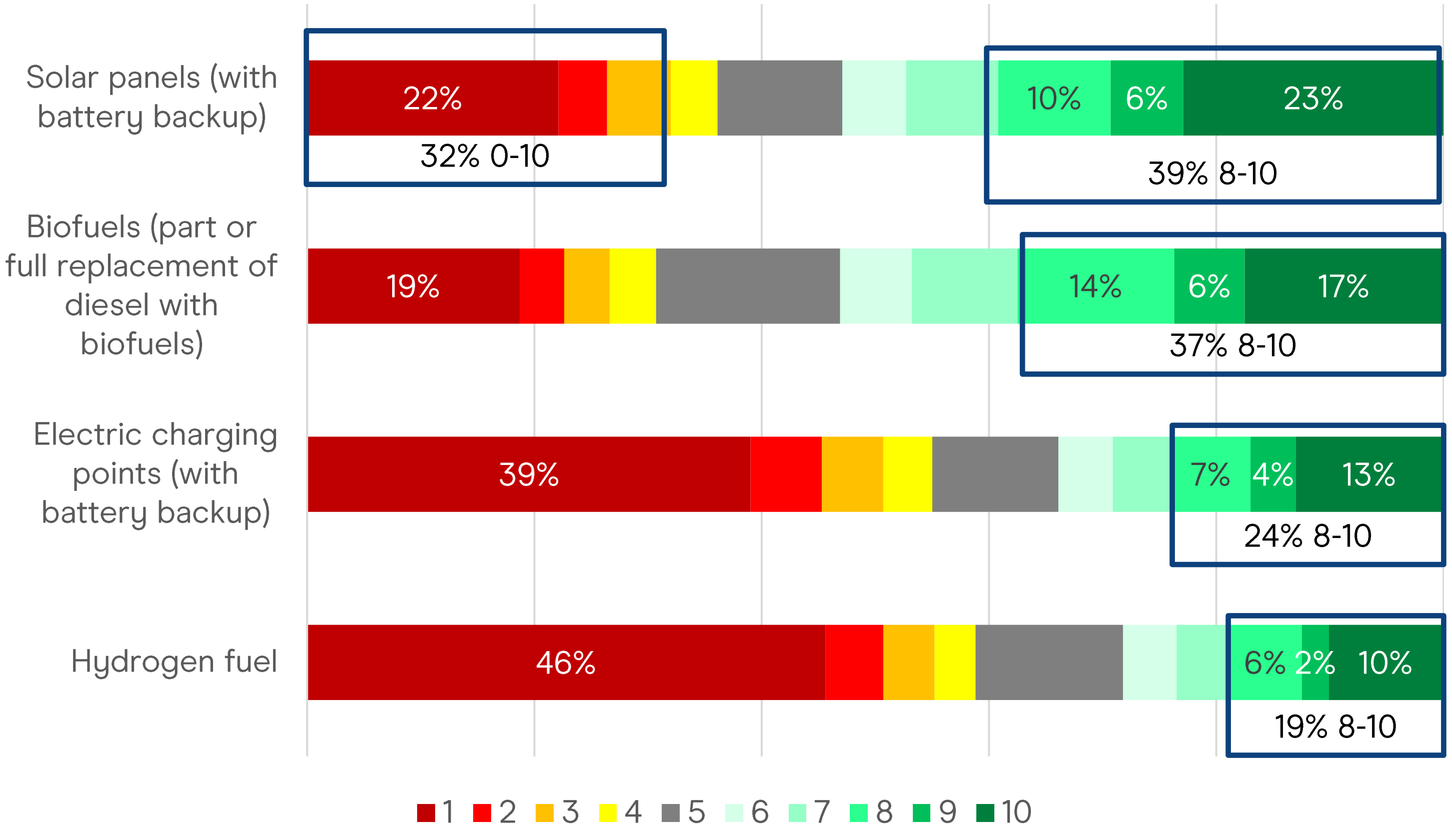
- Solid fuel is the primary source used for heating, although this varies considerably – primarily by boat type.

Sample: 2021 n=1170

1170	902	37	214	17
Total	A narrowboat	A widebeam	A motor cruiser	Other

Alternative Power Sources: Viability

Q27: Please indicate on a scale of 1 to 10 to what extent do you think the following alternative sources of power would be a viable way to reduce emissions from your boat (1 = not viable at all and 10 = very viable)

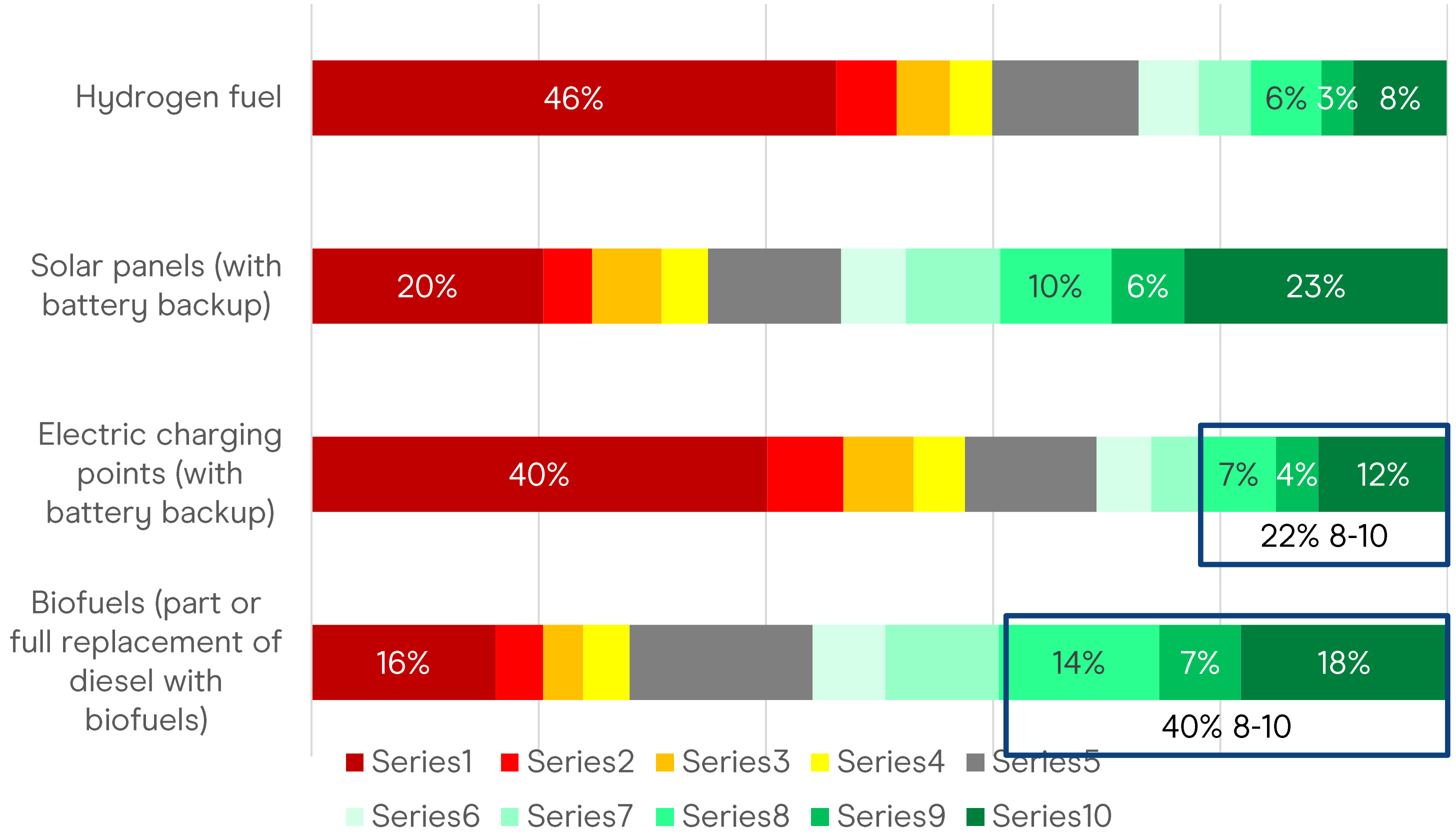


Sample: 2021 n=1170

- Current technology is typically preferred with solar panels and biofuels coming top (also requiring fewest expensive modification)
- Even with these options, many don't think these are a viable way of reducing emissions from their boat (in the case of solar panels, the most popular choice, 32% rated these 0-3 for viability)
- **Interestingly, electric charging points are considered only by a minority to be viable. 39% rated these as 0 out of 10!**

Alternative Power Sources: Narrowboats

Q27: Please indicate on a scale of 1 to 10 to what extent do you think the following alternative sources of power would be a viable way to reduce emissions from your boat (1 = not viable at all and 10 = very viable)

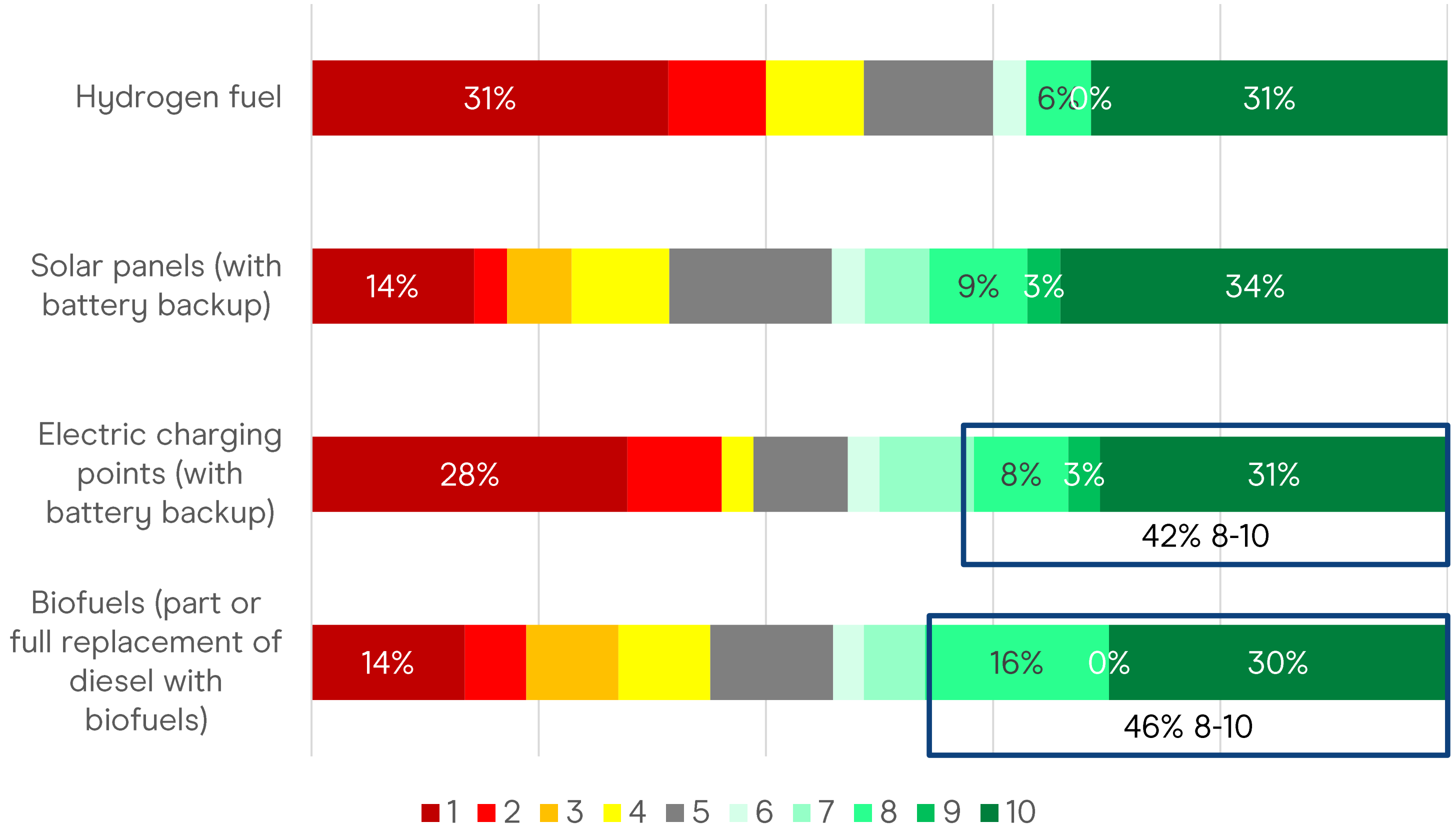


- Narrowboats highest viability:
  - Biofuels
  - Solar panels
- Interestingly, electric charging points are considered only by a minority to be viable. 40% rated these as 0 out of 10!

Sample: 2021 n=902

Alternative Power Sources: Wide beam

Q27: Please indicate on a scale of 1 to 10 to what extent do you think the following alternative sources of power would be a viable way to reduce emissions from your boat (1 = not viable at all and 10 = very viable)

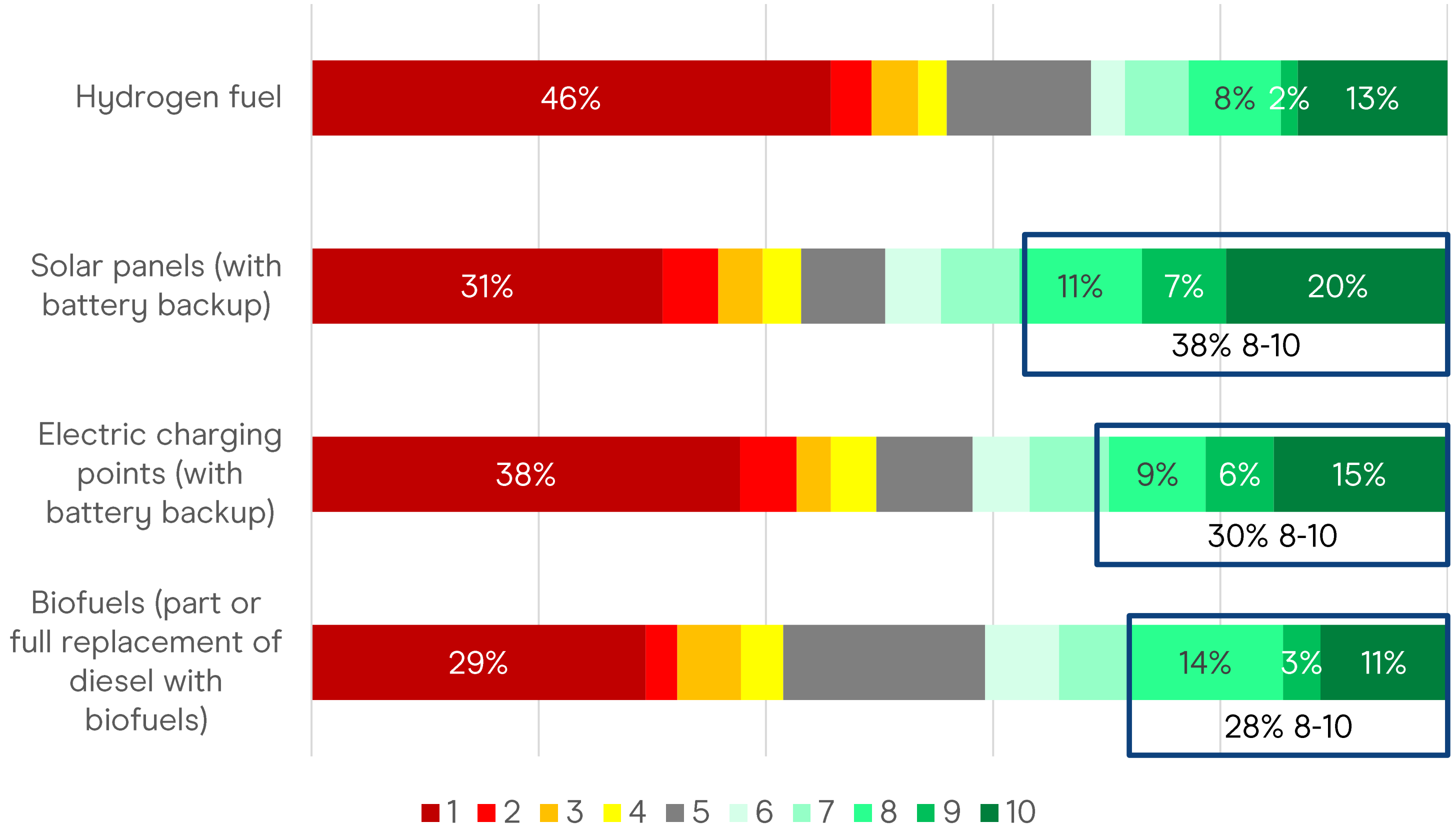


Sample: 2021 n=37

- Caution small base sizes
- Wide beam respondents appear to be much more amenable to different options, although there is a strong contingent that rated all the ideas as zero. highest viability:
  - Biofuels
  - Solar panels
- Interestingly, electric charging points are considered only by a minority to be viable. 40% rated these as 0 out of 10!

Alternative Power Sources: Narrowboats

Q27: Please indicate on a scale of 1 to 10 to what extent do you think the following alternative sources of power would be a viable way to reduce emissions from your boat (1 = not viable at all and 10 = very viable)



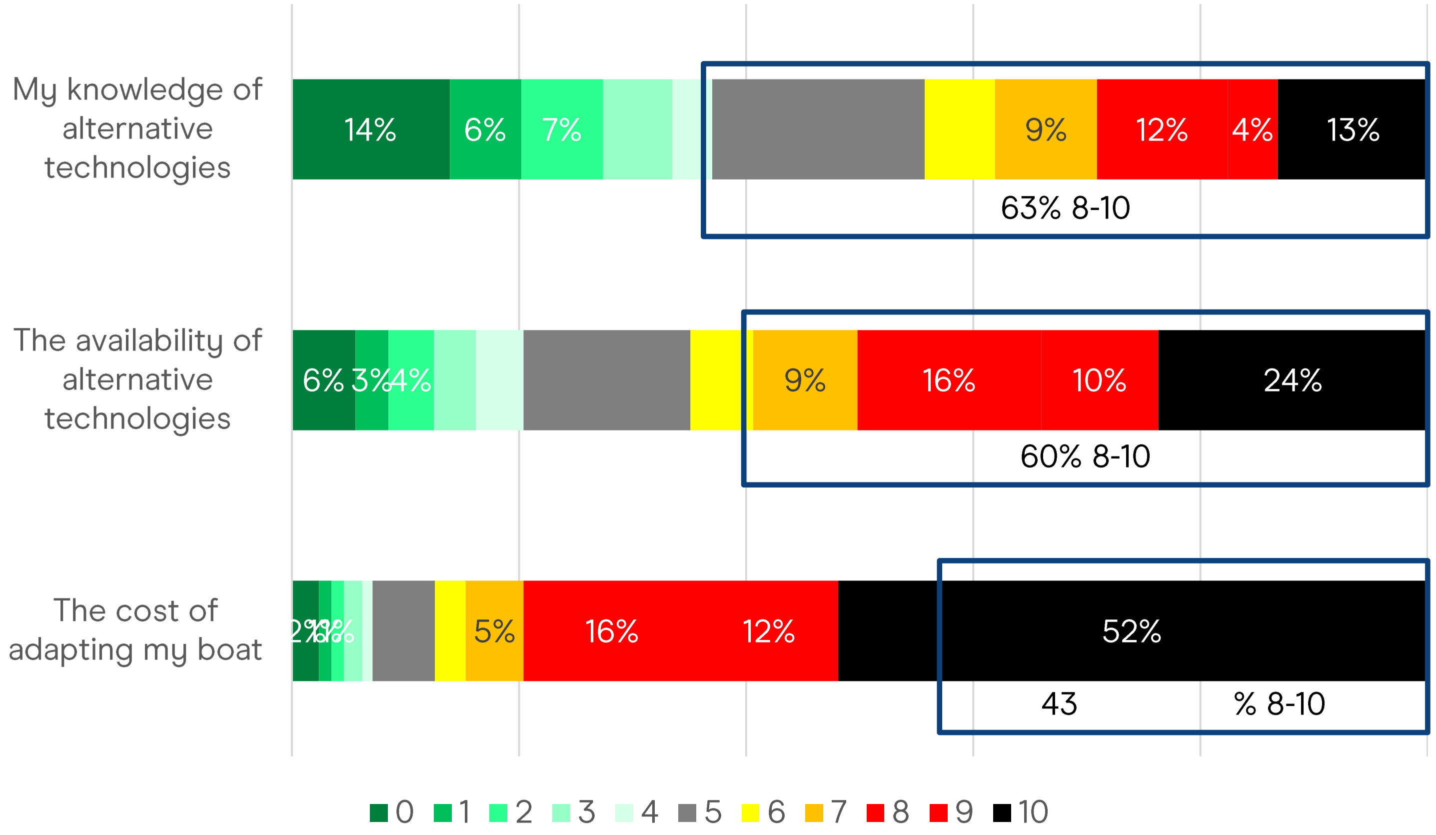
- Narrowboats highest viability:
  - Solar panels
  - Electric charging points
  - Biofuels
- Still, most ideas are being regarded as lukewarm with a very high minority simply regarding them as not viable.

Sample: 2021 n=214

Canal & River Trust

Barriers to Emission Reduction

Q29: On a scale of 0 to 10, to what extent do you feel that the following are barriers to reducing the emissions from your boat (0=No barriers & 10 = Total barrier)

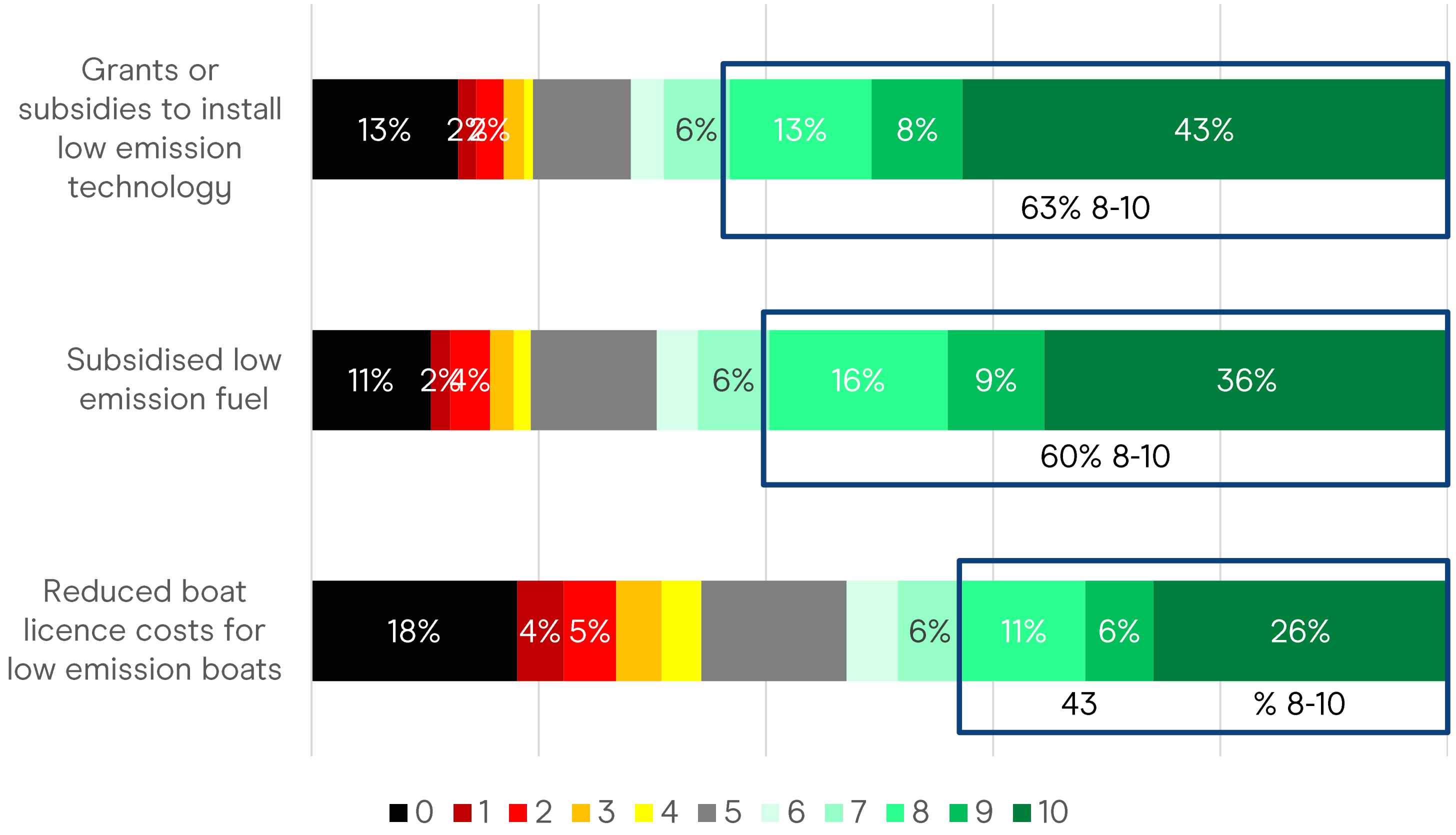


Sample: 2021 n=214

- **Cost is the highest and strongest barrier to reducing emissions on people's boats.**
  - Those selecting 8,9,10 make up 79% of respondents.
  - 52% said that cost is a 'total barrier'
- Availability of alternatives is also seen as an issue by many, with knowledge being in third place

Incentives to Emission Reduction

Q31: On a scale of 0 to 10, to what extent do you feel that the following measures would incentivise you to reduce emissions from your boat (0 = No incentive and 10 = Full incentive)

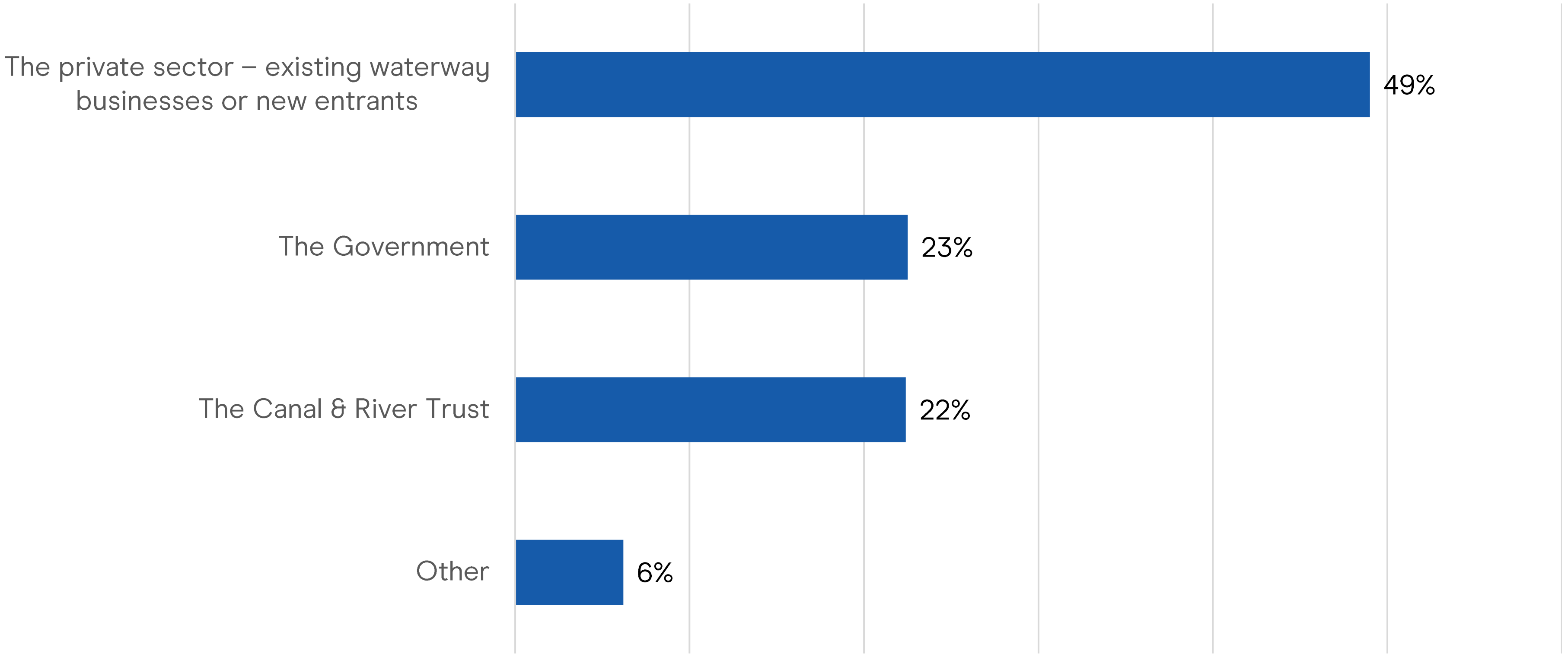


Sample: 2021 n=214

- Grants and subsidies (from the 3 options) are seen as the way to bring about change

Supply of Fuel

Q32: The Canal & River Trust does not currently supply fuel for propulsion to boaters. Thinking about the future and moving towards alternative zero emission sources of fuel, who do you think should lead the delivery of these?

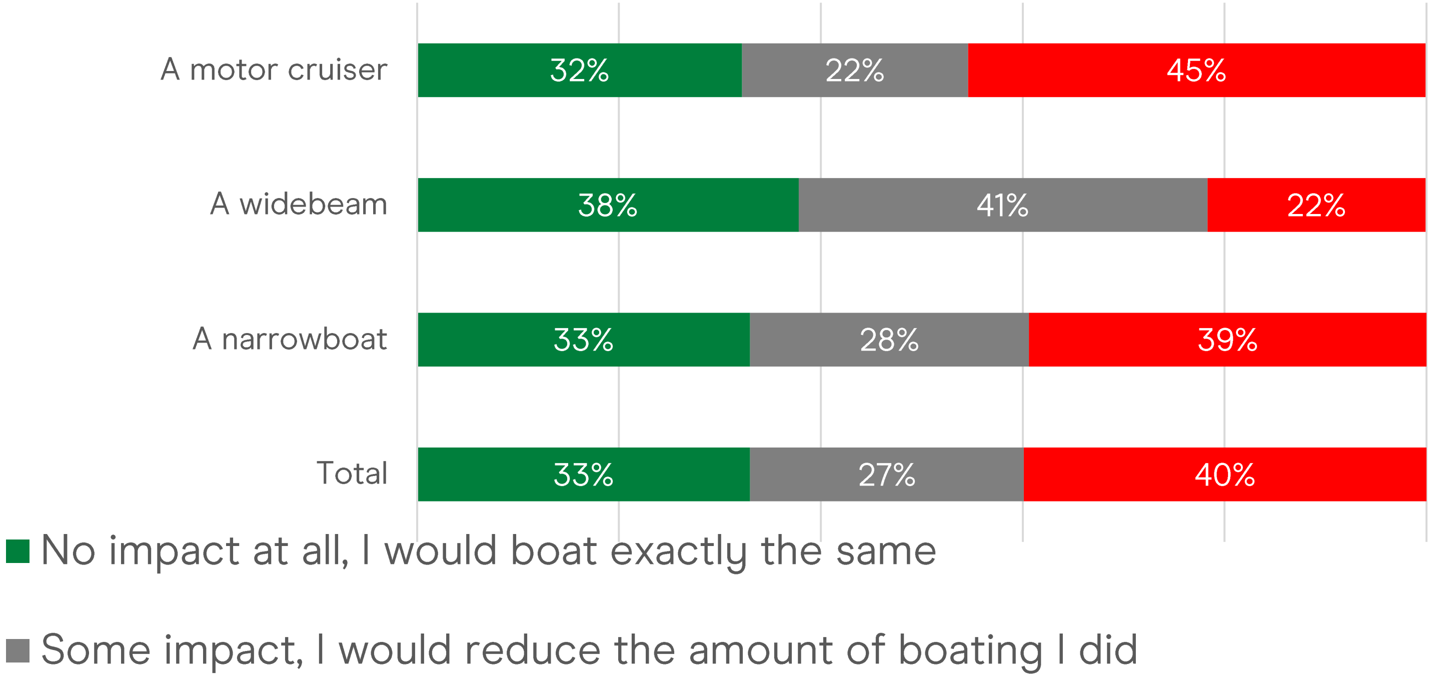


- Overwhelmingly, boaters feel that the private sector should be looking to supply propulsion fuels when thinking about future emission targets.

Sample: 2021 n=214

Registration & Regulation: Boat Maintenance & Emissions

Q34: What do you think would be the impact on your boating activity of having to adapt your boat to reduce emissions?



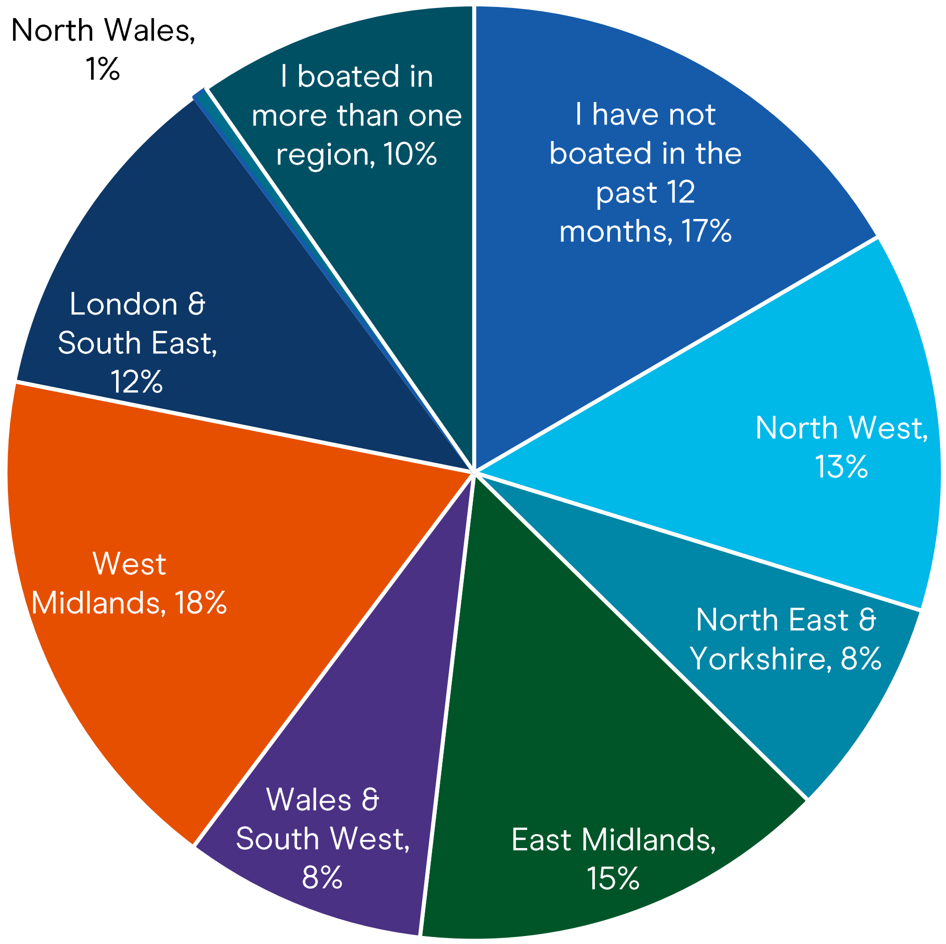
- The idea of having to adapt their boat to reduce emissions is received with very mixed views.
- For the most part, boaters indicate that it could either stop them altogether or reduce their boating.
- However, a significant minority (33%) say it will not impact them at all in terms of boating frequency

Sample: 2021 n=1170

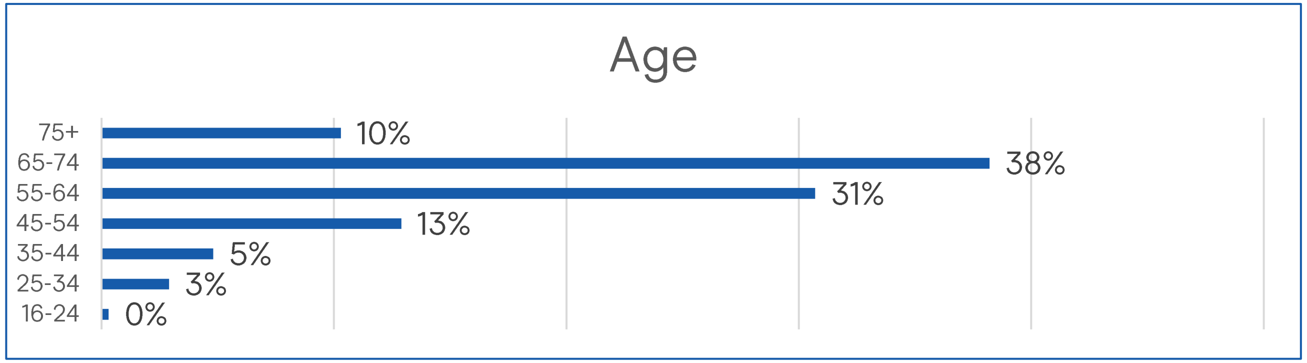
Total	A narrowboat	A widebeam	A motor cruiser	Other
1170	902	37	214	17

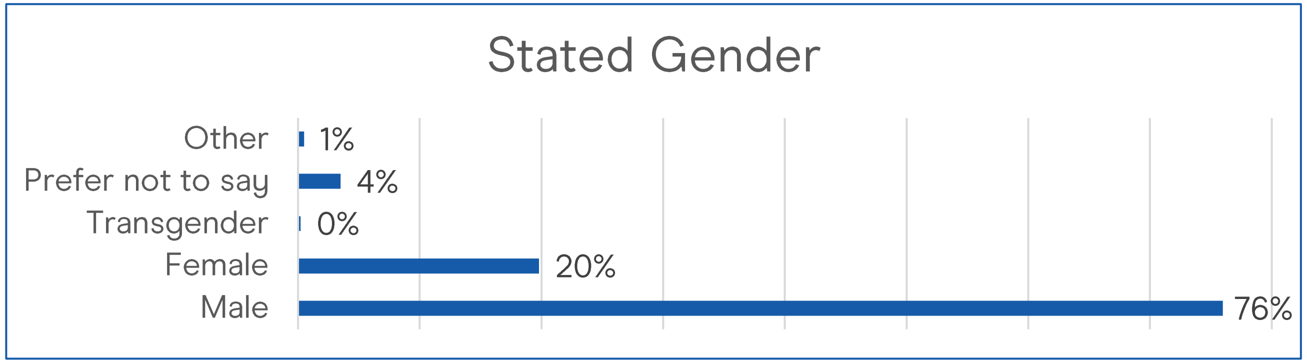

Sample
8

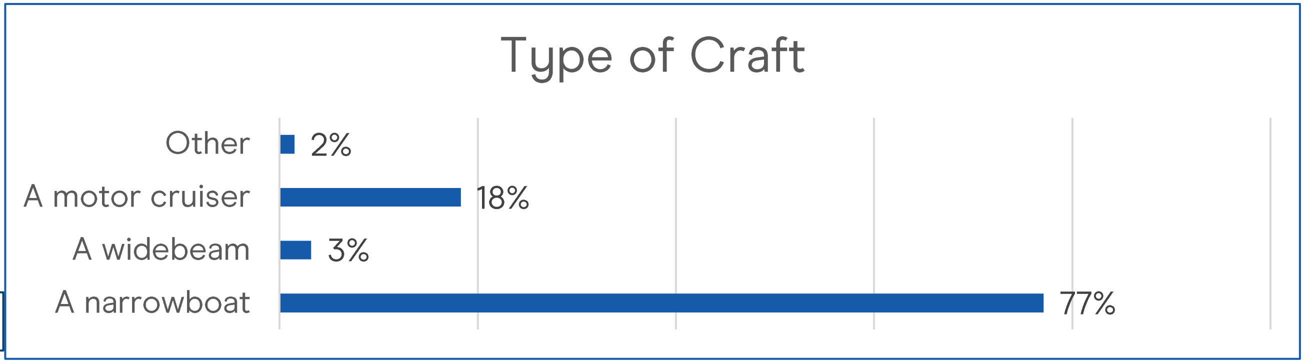
Sample



Sample: All (1179)



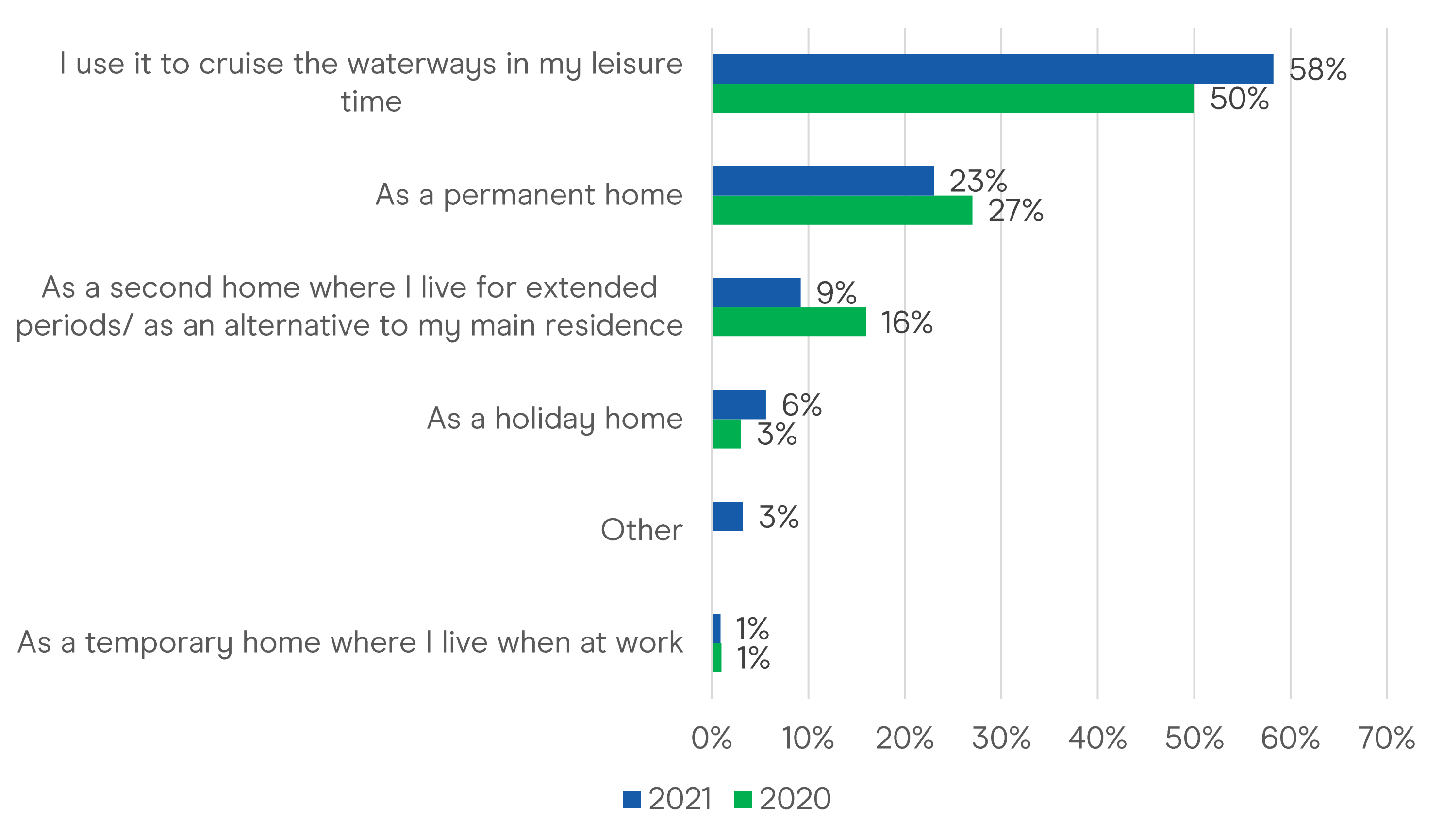





Basics
Boat Types
Boating use
9

Boat Use

Which of the following options best describes how you use your boat most of the time?
Please select one answer only

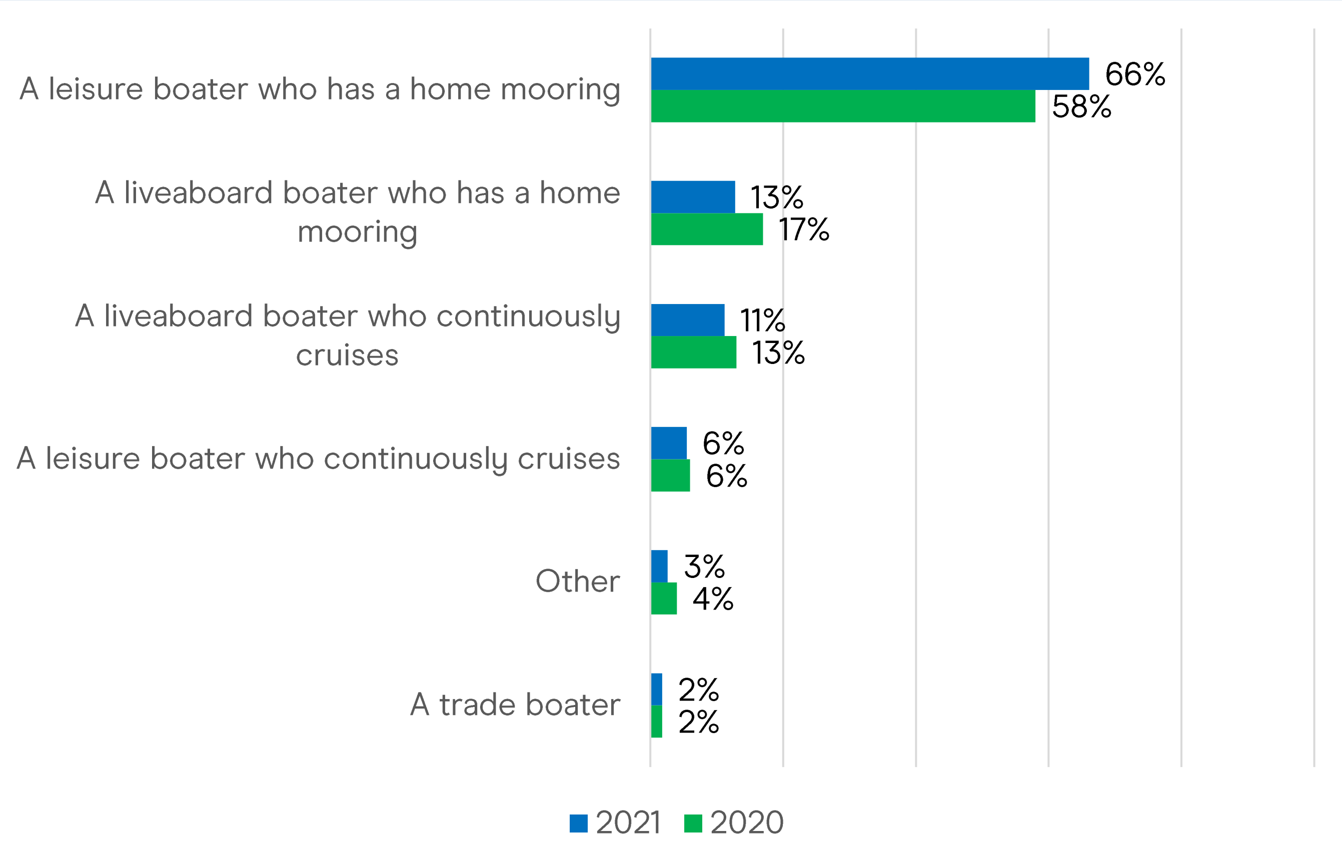


- Compared to 2020, boat use has varied slightly but not statistically significantly.

Sample: All (1179)

Type of Boater

Q5: Please select which best describes you?
Please select one answer only

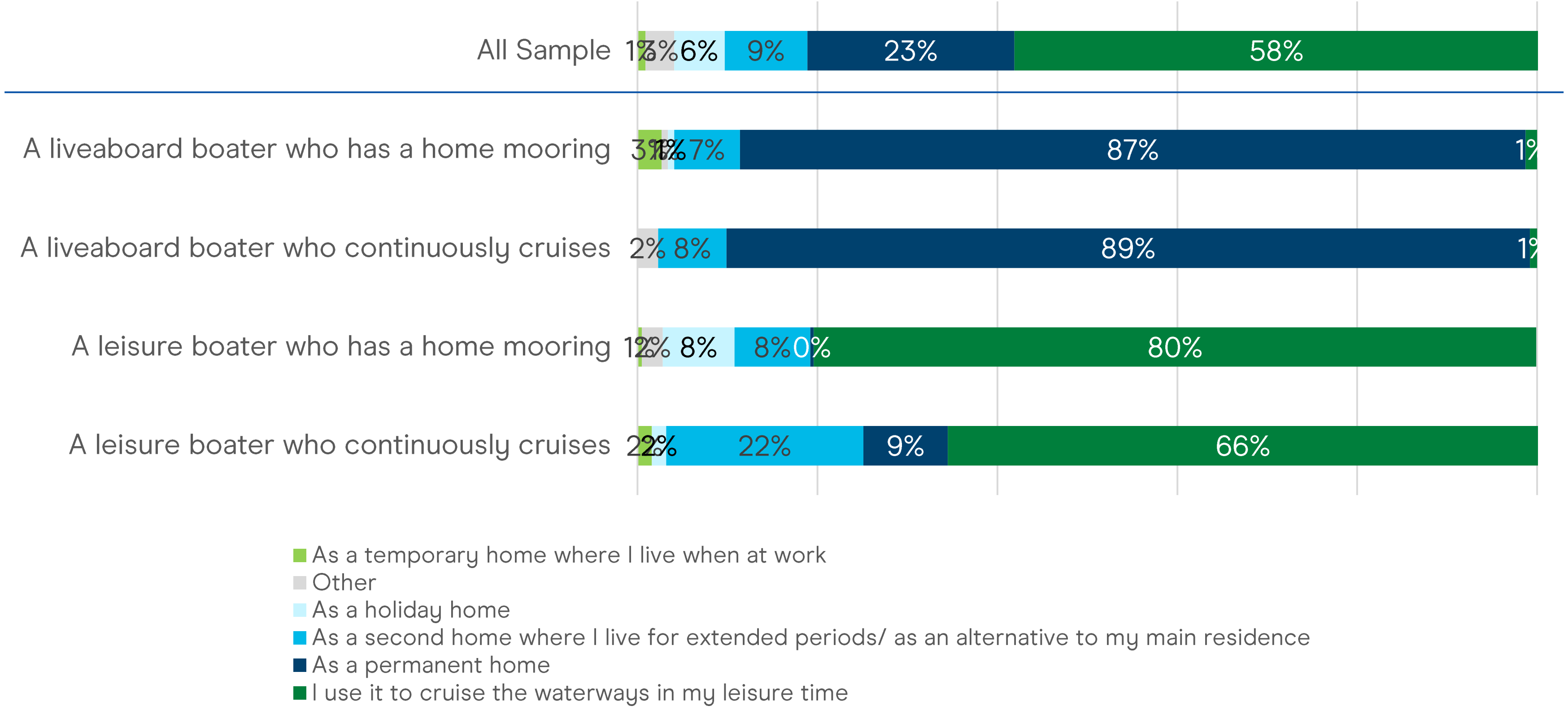


Sample: All (1179)

- Small changes in sample composition between 2021 in terms of boater type do exist
  - More leisure boaters with a home mooring took part in the survey
  - Fewer liveaboard boaters took part in the survey

Boat Use by Boater Type

Which of the following options best describes how you use your boat most of the time?
Please select one answer only



How different people use their boats is highly dependent on what category of boater you see yourself.

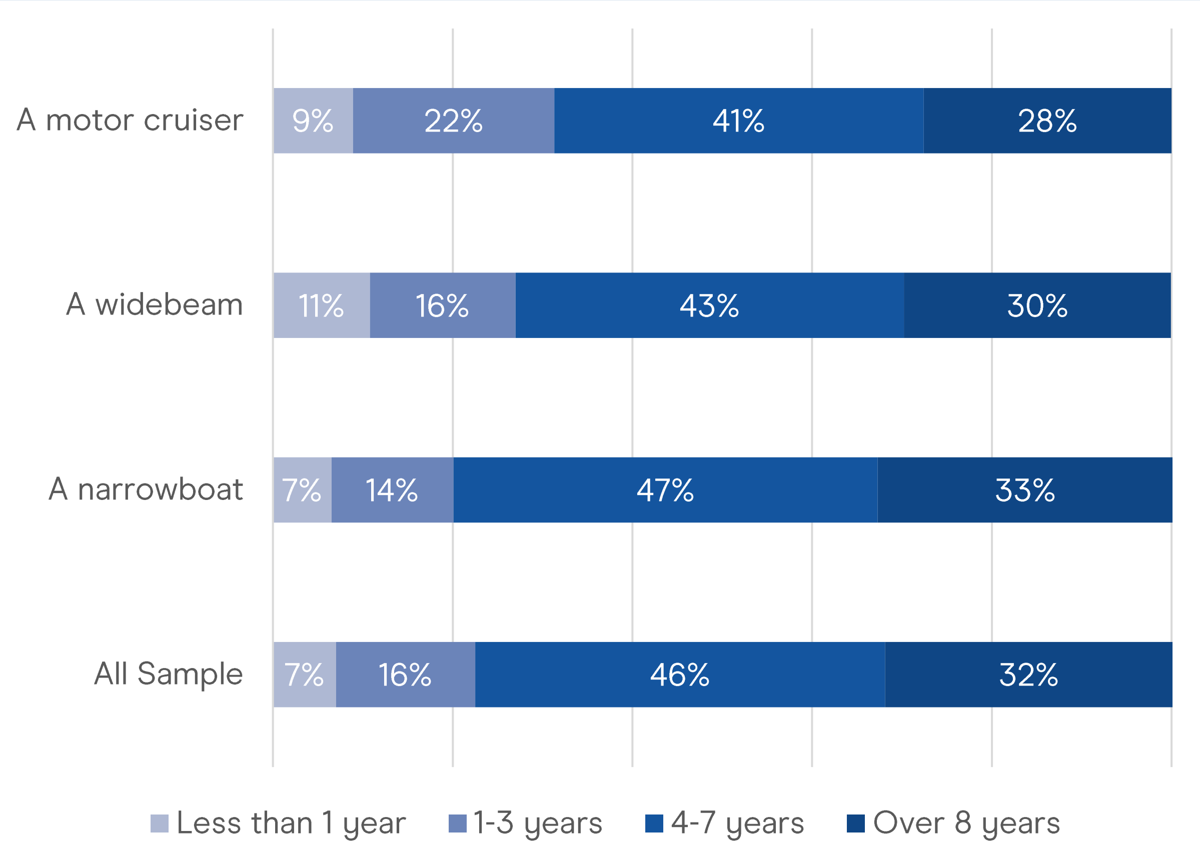
For 2021, the usage is very much:

- Liveaboards – permanent home
- Leisure boaters – leisure use.

Sample: All (1179)

Ownership

Q6: Please tell us how long you have had a boat?



Sample: All (1179)

- A new question added in 2021 asks about length of boat ownership.
- 78% of respondents say they have owned their boats for 4 or more years.